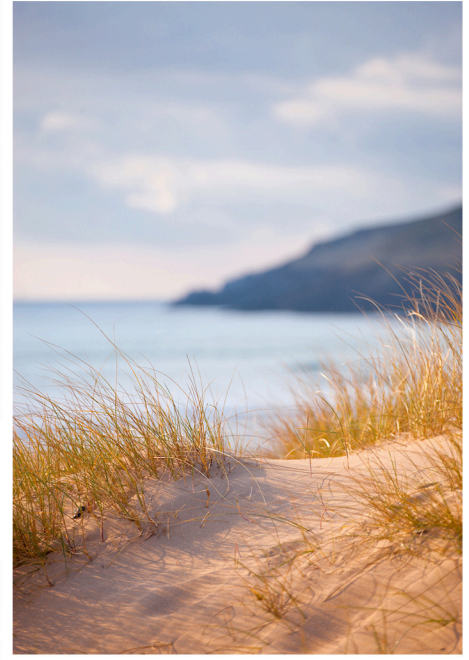
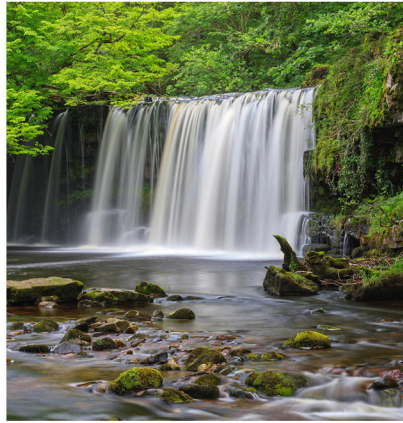


# Wales Tourism Business Barometer 2020

## Covid-19 Impact Wave 3 Report



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## Wales Tourism Business Barometer 2020: Covid-19 Impact Wave 3 Report.

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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## **1.     Headline Findings**

### **Survey conducted between 22<sup>nd</sup> April and 1<sup>st</sup> May**

- 1.1     We conducted a telephone survey between 22<sup>nd</sup> April and 1<sup>st</sup> May with 805 tourism businesses covering serviced accommodation, self catering, caravan & campsites, hostels, attractions, activity providers, restaurants, pubs and cafes. In some sectors such as restaurants, pubs & cafes it was very difficult to reach anyone on the phone due to lockdown and so the numbers represented in this wave are very low.
- 1.2     The situation with Covid-19 is very fast-moving. These interviews were conducted while the Government's exit strategy and approximate timings remained unknown.

### **Furlough support has kept redundancies to a minimum to date**

- 1.3     The majority (71%) of businesses which employ any staff said they had to put at least some of them on paid leave / furlough. This is a significant increase from the previous research wave (50%), which was conducted at the end of March.
- 1.4     On average, 8 staff per tourism business were furloughed / put on paid leave. When based to just businesses taking that action, the average was 11 per business. If a business furloughed any staff, it was likely to be all or nearly all of those they employ.
- 1.5     By comparison, the average no. of redundancies made per business which employs staff was only 0.1. The support for furloughed staff has helped to keep this number low to date.

### **Impact on seasonal staff**

- 1.6     About one in six (16%) businesses would normally employ seasonal staff at this time of year. Out of these, a minority (14%) were still able to do so – or 2% of the whole survey sample.

### **Estimated 20% loss of normal annual revenue to date**

- 1.7     The median reported loss as a result of the crisis in just the period since the beginning of the outbreak was approximately 20% of normal revenue for the whole year. This finding was consistent across sector, region and business size.
- 1.8     The range was considerable – from not having lost anything, to over 80% of normal annual revenue.

### **Welsh Government Economic Resilience Fund**

- 1.9     While the Fund was open for applications, about half (48%) of tourism businesses interviewed had applied. Application levels were higher among the following types of business:

- Businesses with more than 5 permanent employees (60%)
- Attractions & activity providers (57%)
- Based in Mid Wales (68%)

1.10 About a third (32%) of applicants had been successful, 11% had been unsuccessful, and the remainder (57%) were still waiting for an outcome at the time of interviewing.

### **Other forms of government support**

1.11 Three in four (75%) businesses which were eligible for a business rates holiday had applied for a grant. But apart from business rate grants, few respondents had applied for any other support we asked about (either UK Government support or Development Bank of Wales loans). Businesses were reluctant to take on loans, which involve paying back with interest.

### **Surviving lockdown**

1.12 Around a quarter (23%) of businesses don't expect to survive the next three months if lockdown continues, while three in ten (30%) don't know how long they can survive.

1.13 However, around a third (31%) of operators could survive for longer than another 6 months of lockdown. Having another major income besides tourism appears to be a significant factor.

### **Medium and longer term concerns**

1.14 The most significant medium and longer term concerns are:

- Not making enough money in the summer to survive next winter
- Backlash from locals when opening up again to tourists
- Managing social distancing – could be very hard for some types of business
- Slow recovery due to customers' and/or owners' concerns over health risks

### **Desired support from Visit Wales (Welsh Government)**

1.15 Many commented on the good information and financial support already given. Further desired support includes:

- Guidance on how to operate safely post-lockdown
- Further financial support if the summer season is missed

## 2. Background and Methodology

### What is the Wales Tourism Business Barometer?

- 2.1 The Wales Tourism Business Barometer is designed to give quick feedback on how the tourism industry in Wales is performing at key times during the year.
- 2.2 This survey is the third extraordinary wave to research the impact of the Covid-19 outbreak on the tourism industry. The current plan is to repeat this survey every two to four weeks as necessary. There is also an accompanying online survey which businesses from a wider variety of sectors can participate in. The results of the online survey will be analysed separately on a periodic basis.

