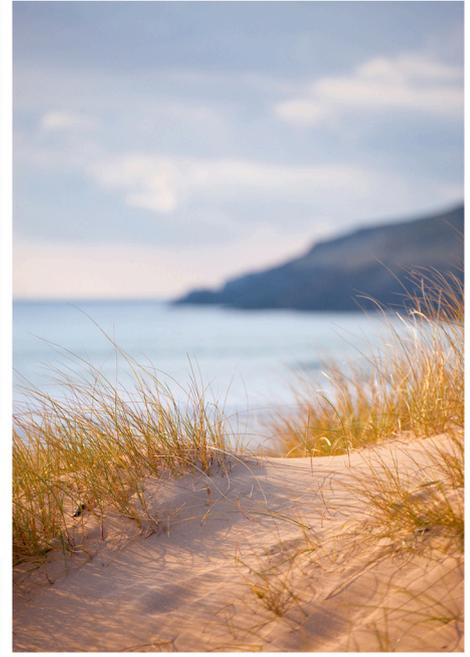


# Wales Tourism Business Barometer 2021

## Covid-19 Impact Wave 6 Report



SOCIAL RESEARCH NUMBER:  
35/2021  
PUBLICATION DATE:  
MARCH 18, 2021



Digital ISBN: 978-1-80195-055-8

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# Wales Tourism Business Barometer 2021: Covid-19 Impact Wave 6 Report.

Anthony Lydall, Strategic Research and Insight



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

For further information please contact:  
Research and Insights Team  
Visit Wales  
Economy, Skills and Natural Resources Group  
Cathays Park  
Cardiff  
CF10 3NQ

Email: [tourismresearch@gov.wales](mailto:tourismresearch@gov.wales)

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ISBN: 978-1-80195-055-8  
March 18, 2021  
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## 1. **Headline Findings**

### **Two thirds taking advance bookings**

- 1.1 About two thirds (65%) of businesses are taking advance bookings, knowing that there is not yet a confirmed date for their sector to reopen. The taking of bookings is most prevalent in the self catering sector – most (78%) are doing so.

### **Advance booking levels for this year are currently well down on normal**

- 1.2 One in ten (10%) operators taking bookings say they have more advance bookings than they would normally have at this point in the year, and 23% have about the normal level.
- 1.3 However, two thirds (67%) are down on normal. Of these, 90% cite ‘people being cautious about booking’ unprompted as a reason. Some believe this is because Wales does not yet have a clear ‘roadmap’ of reopening dates. This uncertainty seems to be affecting booking levels around Easter, which is often the first very busy period of the year for the tourism industry. Currently among businesses taking bookings, the average booked occupancy for April is approximately 21%.

### **But the summer is looking more positive, and some expect a domestic tourism boom**

- 1.4 Among businesses taking bookings, the average booked occupancy for August is approximately 42%. Among operators with higher than normal levels of advance bookings for this year, 63% say unprompted that ‘people are desperate to get away’, and 39% say that UK visitors are booking in Wales instead of abroad. Longer stays being booked seems to be an emerging trend.
- 1.5 Due to past experience during this pandemic, some operators expect a sudden rush of enquiries as soon as reopening dates are announced. As last summer’s barometer survey showed however, the ability of the industry to capitalise on any boom in domestic demand, should it happen, will depend largely on the operating capacity deemed appropriate and Covid-safe at the time.

### **Survival in the meantime**

- 1.6 43% of businesses expect to survive for longer than the next six months, 10% say they can only survive for less time, 32% say ‘it depends’ and 15% don’t know.
- 1.7 Some of those whose survival does not yet feel secure state that the industry needs to reopen before the summer, and for some, sooner than that. Alternatively, they report that they need continued access to government financial support.

## 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 sixth wave to research the impact of the Covid-19 pandemic on the tourism industry.

### How was the Survey conducted?

- 2.3 We have conducted 801 interviews by telephone. This makes results of questions asked to everyone accurate to  $\pm 3.5\%$ . The sample is broadly 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	92	35	71	50	248
Self-catering	93	56	116	62	327
Caravan / campsites	49	27	30	9	115
Hostels	4	4	2	4	14
Attractions	12	4	12	6	34
Activity operators	22	8	11	7	48
Restaurants / pubs / cafes	4	4	6	1	15
<b>Total</b>	<b>276</b>	<b>138</b>	<b>248</b>	<b>139</b>	<b>801</b>

- 2.4 77% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, attractions and activity operators, where grading is not applicable. Due to lockdown, it has been much harder than usual to reach operators in the restaurants / pubs / cafes, hostels and attractions sectors. This means that extra caution should be taken when viewing results by these individual sectors this wave.
- 2.5 All telephone interviews have been conducted with business owners or managers between 15<sup>th</sup> and 26<sup>th</sup> February.

### 3. Impact of Covid to Date

#### Furloughing staff

Total no. employed	Av. staff furloughed <i>(Base: all businesses which employ staff)</i>
1	0.5
2	1.1
3	1.6
4	2.2
5	3.8
6 – 10	6.0
11 – 50	22.3
Over 50	87.5
Overall	9.2

Base: 801

#### Increase in staff currently on furlough

- 3.1 On average, 9.2 people per tourism business employing staff are currently furloughed. This is much higher than in the previous wave (Sep 2020), when the average was 2.8.
- 3.2 The furlough scheme has kept a lot of jobs and businesses going, allowing for the retention of skills.