### How was the Survey conducted?

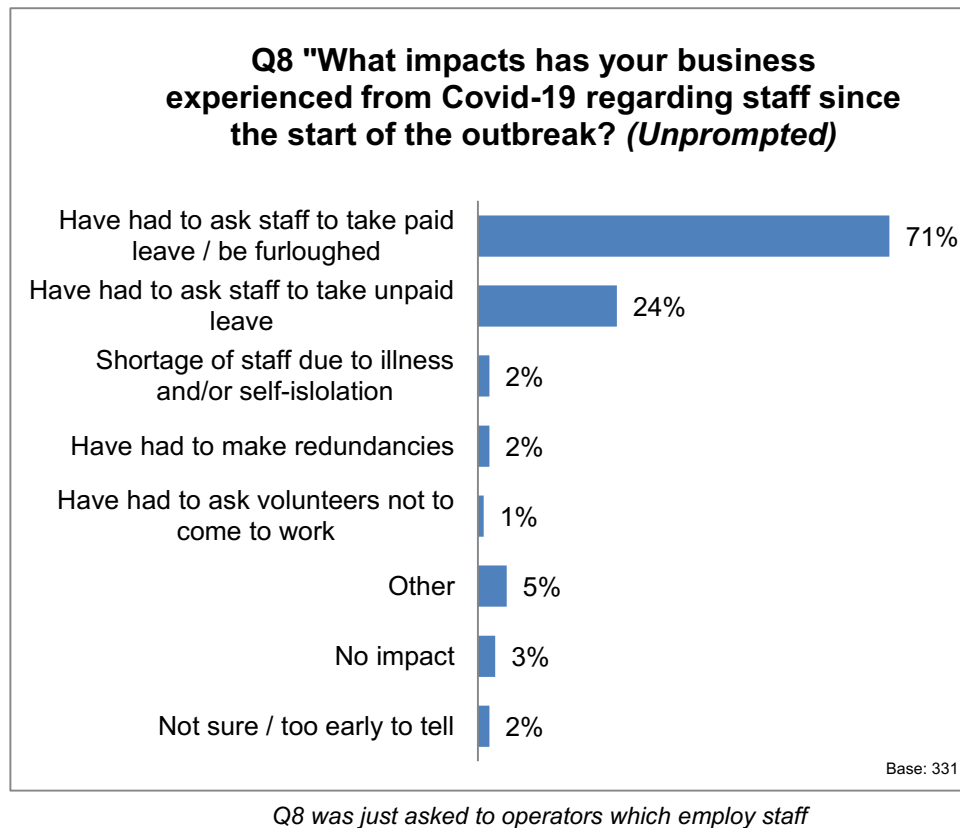
- 2.3 We conducted 805 interviews by telephone. This makes results of questions asked to everyone accurate to  $\pm 3.5\%$ . The sample is reflective of the tourism industry in Wales and is shown below by sector and region:

Sector / Region	North	Mid	South West	South East	Total
Serviced accommodation	125	41	79	57	302
Self-catering	120	69	90	60	339
Caravan / campsites	30	13	20	10	73
Hostels	5	5	6	6	22
Attractions & activity operators	15	13	20	16	64
Restaurants / pubs / cafes	1	4	-	-	5
<b>Total</b>	<b>296</b>	<b>145</b>	<b>215</b>	<b>149</b>	<b>805</b>

- 2.4 76% of businesses in the sample are graded by Visit Wales, and a further 2% which are not graded by Visit Wales are graded by other organisations. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes and activity operators, where grading is not applicable. All telephone interviews were conducted with business owners or managers between 22<sup>nd</sup> April and 1<sup>st</sup> May.
- 2.5 In the restaurants / pubs / cafes sector it was very difficult to reach anyone on the phone due to lockdown measures. This does not distort the overall findings significantly, but it does mean we cannot report on this sector specifically.

### 3. Impact on Staff

#### Impact on staff in general



#### Significant increase in furloughing since the previous research wave

3.1 The majority (71%) of businesses which employ any staff said they had to put at least some of them on paid leave / furlough. This is a significant increase from the previous research wave (50%), which was conducted at the end of March.

3.2 The proportion of businesses furloughing staff by region was as follows:

- North Wales – 80%
- Mid Wales – 60%
- South West Wales – 67%
- South East Wales – 72%

Action	Total no. employed	Av. Staff on leave / redundant (Base: businesses taking the action)	Av. Staff on leave / redundant (Base: all businesses which employ staff)
Staff furloughed / on paid leave	1	1.0	0.4
	2	1.9	1.2
	3	2.6	1.5
	4	3.4	2.8
	5	4.4	2.4
	6 – 10	7.1	6.6
	11 – 50	19.1	16.5
	Over 50	55.2	55.2
	Overall	11.0	7.7
Staff on unpaid leave	Overall	3.0	0.8
Staff made redundant	Overall	5.3	0.1

*The averages for unpaid leave and redundancies are not split by business size due to low base when split*

### **If any staff were furloughed, it amounted to all or nearly all staff**

- 3.3 On average, 8 staff per tourism business were furloughed / put on paid leave. When based to just businesses taking that action, the average was 11 per business. If a business furloughed any staff, it was likely to be all or nearly all of those they employ (comparing each average with the no. employed).

*“29 furloughed, 3 still employed (wedding planners and accountant)”*  
Serviced, Mid

- 3.4 The splits by region for furloughing were as follows:

Region	Av. Staff furloughed (Base: businesses taking the action)	Av. Staff furloughed (Base: all businesses which employ staff)
North Wales	9.0	6.9
Mid Wales	7.2	4.4
South West Wales	12.0	8.0
South East Wales	15.6	10.1



### **Minimal redundancies to date**

- 3.5 By comparison, the average no. of redundancies made per business which employs staff was only 0.1. The support for furloughed staff has helped to keep this number to a minimum to date.
- 3.6 At the time of writing (4<sup>th</sup> May), the furlough support had been promised until the end of June. If lockdown continues for longer, it was not yet known whether this scheme would be extended, and for how long.

## Seasonal staff

<b>Q5 "How many seasonal workers would you normally employ at this time of year?"</b>	<b>Region of Wales</b>				
	<b>All Wales</b>	<b>North</b>	<b>Mid</b>	<b>SW</b>	<b>SE</b>
None	84%	84%	84%	85%	84%
1	3%	3%	3%	4%	3%
2	4%	3%	7%	5%	4%
3	1%	1%	–	–	1%
4	2%	2%	3%	1%	2%
5	–	1%	–	–	–
6 to 10	2%	2%	1%	1%	4%
11 to 50	2%	3%	2%	2%	1%
More than 50	1%	–	–	–	1%
Don't know	1%	1%	1%	1%	
<i>Base</i>	<i>805</i>	<i>296</i>	<i>145</i>	<i>215</i>	<i>149</i>

### Seasonal staff more likely in attractions & activities

- 3.7 The survey was conducted at the time of year when some tourism businesses start employing seasonal workers. About one in six (16%) would normally do so. This is more likely to be the case for attractions & activity providers, whereby 28% would normally employ seasonal workers at this time of year.

**Q6 (If any normally employed) "If any, how many seasonal workers have you been able to employ this year?"**

None	86%
1	5%
2	2%
3	1%
4	2%
5	1%
6 to 10	2%
11 to 50	2%

*N.B. The base is too small to split reliably by region*

Base: 123

### **Some seasonal staff taken on in spite of the crisis**

- 3.8 Most (86%) businesses which would normally employ seasonal staff at this time of year were not able to employ any yet this year. This was especially the case among serviced accommodation businesses, where 97% were not able to employ seasonal staff.

*"We have asked two seasonal workers not to start work"*  
Serviced, North

- 3.9 However, the crisis did not wipe out all seasonal employment – especially outside of the serviced sector, where 24% of businesses were able to employ seasonal staff this year.

*"The cleaner goes in twice a week to check on the property for the insurance and the gardener once a month to keep it tidy"*  
Self catering, North

### **Furloughing seasonal staff**

- 3.10 Most (89%) businesses which normally employ seasonal staff at this time of year said they currently employed none who were eligible for furlough, usually because none were employed before the key eligibility date of 19<sup>th</sup> March.
- 3.11 The remaining 11% had seasonal staff eligible for furlough – more so outside of the serviced sector (17%).

## 4. Impact on Revenue

### Loss in revenue

Q9 "... how much revenue has your business lost so far due to the Covid-19 crisis?"	Region of Wales				
	All Wales	North	Mid	SW	SE
Haven't lost any revenue	1%	–	–	2%	2%
Up to £1,000	3%	2%	5%	3%	2%
£1,001 – £2,500	7%	5%	8%	7%	9%
£2,501 – £5,000	18%	17%	15%	20%	18%
£5,001 – £10,000	25%	26%	33%	19%	20%
£10,001 – £25,000	22%	25%	19%	20%	22%
£25,001 – £50,000	10%	10%	10%	12%	8%
£50,001 – £100,000	8%	6%	4%	11%	10%
£100,001 – £250,000	4%	4%	5%	3%	6%
£250,001 – £500,000	2%	2%	2%	1%	2%
£500,001 – £1,000,000	1%	1%	–	1%	2%
<i>Base</i>	<i>571</i>	<i>220</i>	<i>102</i>	<i>143</i>	<i>106</i>

### Lost revenue stacking up

- 4.1 The value of lost revenue as a result of the crisis varied considerably by size of business, but overall in the industry, the median loss per business at the time of interviewing lay between £5,000 and £10,000. The table below shows the approximate median loss per business by no. of employees:

No. of permanent paid staff	Approx. median loss in revenue to date
None	£5,000 to £10,000
1 – 5	£10,000 to £25,000
6 – 10	£50,000 to £100,000
11 – 50	£50,000 to £100,000
More than 50	£250,000

Q10 "And roughly what proportion of your normal annual revenue does that loss represent so far?"	Region of Wales				
	All Wales	North	Mid	SW	SE
2% or less	–	1%	–	–	–
3 – 5%	1%	1%	–	2%	2%
6 – 10%	11%	8%	10%	14%	13%
11 – 15%	17%	13%	20%	18%	18%
16 – 20%	24%	23%	29%	18%	30%
21 – 30%	23%	25%	24%	22%	19%
31 – 40%	12%	15%	6%	15%	7%
41 – 50%	5%	6%	5%	3%	6%
51 – 60%	2%	4%	1%	2%	2%
61 – 70%	1%	3%	1%	1%	–
71 – 80%	1%	1%	–	2%	–
Over 80%	3%	2%	4%	3%	2%
Base	486	193	83	121	89

### Relative impact is painful across all sizes of business

4.2 Although the £ value of lost revenue to date differed greatly by size of business, the proportion of normal annual revenue the loss represented did not. Across all sizes of business, the median reported loss as a result of the crisis in just the period since the beginning of the outbreak was approximately 20% of normal revenue for the whole year. The picture was also consistent across all sectors and regions.

*"There's a chance I won't have a business soon"*

Serviced, North

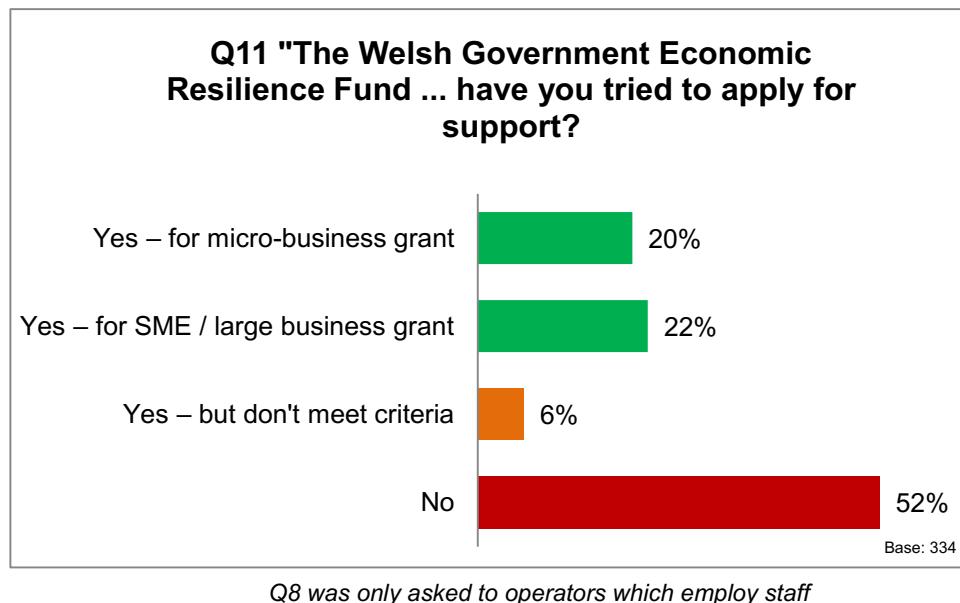
*"I'm coming to the end of my savings and I can't see any business until next May now. My wife and I are thinking about selling up."*

Serviced, North



## 5. Welsh Government Economic Resilience Fund

### Applying for support



### About half of businesses with staff had applied

5.1 The Welsh Government Economic Resilience Fund opened for applications on Friday 17<sup>th</sup> April. It was open to businesses employing staff through PAYE, which also had to meet a list of further criteria. It was paused on Monday 27<sup>th</sup> April following a very high level of applications – about halfway through the fieldwork for this research.