*“All our staff are on flexi furlough now. They do one day a week. We’ve been paying them 100% of their wages because they’re so specialised in what they do. Staff like that aren’t easy to find so we decided to top up the extra 20%.”*

Activity provider, South East

*“If furlough continues, we’re able to keep all of our staff”*

Hostel, North

## Loss in revenue

<b>Q3 “... how much revenue did your business lose in 2020 due to the Covid-19 crisis?”</b>	
Haven't lost any revenue	3%
Up to £2,500	0%
£2,501 – £5,000	5%
£5,001 – £10,000	10%
£10,001 – £25,000	26%
£25,001 – £50,000	23%
£50,001 – £100,000	17%
£100,001 – £250,000	10%
£250,001 – £500,000	4%
£500,001 – £1,000,000	1%
More than £1,000,000	2%
<i>Base</i>	569

*The above results exclude those not knowing or preferring not to answer this sensitive question*

### Lost revenue for 2020 averages in the £25,000 – £50,000 range

3.3 The median loss per business in 2020 lies at the lower end of the £25,000 to £50,000 bracket. In the last survey in 2020 (September), the median year-to-date loss at that point lay towards the top end of £10,000 to £25,000. That survey was conducted just as local lockdowns were coming into force, and before Wales' and England's national lockdowns in October and November effectively ended the industry's chances of clawing back lost revenue in the autumn.

*“We started to build a good reputation for ourselves and then it was all gone when we went back into lockdown [in the autumn]”*  
Café, South West

### High losses in the serviced sector

3.4 Sample sizes for most sectors are not large enough to compare reliably due to so many not able or willing to answer the question. However, the losses in the self catering sector do not seem as high as in the serviced sector. The median loss for self catering businesses was about in the middle of the £10,000 – £25,000 range, whereas the median loss for serviced

businesses was around £50,000. Looking at employee numbers, the difference is partly explained by difference in size of businesses.

*“I had to sell my house to afford to have my business”*  
Serviced, Mid

3.5 The median loss per business differs by size of business. The table below shows the approximate median loss per business by no. of employees:

No. of permanent paid staff	Approx. median range loss in revenue in 2020
None	£10,000 to £25,000
1 – 5	£50,000 to £100,000
6 – 10	£100,000 to £250,000
11 – 50	£250,000 to £500,000
More than 50	Over £1,000,000

3.6 The table below shows the proportion of normal annual revenue lost by those who lost any revenue:

<b>Q4 “And roughly what proportion of your normal annual revenue does that loss represent?”</b>	
<16% loss	-
16 – 20% loss	2%
21 – 30% loss	2%
31 – 40% loss	7%
41 – 50% loss	15%
51 – 60% loss	18%
61 – 70% loss	14%
71 – 80% loss	18%
Over 80% loss	24%

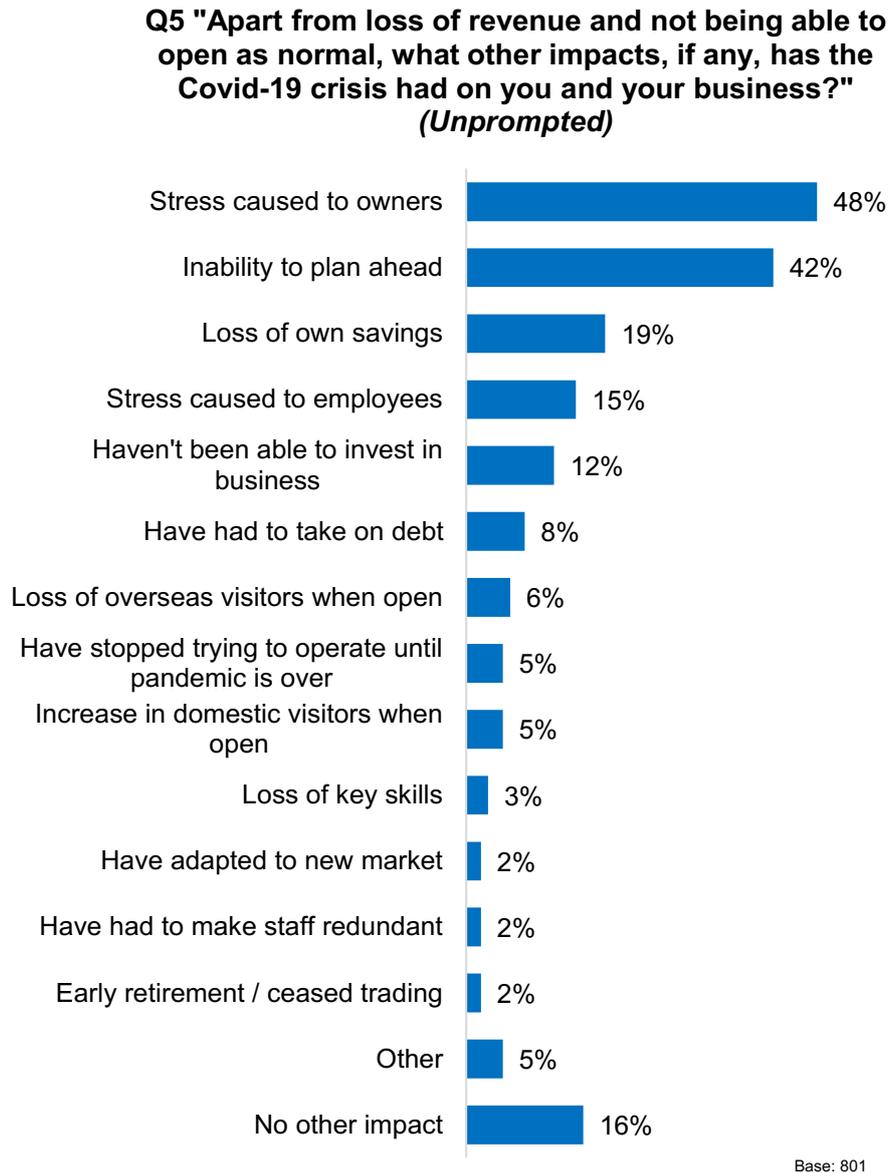
Base: 508

**About two thirds of normal revenue lost in 2020**

3.7 The median reported loss in 2020 as a result of the crisis was 61 – 70% of normal revenue. Around a quarter of businesses lost over 80% of the normal annual revenue.