5.2 As this was a sample survey, the best data to understand the full picture is the ERF management information.

5.3 While the Fund was open for applications, about half (48%) of the tourism businesses interviewed applied. Application levels were higher among the following types of business:

- Businesses with more than 5 permanent employees (60%)
- Attractions & activity providers (57%)
- Based in Mid Wales (68%) – see quotes below

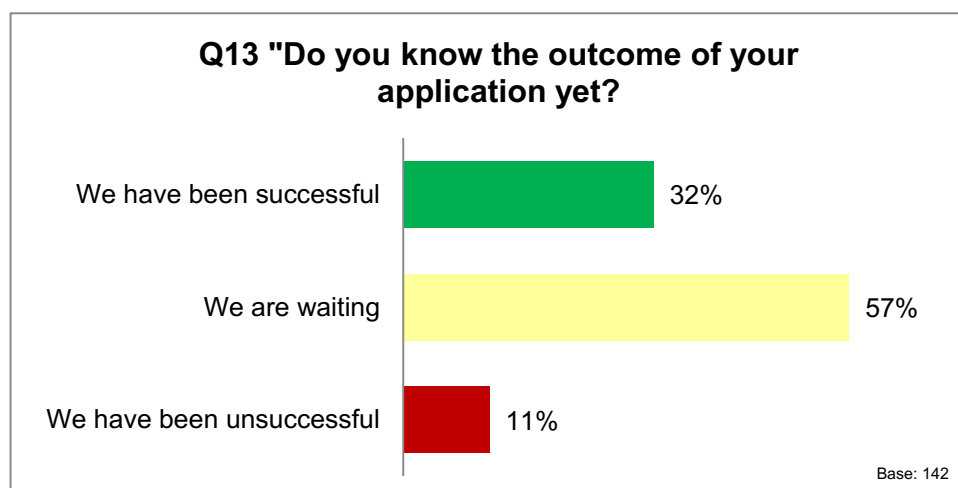
*"We're very pleased with all the updates we're getting from Mid Wales Tourism, who are fantastic"*  
Self catering, Mid

*"Mid Wales Tourism and Visit Wales have been fantastic. The updates on Facebook are great – it saves me having to look on Business Wales websites."*  
Serviced, Mid

5.4 The table below shows the results to Q11 split by region:

<b>Q11 “The Welsh Economic Resilience Fund ... have you tried to apply for support?”</b>	<b>Region of Wales</b>			
	<b>North</b>	<b>Mid</b>	<b>SW</b>	<b>SE</b>
Yes – for micro-business grant	5%	5%	8%	5%
Yes – for SME / large business grant	18%	37%	20%	11%
Yes – but don't meet criteria	23%	26%	18%	23%
No	54%	32%	54%	61%
<i>Base</i>	<i>114</i>	<i>57</i>	<i>89</i>	<i>74</i>

## Outcomes



*N.B. The base is too small to split reliably by region*

### **Around three in four known outcomes were successful**

- 5.5 Where an outcome was known, about three in four had been successful. There were some regional differences at the point of interviewing, with 69% of Mid Wales businesses knowing their outcome – 61% had been successful, compared to only 8% unsuccessful.
- 5.6 Over half of businesses (57%) were still awaiting the outcome. This was particularly the case among businesses with more than 10 permanent employees (73%).

## 6. Other Forms of Support

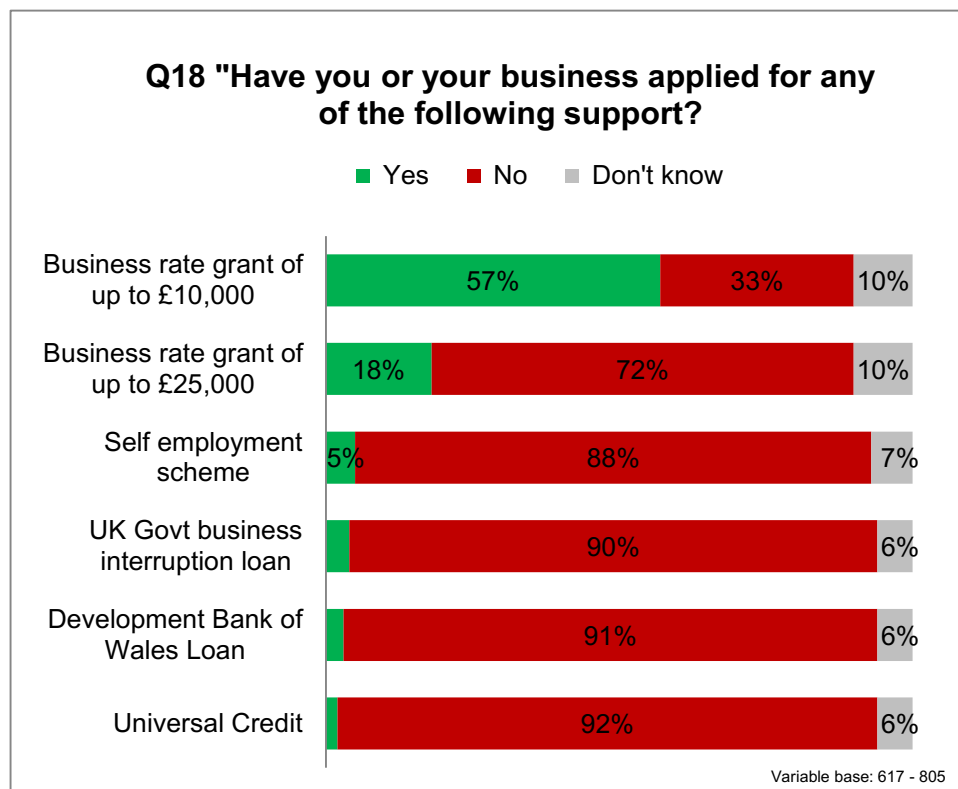
### Business rates holiday

6.1 Around half (48%) of businesses responding said they were eligible for a business rates holiday. The proportion was higher among:

- Businesses with 6 – 10 permanent employees (75%)
- North Wales businesses (58%)

6.2 Eligibility was lower at either end of the business size spectrum. Open comments suggested this could be due to either paying domestic rates (which many micro-businesses do), or having a rateable value too high to qualify.

### Government schemes



*Businesses not eligible for a business rates holiday have not been asked about business rate grants*

### Business rate grants applied for, but little else

6.3 Three in four (75%) businesses interviewed which were eligible for a business rates holiday had applied for a grant. The application level was highest in North Wales, where 83% had applied.

6.4 But apart from business rate grants, few respondents had applied for anything other support listed above. Universal credit is a personal benefit (for many micro-business owners, their

personal and business finances are closely linked), and the self-employment scheme only applied to some.

- 6.5 As for loans though, there seemed to be little appetite in the industry to risk taking on extra debt which they may not be able to repay. Application for loans was highest among the largest businesses (with more than 50 employees) – 14% had applied for the Development Bank of Wales loan scheme, and likewise the UK government business interruption loan.