3.8 As with Q3, sample sizes by sector are mostly not sufficient to compare results reliably, except for the serviced and self catering sectors. The median loss of annual turnover for self catering businesses was about 60% of normal revenue, whereas for serviced business it was over 70%. Comments in the last wave showed that some self catering businesses clawed back income in the summer from previously postponed / cancelled bookings.

## Further impacts



## Very stressful time to be running a tourism business

3.9 As well as the direct financial impact, the pandemic has taken a significant toll on the mental health of many tourism business owners. Around one in five (19%) have lost savings of their own trying to keep their business afloat. Owners in North Wales seem to have been particularly hard hit by stress – 60% have stated this.

*“It's a family run business, which is the only reason we've been able to keep going. It has caused a lot of stress, rows and arguments.”*

Serviced, North

*“I have had to take antidepressants”*

Serviced, North

- 3.10 It seems that one reason why the stress levels in the industry are not even higher than they are is because many owners do not depend solely on tourism income. This does not mean that the owners have not been impacted by the stress, but it does make a difference that their whole livelihood is not under threat.

*“Our business can survive indefinitely because it's just pocket money for us. Our earning and livelihood don't depend on it.”*

Self catering, Mid

### **Inability to plan**

- 3.11 About two in five (42%) say they are or have been affected by the inability to plan ahead. Currently, the lack of a firm 'roadmap' for Wales is making it hard for some operators to know what to do with enquiries.

*“I do have a lot of emails regarding bookings but just not sure what to say to them as we do not have any reopening dates”*

Caravan park, South West

### **Delays to improvements**

- 3.12 Some operators have not been able to invest in the business as they normally might, due to lack of funds, too much uncertainty or shielding.

*“We need to do structural work but are afraid of having people in the building. It's delayed for a year. I'm 80 at the end of this year so I'm trying to avoid contact with anyone.”*

Serviced, North

### **Calling it a day**

- 3.13 The pandemic has driven some owners into earlier than planned retirement.

*“Caused early retirement from the B&B”*

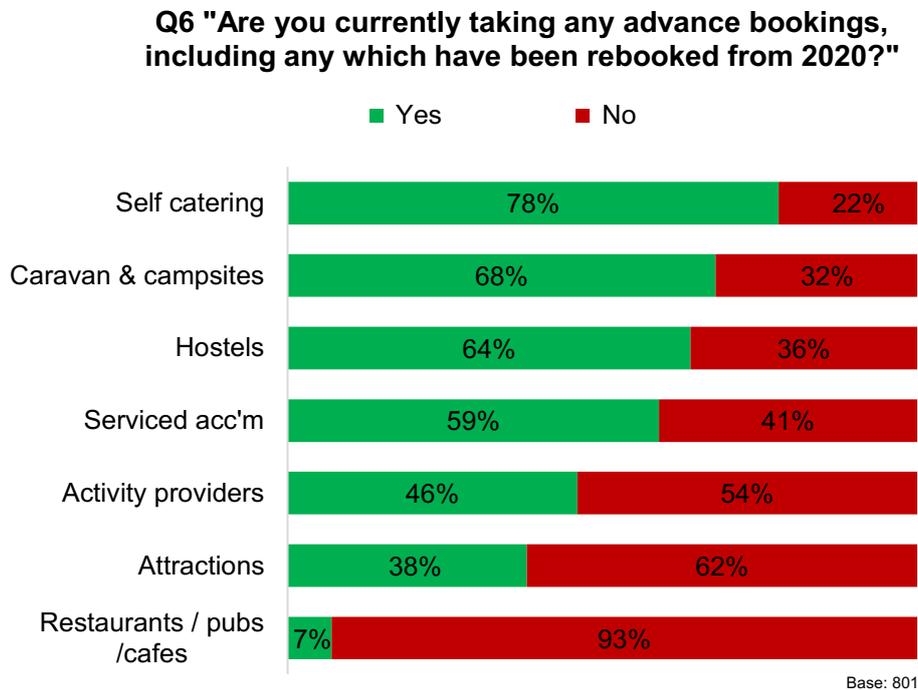
Serviced, Mid

*“We decided not to trade anymore and close the business. It caused us a lot of stress and we lost some of our own savings.”*

Serviced, South West

## 4. Future Bookings

### Taking bookings



#### About two thirds of businesses are taking bookings

4.1 At the time of writing, tourism businesses are under advice from Welsh Government that while they cannot yet reopen, they are allowed to take future bookings at their own risk. About two thirds (65%) are currently doing so, most notably in self catering, which is the most 'self contained' of all the accommodation sectors and likely to be at the front of the queue for reopening.

4.2 Some operators say they do not want the hassle of postponements, cancellations, rebookings, refunding deposits etc that they went through last year.

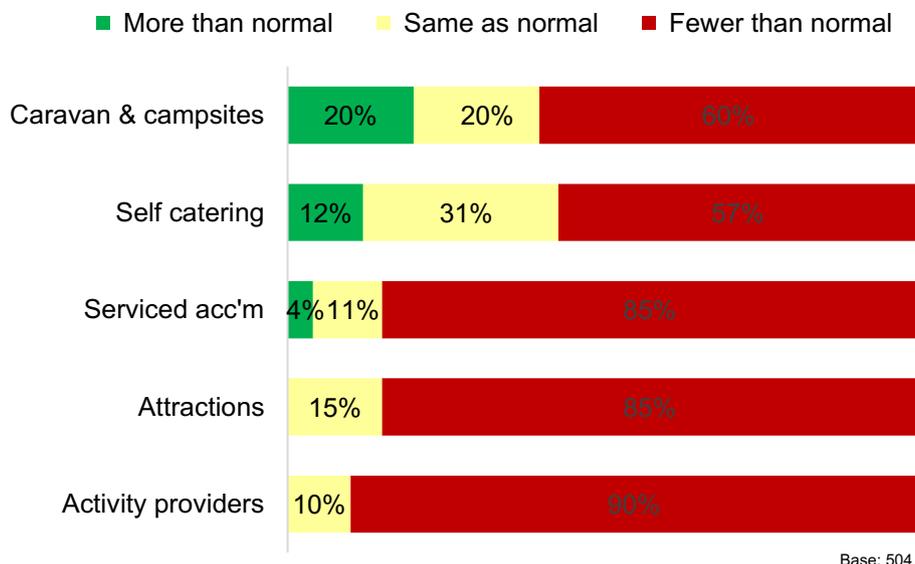
*"Last March we spent the entire month refunding people so I daren't put any availability out there, for fear of the same thing happening again"*  
Activity provider, Mid

*"I've currently closed bookings until I know exact dates from the government, so that I don't have to cancel them again and disappoint people."*  
Hostel, South East

4.3 By region, three in four (75%) North Wales operators are taking advance bookings. This compares to a lower proportion (50%) in South East Wales.

## Level of advance bookings

**Q7 "How many advance bookings do you have for 2021 compared to what you would normally have at this point in the year?"**



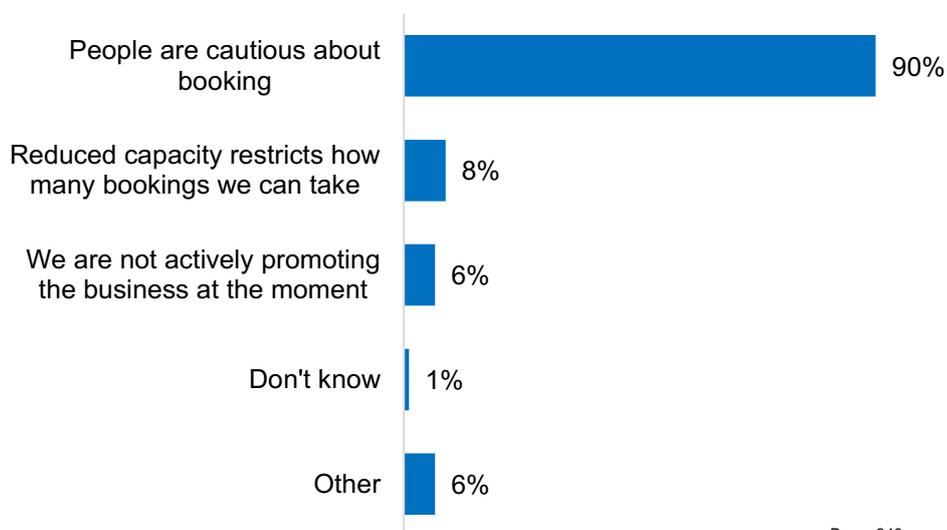
*Q7 has been asked to businesses taking advance bookings*

### **Two thirds of operators taking bookings say they are down on normal**

- 4.4 One in ten (10%) operators taking bookings say they have more advance bookings than they would normally have at this point in the year, and 23% have about the normal level. However, two thirds (67%) are down on normal. Advance bookings for all four regions of Wales are well down on balance. We discuss the reasons next under question 8.
- 4.5 The sectors where 'self containment' is easier – caravan & campsites and self catering – are the only sectors with a substantial number of businesses saying their advance bookings are up on normal. But even in these sectors, the balance is significantly down overall.

## Perceived reasons for advance bookings being down

Q8 "Why do you think you have fewer advance bookings than normal?" (*Unprompted*)



Base: 340

### Consumers holding off for now

4.6 With no definite reopening date for any sector at the time of interviewing, it appears that not many consumers are committing to booking yet.

*"People would have normally booked for Easter by now but no-one has. People are waiting to see what happens and have been stung by losing deposits already."*  
Serviced, North

*"People got fed up with postponing and ended up cancelling altogether. People are waiting to have the green light now before making bookings."*  
Serviced, North

### Lack of a clear 'roadmap' for Wales is felt to be stifling booking activity

4.7 Some operators with contacts in the industry in England say that tourism businesses there are benefiting from having clear dates, whereas booking activity in Wales is subdued due to no-one knowing reopening dates, and – also importantly – English visitors don't know when they will be allowed in.