*"I don't want to take out a loan unless it's absolutely necessary"*

Serviced, South West

*"I don't borrow from banks"*

Caravan park, South West

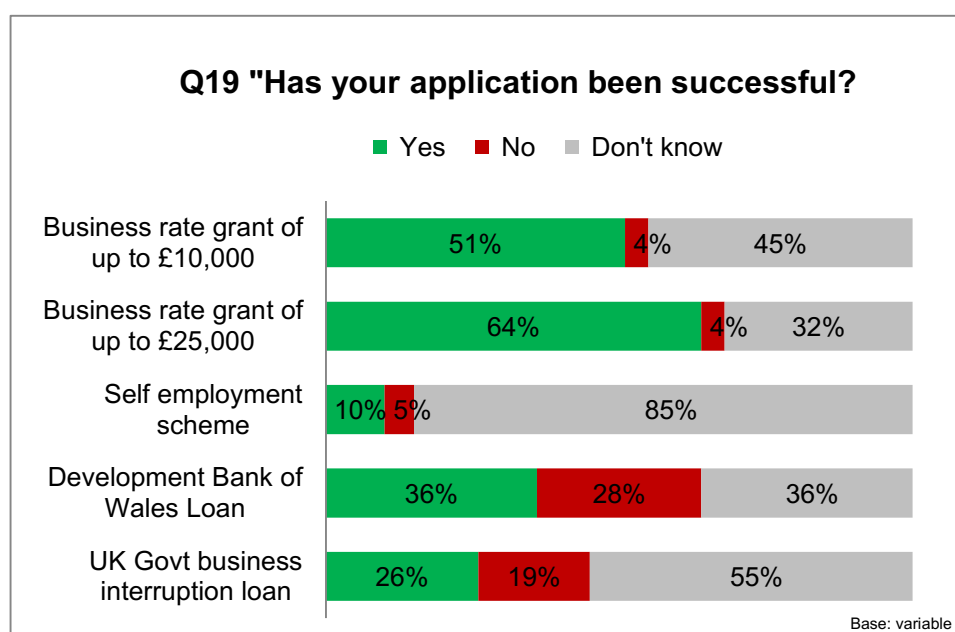
*"I don't want a loan because I can't guarantee money coming in to pay it off and I don't want to get in more debt"*

Serviced, Mid

- 6.6 The tables below show the % of businesses applying for grant split by region:

Type of grant	% applied by region of Wales			
	North	Mid	SW	SE
Up to £10,000	63%	58%	55%	48%
Up to £25,000	19%	20%	15%	19%

## Outcomes



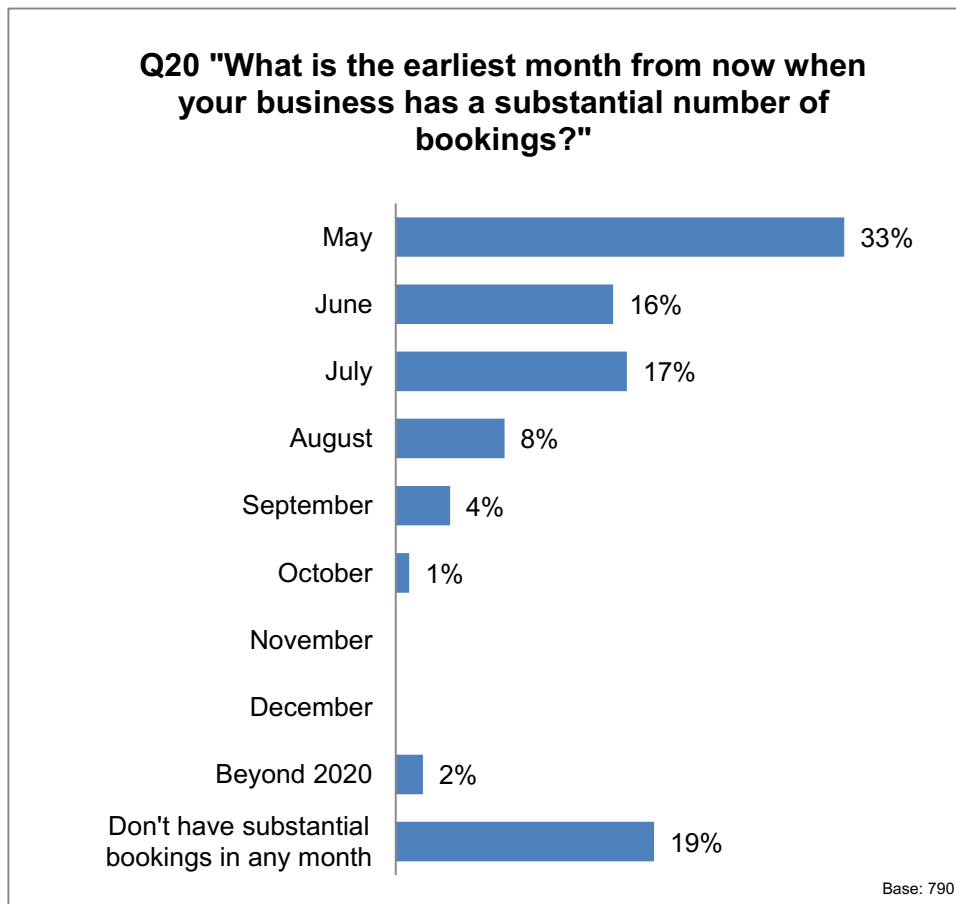
### **Grant applications usually successful; mixed success with loans**

- 6.7 Where the outcome of a grant application was known, the outcome was usually successful. With the loans, the success rate was lower. The base sizes for the results are too small to split reliably by region.



## 7. The Future

### Future bookings



#### Many more bookings were about to be lost

- 7.1 While tourism businesses were still unclear about when they can re-open, and in what form, many further bookings were about to be lost.

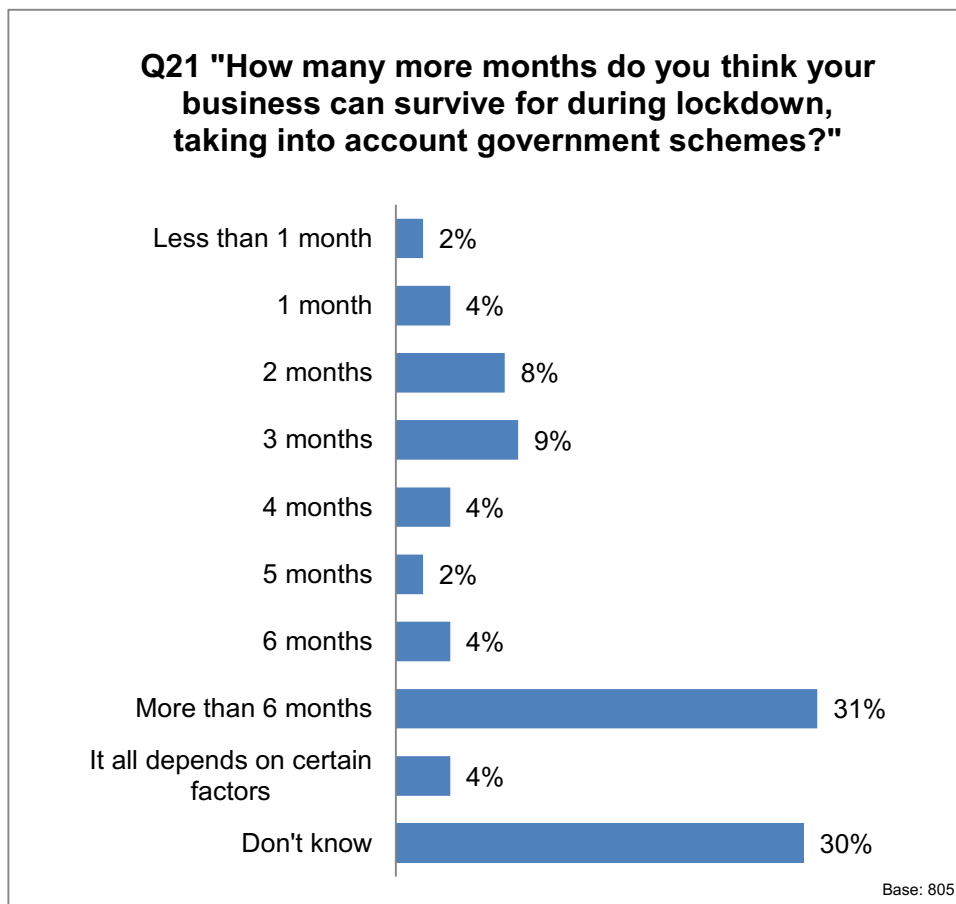
*"I did the [financial] modelling yesterday and by some time around Christmas I will have extended my overdraft facilities to its maximum. If I can't accept the bookings that I have for July, my business is basically doomed."*

Serviced, Mid

- 7.2 In particular, South East Wales businesses were going to be hit hard by continued lockdown. They could have been in for a strong month in May – 84% said they had substantial bookings in May.
- 7.3 The table below shows the results to Q20 split by region:

<b>Q20 “What is the earliest month from now when your business has a substantial number of bookings?”</b>	<b>Region of Wales</b>			
	<b>North</b>	<b>Mid</b>	<b>SW</b>	<b>SE</b>
May	25%	24%	15%	84%
June	13%	22%	23%	5%
July	19%	14%	26%	4%
August	9%	17%	7%	2%
September	6%	3%	3%	–
October	1%	1%	–	–
November	–	–	–	–
December	–	–	–	1%
Beyond 2020	2%	1%	2%	–
Don’t have substantial bookings in any month	24%	18%	24%	5%
<i>Base</i>	<i>291</i>	<i>138</i>	<i>212</i>	<i>149</i>

## Survival



### Some are staring insolvency in the face

- 7.4 Businesses recognise that Government schemes to date have helped them in many ways – most notably they have been able to furlough staff instead of making them redundant.
- 7.5 However, in spite of the support, around a quarter (23%) of businesses don't expect to survive the next three months if lockdown continues, while three in ten (30%) don't know how long they can survive.

*"The £25,000 [grant] was all well and good but that money has gone already. If we are unable to open by June/July, we won't have anything to keep us going."*  
Serviced, South East

### Others are in a different situation

- 7.6 Around a third (31%) of operators are in a more comfortable position of being able to survive for longer than another 6 months of lockdown. These are more likely to be:
- Businesses with no permanent staff (37%)
  - Hostels (41%) and self catering operators (38%)

- Businesses in South West Wales (40%) and Mid Wales (35%)

7.7 The tourism industry in Wales comprises numerous 'lifestyle businesses', whereby tourism is not the main income stream for the owners.

*"It's an additional income as I have another job so I am lucky in that respect that I own another house"*  
Self catering, North

*"As I have a separate job I think I will be okay. I still have an income coming in."*  
Self catering, South West

### **'It depends'**

7.8 Among those answering 'it all depends on certain factors', the two main factors given are:

- Whether their grant application would be successful
- Whether there will be a summer season this year

*"If things don't start back during summer months, we might not open ever again"*  
Serviced, South West

*"If we don't get a grant [applied for], we'll have to sell"*  
Self catering, North

*"We need a grant [applied for], otherwise the business won't be able to survive past a few weeks"*  
Serviced, North

### **Region split**

7.9 The table below shows the results to Q21 split by region:

Q21 “How many more months do you think your business can survive ... taking into account government schemes ...?”	Region of Wales			
	North	Mid	SW	SE
Less than 1 month	4%	1%	2%	–
1 month	5%	6%	1%	5%
2 months	7%	11%	7%	11%
3 months	8%	12%	7%	12%
4 months	3%	6%	3%	6%
5 months	2%	2%	1%	3%
6 months	5%	2%	6%	5%
More than 6 months	25%	35%	40%	28%
It all depends on certain factors	5%	1%	6%	5%
Don't know	35%	23%	29%	26%
Base	296	145	215	149

## Medium and longer term concerns

7.10 We asked respondents the open question, “After lockdown measures are relaxed and tourism businesses can receive visitors again, do you have any medium to long term concerns about the survival of your business?”. We discuss the main themes below.

### It's like ‘three winters’

7.11 Many tourism businesses need to make enough profit in the summer in order to survive the following winter. If the summer season is missed this year, there are significant concerns about longer term survival. Some describe this as like having ‘three winters’ in a row.

*“If the lockdown and the furloughing continues, we would be all right for a while but if we didn't open until, say, October, we'll be in trouble. It's like having three winters back-to-back.”*

Serviced, North

*“Some people are describing it as a ‘three winters’ scenario – winter, no summer, winter”*

Attraction, North



## **Communities resisting visitors**

- 7.12 Some businesses fear backlash from locals when they start receiving visitors again. Shortly before the lockdown, there was a lot of anger towards non-local visitors in certain parts of Wales – especially in the rural north.

*“I’m concerned about repercussions from the locals if we relaxed too early as there is a lot of animosity”*

Caravan park, North

*“The guests from further afield have been so put off not only by the council but by locals. There’s so much hate for out of towners now.”*

Attraction, Mid

## **How will social distancing work for certain types of business?**

- 7.13 Businesses generally understand that when they are allowed to receive visitors again, they won’t be able to go straight back to normal operation like before. There will presumably be some form of social distancing guidelines in place.

- 7.14 Some businesses struggle to see how this could work for them. Examples include certain activity operators where physical contact with guests cannot easily be avoided, and small accommodation operating in confined spaces (e.g. breakfast rooms).