*"Lots of people want to do stuff in April but Wales still isn't giving us a roadmap so the English are unsure as to whether or not they're able to travel to Wales."*  
Activity provider, Mid

*"We've got no concrete date. I think people are holding out until we get an exact date."*  
Caravan park, North

*“You speak to guesthouses in England and they've been getting reservations because there's more of an indication of a roadmap. That's what we're finding disappointing – that there's no roadmap in Wales. People are desperate to get away but they'll all go within England until we have some definite dates to reopen. I'm getting enquiries but can't tell them anything with confidence.”*

Serviced, North

### Loss of a particular market

4.8 Some operators are being hit hard by the extended delay in a particular important market returning. Examples include school trips for activity providers, and large weddings and work trips for serviced accommodation. These markets may well take longer to recover.

*“We used to have weddings for 250 people. Now it can only be 10.”*

Serviced, North

*“Schools are our biggest intake and most schools seem to be taking this year off”*

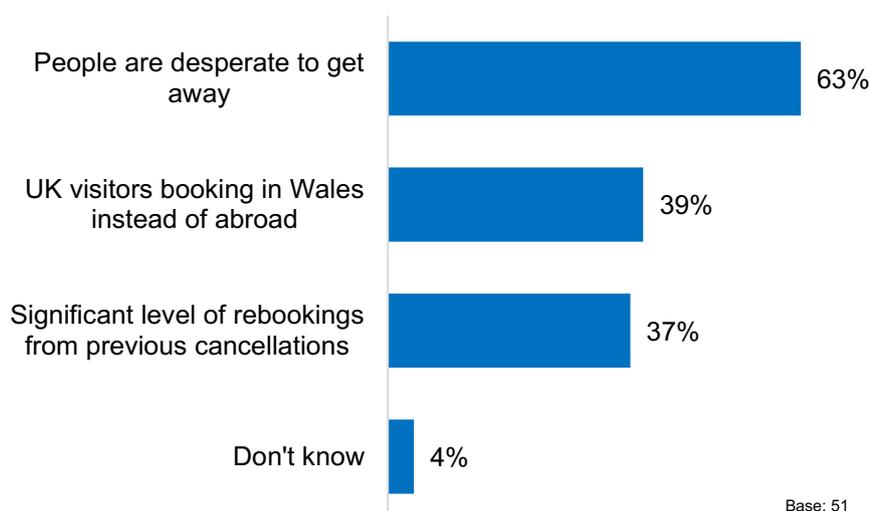
Activity provider, South West

*“Our business specialises in hospitality and accommodation for people with disabilities. This is the reason we think we're so quiet at the moment as our type of customers are going to be the last people to go anywhere during a pandemic.”*

Caravan park, South West

### Perceived reasons for advance bookings being up

**Q9 "Why do you think you have more advance bookings than normal?" (Unprompted)**



## Sign of what is to come?

- 4.9 Many operators who have received higher than normal levels of advance bookings are seeing the pent up demand to get away. And with international travel less certain in terms of restrictions or potential hassle than domestic travel, some operators are already seeing holidays being booked in Wales which would normally be taken overseas.
- 4.10 It remains to be seen whether the market will spring into life this year or not; the next research wave should give a clearer picture if and as lockdown restrictions ease.

*“The new bookings are provisional bookings; people putting out the feelers ... I think we're going to have a massive influx of bookings for June and July.”*

Activity provider, South West

*“They all rush to book when the First Minister gives a glint of hope and then all rush to cancel when he does the opposite. It's crazy.”*

Self catering, North

*“As we are still in lockdown, we are only pencilling people in until we know the reopening dates ... we are getting a load of enquiries though. People are very eager for holidays.”*

Caravan park, South West

*“Once we get the go-ahead to open, we're optimistic that we will be full every night – that's what happened last year. We were turning people away every day.”*

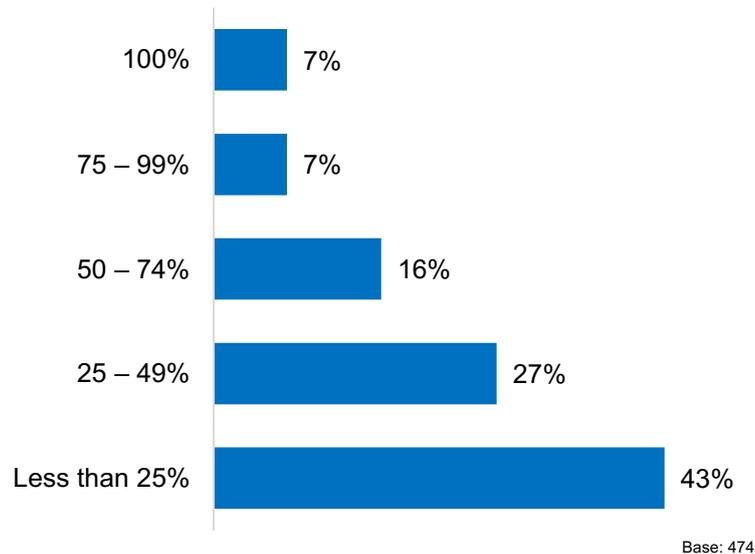
Caravan park, North

*“I feel that if we're open for this summer we will have a very good one as last year I could have booked my cottage ten times over with the amount of enquiries.”*

Self catering, South West

## Rebooking levels

Q10 "Roughly what proportion of your bookings are rebookings from previous cancellations?"



### Mix of rebookings and fresh bookings

- 4.11 2020 saw a lot of turmoil in terms of bookings getting rebooked for future dates, only then for some of those rebookings to get rearranged again as Wales and England went in and out of lockdown, often at short notice and not necessarily all areas at the same time.
- 4.12 The result is that 2021, when operators can eventually reopen, will see a mixture of rebooked trips and new bookings. Some even say that 2022 is starting to look that way also. The hassle is one of the reasons why some operators are not taking any new bookings until they know for sure when they can operate. Some suspect this is also a reason why they have not yet seen a flood of new bookings.