*“I’m concerned about breakfast hygiene”*

Serviced, North

*“It will be virtually impossible to operate and maintain social distancing. We can do our best but people need physical support in rock climbing and kayaking. I can’t not help them.”*

Activity provider, South West

## **Slow recovery – caution among customers and owners**

- 7.15 It may take a long time for some visitors to have the confidence to travel again, and in the case of some owners, the confidence to receive them. There are significant health concerns – the owners themselves may be elderly and at higher risk from the virus.

*“I’m concerned about contracting the virus myself if we open because I’m vulnerable”*

Self catering, North

- 7.16 As well as health concerns, another reason for a slow recovery could be the lack of income if people have lost their jobs or taken pay cuts.

*“If people have lost their jobs then they won’t be able to afford holidays”*

Self catering, North

### **Will there be anything for visitors to do?**

- 7.17 Clarity is needed on the order of tourism-related businesses being able to open up again. Some accommodation providers point out that it is all very well them being able to receive visitors again, but if restaurants, pubs and attractions in the area remain closed, there might be little for potential visitors to do.

*“We won’t be able to trade if restaurants aren’t open”*  
Serviced, North

*“Will pubs and restaurants be open or will they be last? Will the National Trust gardens etc be open?”*  
Serviced, Mid

### **No major concerns for some if tourism is not the main income**

- 7.18 Some operators said they can ‘mothball’ their tourism business until it is advisable and economical to open up again. While they may be disappointed about the loss of their additional income, being able to rely on their main income puts them in a far less desperate position than other businesses.

*“I’m one of the lucky ones – I don’t rely on the B&B to earn a living. My husband works and so it’s just pocket money for me.”*  
Serviced, Mid

### **A few see positives**

- 7.19 While there are many reasons for tourism business owners to fear the future, a few are hopeful of a bounce in domestic tourism if UK holidaymakers either can’t or don’t want to risk booking holidays abroad.
- 7.20 Some also pointed out that they have a strong base of regular customers, who they expect to return as soon as lockdown measures are lifted.

*“I’m optimistic that things will get better next year. More people will be holidaying at home.”*  
Serviced, South West

### **Desired support from Visit Wales (Welsh Government)**

- 7.21 We asked respondents the open question, “Visit Wales is a part of Welsh Government. What kind of information or support regarding Covid-19 would you welcome from them if possible?”. We discuss the main themes below.

## **The support is already good**

- 7.22 Many respondents said that the information flow and financial support from Visit Wales / Welsh Government had been good so far, and they were grateful for this.

*"I am absolutely amazed and grateful for the help and advice the Welsh Government has given us. Paying the staff 80% and giving us the grant has been an absolute godsend."*

Serviced, North

*"I've been very happy with the information that's been coming through so far"*

Serviced, South East

## **Guidance on how to operate**

- 7.23 When businesses can start receiving visitors again, they will need clear guidelines on how to operate safely.

*"I just need info on how to clean properly and what length of time to keep between different people staying, after lockdown has ended"*

Self catering, South East

*"Just information on any additional measures that they want us to take? E.g. washing temperature for bedding and how to deep clean in the property and how long to spend doing that"*

Self catering, South East

## **Second home vs local business owner**

- 7.24 Some self catering operators felt annoyed that being able to claim support for their business was 'muddled' with second home ownership by non-locals. They would like the two situations to be separated.

*"We would like the Council to give [a grant] to us bone fide businesses who aren't second homes and who do pay business rates, and not make us wait any longer"*

Self catering, North

*"Why are we put into the same box as people with second homes?"*

Self catering, North

## **Ongoing financial support if the summer season is missed**

- 7.25 Some operators already expect this year to be a 'write-off'. The date of 26 September is quoted by some as the earliest date for when they were advised to take bookings. Some see this as an indication that the industry will miss the summer season. If this is the case, they will need significant further financial support to survive – not only the summer, but the winter also as they rely on summer income to cover the lean winter months.

*“The problem is not getting through the next three months. The £25,000 grant will pay the reduced bills through that period. It's the winter months that are going to be the killer. That's when we'll need support.”*

Serviced, Mid

# Wales Tourism Business Barometer 2020: Covid-19 Impact Wave 3

Sector Which of the following best describes your business?

Serviced accommodation..... ☐

Self catering..... ☐

Caravan / campsite ..... ☐

Hostel..... ☐

Museum ..... ☐

Attraction ..... ☐

Activity operator ..... ☐

Restaurant / pub / cafe ..... ☐

Q1 Which of the following best describes the current situation of your business / attraction?

We are open ..... ☐

We have been open in 2020 but are currently closed due to the Covid-19 outbreak..... ☐

We still haven't yet opened in 2020 ..... ☐

Q2 *Museums and attractions*

Is your attraction free or paid entry?

Free entry ..... ☐

Paid entry ..... ☐

Q3 How many permanent paid staff does your business employ, excluding the proprietors?

None ..... ☐

1 ..... ☐

2 ..... ☐

3 ..... ☐

4 ..... ☐

5 ..... ☐

6 to 10 ..... ☐

11 to 50 ..... ☐

51 to 100 ..... ☐

101 to 250 ..... ☐

More than 250..... ☐

Q4 Do you have any volunteers working for/with you?

Yes ..... ☐

No..... ☐



Q5 How many seasonal workers would you normally employ at this time of year?

- None ..... ☐
- 1 ..... ☐
- 2 ..... ☐
- 3 ..... ☐
- 4 ..... ☐
- 5 ..... ☐
- 6 to 10 ..... ☐
- 11 to 50 ..... ☐
- 51 to 100 ..... ☐
- 101 to 250 ..... ☐
- More than 250..... ☐
- Don't know..... ☐

Q6 *If any seasonal workers normally employed*

If any, how many seasonal workers have you been able to employ this year?

- None ..... ☐
- 1 ..... ☐
- 2 ..... ☐
- 3 ..... ☐
- 4 ..... ☐
- 5 ..... ☐
- 6 to 10 ..... ☐
- 11 to 50 ..... ☐
- More than 50 ..... ☐

*Please specify how many*

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Q7 *If seasonal workers normally employed*

How many of your seasonal workers were employed before 19th March and are therefore eligible to be furloughed in line with the Chancellor's update on 15th April?

- Not applicable - none were employed before 19th March ..... ☐
- 0 ..... ☐
- 1 ..... ☐
- 2 ..... ☐
- 3 ..... ☐
- 4 ..... ☐
- 5 ..... ☐
- 6 to 10 ..... ☐
- 11 to 50 ..... ☐
- 51 to 100 ..... ☐
- 101 to 250 ..... ☐
- More than 250..... ☐
- Don't know..... ☐

Q8 *If staff (Q3 or Q5)*

What impacts has your business experienced from Covid-19 regarding staff since the start of the outbreak?

- Shortage of staff due to illness and/or self-isolation ..... ☐
- Have had to make redundancies ..... ☐
- Have had to ask staff to take paid leave / be furloughed..... ☐
- Have had to ask staff to take unpaid leave ..... ☐
- Have had to ask volunteers not to come to work..... ☐
- No impact ..... ☐
- Not sure / too early to tell ..... ☐
- Other impact ..... ☐
- How many people have you had to make  
redundant? .....
- How many people have you had to furlough  
/ ask to take paid leave? .....
- How many people have you had to ask to  
take unpaid leave? .....
- (Other) Please specify other impact .....

Q9 Would you mind giving us an indication of how much revenue your business has lost so far due to the Covid-19 crisis?

- Haven't lost any revenue ..... ☐
- Up to £1,000 ..... ☐
- £1,001 - £2,500 ..... ☐
- £2,501 - £5,000 ..... ☐
- £5,001 - £10,000 ..... ☐
- £10,001 - £25,000 ..... ☐
- £25,001 - £50,000 ..... ☐
- £50,001 - £100,000 ..... ☐
- £100,001 - £250,000 ..... ☐
- £250,001 - £500,000 ..... ☐
- £500,001 - £1,000,000..... ☐
- More than £1,000,000 ..... ☐
- Don't know or refused ..... ☐

Q10 *If any revenue lost*

And roughly what proportion of your normal annual revenue does that loss represent so far?

- 2% or less..... ☐
- 3 - 5% ..... ☐
- 6 - 10%..... ☐
- 11 - 15%..... ☐
- 16 - 20%..... ☐
- 21 - 30%..... ☐
- 31 - 40%..... ☐
- 41 - 50%..... ☐
- 51 - 60%..... ☐
- 61 - 70%..... ☐
- 71 - 80%..... ☐
- Over 80% ..... ☐
- Don't know or refused ..... ☐

Q11 *If any staff employed (Q3 or Q5)*

The Welsh Government Economic Resilience Fund opened for applications on Friday 17th April. Have you tried to apply for support?

- Yes, but don't meet the eligibility criteria ..... ☐  
Yes, have submitted an application for micro-business grant..... ☐  
Yes, have submitted an application for SMEs / large business grant ..... ☐  
No..... ☐

Q12 *If don't meet the eligibility criteria*

For what reason(s) do you not meet the eligibility criteria?

- Can't demonstrate a high enough loss of turnover ..... ☐  
Pursuing another form of Welsh Government non-repayable grant funding support ..... ☐  
Can't demonstrate that efforts have been made to sustain business activity ..... ☐  
The business rates grant we're getting from UK Government via the local authority is already higher than, or would be a large proportion of, the value of support we would get from the Welsh Government..... ☐  
Already getting business rates holiday, and so thought we couldn't apply..... ☐  
Business has not been operating for long enough ..... ☐  
Not VAT registered ..... ☐  
Other ..... ☐

*Please specify other*

Q13 *If submitted an application*

Do you know the outcome of your application yet?

- Yes – we have been successful ..... ☐  
Yes – but we have been unsuccessful ..... ☐  
No – we are waiting ..... ☐

Q14 *If not tried to apply yet*

Do you intend to apply?

- Yes ..... ☐  
No ..... ☐  
Don't know..... ☐

Q15 *If don't intend to apply*

Why don't you intend to apply?

- Don't expect to be successful ..... ☐  
Don't need the support ..... ☐  
Too confusing / don't know how to ..... ☐  
Haven't really looked into it yet ..... ☐  
Other ..... ☐

*Please specify other reason*

Q16 *If don't expect to be successful*

For what reason(s) do you not expect to be successful in applying?

- Can't demonstrate a high enough loss of turnover ..... ☐
- Pursuing another form of Welsh Government non-repayable grant funding support ..... ☐
- Can't demonstrate that efforts have been made to sustain business activity ..... ☐
- The business rates grant we're getting from UK Government via the local authority is already higher than, or would be a large proportion of, the value of support we would get from the Welsh Government..... ☐
- Already getting business rates holiday, and so thought we couldn't apply..... ☐
- Business has not been operating for long enough ..... ☐
- Not VAT registered ..... ☐
- Too many other businesses applying ..... ☐
- Don't know how to make a strong application ..... ☐
- Other ..... ☐

*Please specify other reason*

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Q17 *All*

And are you eligible for a business rates holiday?

- Yes ..... ☐
- No ..... ☐
- Don't know ..... ☐

Q18 Have you or your business applied for any of the following support?

	Yes	No	Don't know
Development Bank of Wales Loan Scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UK Government business interruption loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business rate grant of up to £10,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business rate grant of up to £25,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Universal credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-employment scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q19 *If applied*

Was your application successful?

	Yes	No	Don't know yet
Development Bank of Wales loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UK Government business interruption loan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business rate grant of up to £10,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business rate grant of up to £25,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Universal credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-employment scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q20 What is the earliest month from now when your business has a substantial number of bookings?

- May..... ☐
- June..... ☐
- July..... ☐
- August..... ☐
- September..... ☐
- October..... ☐
- November..... ☐
- December..... ☐
- Beyond 2020..... ☐
- Don't have substantial bookings in any month..... ☐
- Don't take advance bookings..... ☐

Q21 How many more months do you think your business can survive for during lockdown, taking into account government schemes announced to date?

- Less than 1 month..... ☐
- 1 month..... ☐
- 2 months..... ☐
- 3 months..... ☐
- 4 months..... ☐
- 5 months..... ☐
- 6 months..... ☐
- More than 6 months..... ☐
- It all depends on certain factors..... ☐
- Don't know..... ☐

Q22 *(If it depends)*

What does the survival of your business depend on the most?

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Q23 After lockdown measures are relaxed and tourism businesses can receive visitors again, do you have any medium to long term concerns about the survival of your business?

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Q24 Visit Wales is a part of Welsh Government. What kind of information or support regarding Covid-19 would you welcome from them if possible?

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Q25 *(If not already answered 'yes' to rates in Q17)*

Does your business pay non-domestic rates?

- Yes..... ☐
- No..... ☐
- Don't know..... ☐

Q26 (If not already known from previous answers)

And is your business VAT registered?

Yes ..... ☐

No ..... ☐

Don't know ..... ☐

Q27 Is your business graded or accredited by any of the following?

Yes – Visit Wales ..... ☐

Yes – AA ..... ☐

Yes – UK Museum Accreditation Scheme (Arts Council) ..... ☐

Yes – other ..... ☐

None of the above ..... ☐

(Other) Please specify other accreditation  
scheme

Q28 Finally, the research findings are circulated on the Visit Wales industry newsletters. If you have not already signed up to receive these, would you like to?

Yes ..... ☐

No ..... ☐

Already signed up ..... ☐