*"I've had to do a 2022 diary already for rebooking cancellations. I've never had to book that far ahead before."*

Self catering, Mid

*"Most bookings have been moved to March, April and May and I'm now having to transfer them again to 2022. One lady has been moved five times."*

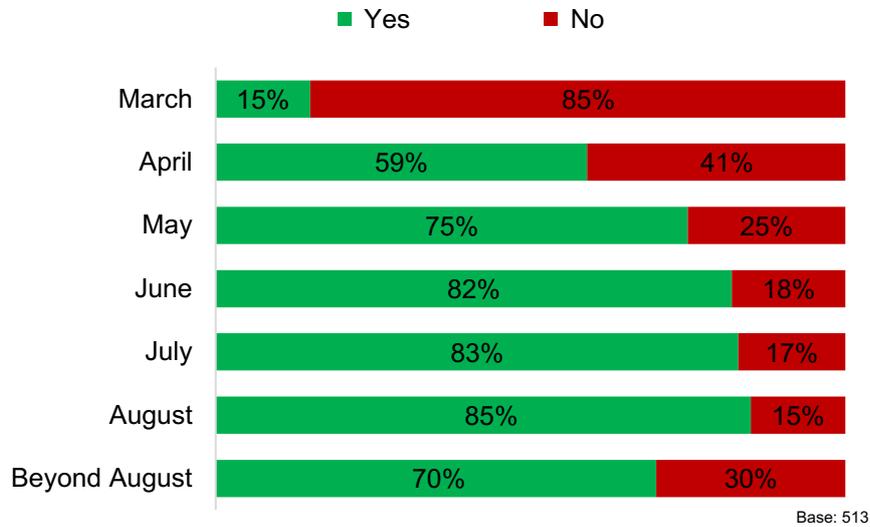
Serviced, North

*"It has been a booking nightmare with cancellations and rebookings – total confused chaos"*

Self catering, North

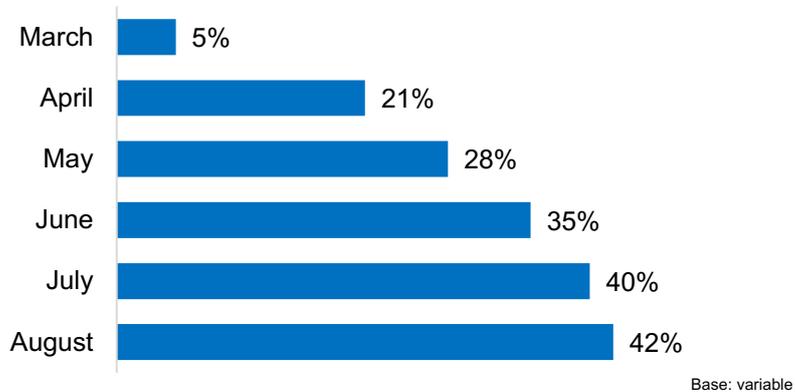
## Advance bookings by month

Q11 "For which months do you have bookings in 2021?"



Q12 "Approximately what percentage of your available capacity is booked for ... ? By 'available capacity' we mean the capacity level you're assuming you can operate at."

### Approx. booked occupancy levels shown



Q11 and Q12 have been asked to businesses which are taking bookings. 'Don't knows' are excluded from the results and the percents rebased.

### Fairly substantial bookings for the summer; much uncertainty until then

4.13 The closer in time towards the summer, the more occupancy operators have secured already. The immediate future – most notably Easter – is much more subdued as things currently stand. Existing bookings for the immediate future are quickly heading towards cancellation.

*"We're very busy for April but will have to cancel all of those bookings"*

Activity provider, North

*"I've spent the last two or three days changing dates, answering enquiries, cancelling and postponing bookings. People are so confused ... I've got two very long-standing Easter bookings but they both know it's questionable whether they will be able to come or not."*

Self catering, North

*"In the short term we've got fewer bookings but in the mid to long term, we've got more than usual."*

Serviced, North

*"England has given up on Easter. I hope Wales doesn't."*

Serviced, North

### **Differences by sector and region**

- 4.14 Booked occupancy levels are currently much higher in self catering than the serviced sector. At the peak in August, about 54% of bookable capacity in self catering has already been taken, compared to about 24% of bookable serviced capacity.
- 4.15 South West Wales is the most booked up of the four regions in the summer – peaking at around 49% in August. This is partly related to the large proportion of self catering operators in the region's sample.

### **Trend towards longer stays**

- 4.16 Some operators are noticing longer stays being booked for the summer, with some evidence that this is a replacement for the normal main holiday overseas. Some self catering operators also report that their booking agent is no longer allowing short stays.

*"Our agent is only taking week-long stays rather than shorter breaks this year"*

Self catering, North

*"One family usually stays with us for two weeks and goes abroad for the second half of July but they've booked with us for the whole month"*

Caravan park, North

*"People are booking for longer, so 5 – 7 days as opposed to 3"*

Self catering, Mid

*"There were lots of last minute, short breaks last year but this year people are booking a week, even two weeks for a proper holiday"*

Self catering, North

*"The main thing is that people can't go abroad and everyone wants to go on holiday"*

Caravan park, North

## **Lots of people are asking about refund policies**

4.17 Some operators say the first thing that enquirers ask about is whether they will not lose any money if Covid rules mean their trip has to be cancelled. Operators are generally either agreeing to refund deposits if necessary, or are not asking for deposits in the first place. Last year caused a lot of stress for operators refunding deposits.

*“Everybody that’s enquiring is asking about refunds”*  
Caravan park, North

*“People are asking about our cancellation policies. At the moment, we’re offering refunds if the home address of our visitor or our own address has been put under lockdown by the government.”*  
Self catering, Mid

*“People are reluctant to commit. They aren’t sending their 20% deposit. We have to be fair and change our deposit policy.”*  
Self catering, North

## **Increase in family bookings**

4.18 Some operators are seeing an increase in families making bookings, including extended families.

*“We’ve seen more extended family bookings. This is possibly to do with families not being able to see each other over Christmas.”*  
Self catering, South West

*“I’ve got a lot more people wanting to stay longer, more like 5 days rather than 3. More families want to book as well.”*  
Serviced, South West

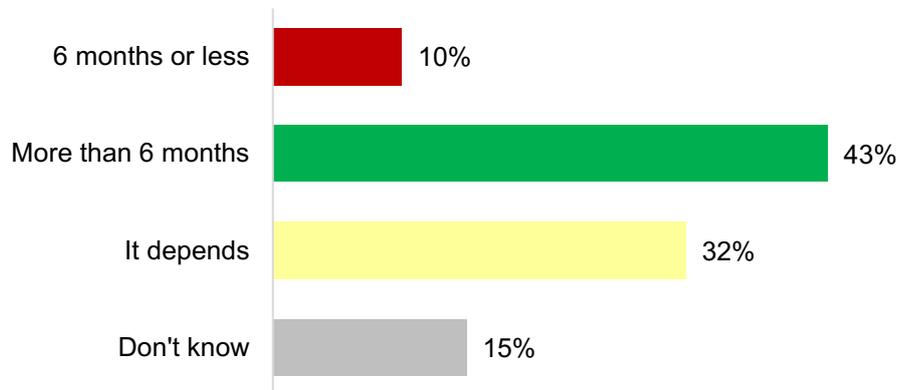
## **Timing of reopening tourism sectors relative to each other is an important consideration**

4.19 Some businesses feel they are at or near the front of the queue for reopening, but they won’t be able to benefit from reopening until attractions and places to eat also reopen in their area.

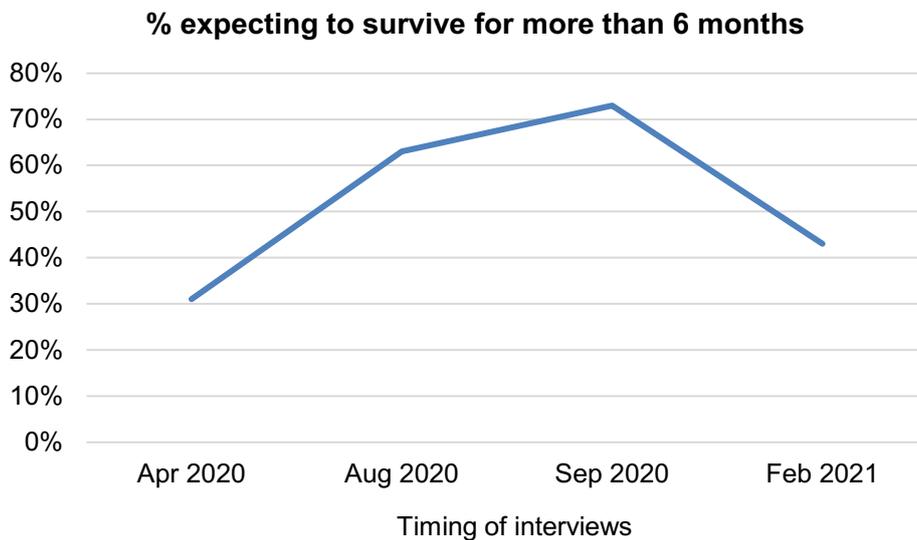
*“If they let serviced accommodation open first, but not the pubs and restaurants, then people won’t want to come. We might as well stay closed ... I noticed that we were very quiet until 10th August last year, but as soon as the pubs opened, the bookings came in.”*  
Serviced, North

## 5. Survival and Outlook

**Q14 "How many more months do you think your business can survive?"**



Base: 801



### **Survival outlook is less certain than in the previous wave**

5.1 43% of businesses expect to survive for longer than the next six months. This is a much lower proportion than in September (73%), with many businesses now in the 'it depends' group. Optimism peaked in the late summer / early autumn, when most businesses were open and receiving income from customers.

### **Need to reopen by the summer; some say earlier**

5.2 Survival for many depends on when they can reopen. The tourism industry can't afford another shortened summer, and some say they need the income sooner. Otherwise, more government finance – which has been greatly appreciated so far – is needed.

*“If things open up then we could survive, but if we aren’t up and running in June then we won’t be viable any longer”*  
Activity provider, South East

*“We couldn't have survived without the government's financial support and in the future if there's no positive development with this pandemic, we'll once again depend on what government funding is available”*  
Attraction, South East

*“It's only because of the funding I've received that I'll be able to get through this”*  
Activity provider, South West

*“If we're not open in the next four months, we're done. We had a big cash reserve and it's all gone.”*  
Attraction, South East

*“We are incredibly grateful for the help we had from Gwynedd Council and the Welsh Government. Without that we would have had to sell the business.”*  
Self catering, North

### **Some particular types of business have large and unavoidable overheads**

5.3 Financial support, especially the furlough scheme, has kept many businesses afloat. However, some have major ongoing costs that they can't avoid and are not covered sufficiently by grant money; they also need their staff to work. Examples include certain types of attraction or activity provider housing animals which need feeding or historic buildings and grounds which need maintaining. These types of business have been particularly hard hit by the crisis because they cannot just be 'mothballed'.

*“The grants are not sufficient for the area I'm in – the equestrian world. I need my staff to be working. The horses still need to be fed. Our overheads are massive.”*  
Activity provider, South East

### **Some won't be moved**

5.4 Some tourism businesses have been running for decades or have even passed through generations of the family. It will take a lot to make some operators give up the fight.

*“I've been here over thirty years and I'm damned if I'm going to let this thing close us down!”*  
Serviced, North

## Differences by sector

Expected length of business survival	Sector						
	Serviced acc'm	Self catering	Caravan / campsites	Hostels	Attractions	Activity providers	Rest'rnt / pubs / cafes
Up to 6 months	14%	8%	6%	14%	9%	15%	7%
More than 6 months	32%	52%	40%	14%	35%	56%	53%
It depends	36%	27%	37%	43%	41%	21%	27%
Don't know	18%	13%	17%	29%	15%	8%	13%
<i>Base:</i>	<i>248</i>	<i>327</i>	<i>115</i>	<i>14</i>	<i>34</i>	<i>48</i>	<i>15</i>

- 5.5 The self catering sector sees income from advance bookings as time progresses towards the summer. The serviced sector does not yet have the same level of advance bookings, and this is reflected in the more uncertain outlook among operators. But this could change quickly.

*"We are just waiting for the flood gates to open when we are given the green light"*  
Serviced, North

# Visit Wales Barometer Questionnaire

Sector Which of the following best describes your business?

- Serviced accommodation.....
- Self catering.....
- Caravan / campsite .....
- Hostel.....
- Museum .....
- Attraction .....
- Activity operator .....
- Restaurant / pub / cafe .....

Q1 How many permanent paid staff does your business currently 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.....

Q2 *If staff employed*

And how many permanent paid staff are currently on furlough?

- None .....
- 1 .....
- 2 .....
- 3 .....
- 4 .....
- 5 .....
- 6 to 10 .....
- 11 to 50 .....
- 51 to 100 .....
- 101 to 250 .....
- More than 250.....

Q3 Would you mind giving us an indication of how much revenue your business lost in 2020 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 .....

Q4 And roughly what proportion of your normal annual revenue does that loss represent?

- 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 .....

Q5 Apart from loss of revenue and not being able to open as normal, what other impacts, if any, has the Covid-19 crisis had on you and your business?

*Unprompted*

- Have had to make staff redundant .....
- Stress caused to owners .....
- Stress caused to employees .....
- Inability to plan ahead .....
- Haven't been able to invest in the business .....
- People working here have caught the virus .....
- Have stopped trying to operate until the pandemic is fully over .....
- Have adapted to new market (e.g. accommodating health workers, tourists who have to quarantine, disabled visitors etc) .....
- Loss of own savings .....
- Have had to take on debt .....
- Increase in domestic visitors during periods of being open .....
- Loss of overseas visitors during periods of being open .....
- Loss of staff to other sectors / loss of key skills .....
- Other .....
- No other impact .....

*(If staff made redundant)*

How many staff have you had to make  
redundant?  
*(Other)*

*Please specify other impact(s)*

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Q6 Are you currently taking any advance bookings, including any which have been rebooked from 2020?

- Yes .....   
No.....

Q7 *If taking bookings*

How many advance bookings do you have for 2021 compared to what you would normally have at this point in the year?

- More than normal .....   
About the same as normal .....   
Fewer than normal .....   
Don't know.....

Q8 *If fewer than normal*

Why do you think you have fewer advance bookings than normal?

*Prompt if necessary*

- We are not actively promoting the business at the moment .....   
People are cautious about booking .....   
Reduced capacity restricts how many bookings we can take .....   
Don't know.....   
Other.....

*Please specify other*

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Q9 *If more than normal*

Why do you think you have more advance bookings than normal?

*Prompt if necessary*

- Significant level of rebookings from previous cancellations.....   
People are desperate to get away .....   
UK visitors booking in Wales instead of booking abroad.....   
Don't know.....   
Other.....

*Please specify other*

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Q10 *If taking bookings*

Roughly what proportion of your bookings are rebookings from previous cancellations?

- 100%.....
- 75 - 99%.....
- 50 - 74%.....
- 25 - 49%.....
- Less than 25% .....
- Don't know.....

Q11 *If taking bookings*

For which months do you have bookings in 2021?

	Yes	No	Don't know
March	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
May	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
June	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
July	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beyond August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q12 Approximately what percentage of your available capacity is booked for ... ? By 'available capacity' we mean the capacity level you're assuming you can operate at.

*Months routed from answers to above*

	Less than 10%	11 - 25%	26 - 50%	51 - 75%	76 - 99%	100%	Don't know
March	<input type="checkbox"/>						
April	<input type="checkbox"/>						
May	<input type="checkbox"/>						
June	<input type="checkbox"/>						
July	<input type="checkbox"/>						
August	<input type="checkbox"/>						

Q13 *If taking bookings*

Are there any booking trends you're noticing for 2021 that are different from normal?

*(Prompt if necessary: different type of visitor (e.g. more or fewer older people), longer or shorter stays, more in advance / more last minute etc, queries about cancellation policies etc)*

*Interviewer: record also any useful comments about taking or not taking bookings*

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Q14 How many more months do you think your business can survive?

- 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.....

Q15 Interviewer: record any useful comments made during the interview

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