

## Latest Visit Wales Research

### Visit Wales weekly [Tourism Consumer Tracker Week 13](#): 10-14 August

Visit Wales are working with VisitBritain and VisitScotland to extend the current BVA BDRC survey to focus on demand for holidays in the short-medium term

UK-level findings are published weekly on the VisitBritain website [here](#). Wales-focused reports are published every 4 weeks on the Welsh Government [website](#), and include data on Wales residents and UK residents intending to visit Wales.

#### UK resident findings:

- The proportion of U.K. adults feeling that the worst is still to come dropped from 51% to 46% this week. 60% believe things won't return to 'close to normal' before April '21
- Confidence in taking a domestic trip later in the year (between October – December) has increased to 41% following last week's dip in sentiment, but remains lower than week 11 and prior weeks
- 28% have either already taken a domestic trip since the start of July or intend to do so before the end of September – a slight decrease compared with Week 12.
- 42% of summer intenders have not yet planned their next UK trip, and 53% have not yet booked. Only 11% of winter intenders have already booked their trip.
- Wales is the 4<sup>th</sup> most popular destination choice among summer intenders, and 5<sup>th</sup> most popular choice among winter intenders.

### Visit Wales [Tourism Business Barometer](#)

#### Wave 4: 27 July - 6 August

N=801 Wales tourism businesses, telephone survey

#### Key findings:

- Overall, about three quarters (78%) of businesses are open. The comfortable majority in every sector are open, apart from attractions, where only just over half (53%) are open. Adapting to Covid-19 measures is the main reason for many attractions not yet being open.
- About half (51%) of those open are operating at full capacity. The self catering sector differs greatly from the other sectors – 80% of open self catering businesses are fully open. 43% of open serviced accommodation is fully open, whereas only a quarter (25%) of open businesses in other sectors are fully open.
- 11% of open businesses have had more customers since reopening than they would normally have at this time of year, and 45% have had the same level. However, 44% have had fewer customers than normal.
- The level of bookings compared to normal correlates strongly with open capacity. 13% of fully open businesses have had more customers than normal, 63% have had the same level and 24% have had fewer. This compares to 9% of partially open businesses having more customers than normal, 25% having the same level, and 66% having fewer.

- 13% of businesses open or planning to reopen have more bookings than normal for August and September, 46% have the same level and 41% have fewer. This correlates strongly with opening capacity. Among those operating at full capacity, 17% have more bookings than normal, 60% have the same level and 23% have fewer.
- 1% of businesses have made redundancies. Among the sample of 801 businesses, 22 full time permanent staff have been made redundant to date, and 5 part time permanent staff.
- The value of lost revenue as a result of the crisis varies considerably by size of business with 1% losing over £1m, overall, the median loss per business lies towards the top end of £10,000 to £25,000.
- Although the £ value of lost revenue to date differs greatly by size of business, the proportion of normal annual revenue the loss represents does not. Across all sizes of business, the median reported loss as a result of the crisis is 41 – 50% of normal revenue for the whole year. The picture is also fairly consistent across all sectors and regions.
- Just over half (54%) of businesses have signed up to the Good to Go industry standard. The proportion is highest among caravan & campsites (65%) and lowest among restaurants, pubs & cafes (31%). Differences by region are not significant.
- 7% of operators say they don't expect to survive longer than the next six months. In the previous survey in late April, the proportion was 33%.

*\*This summary document was last updated on 19-08-2020*

# Latest Consumer Research

## Welsh Government

### [Survey of public views on the coronavirus](#)

31 July – 5 August summary, Wales residents

- Perceptions of the threats posed by coronavirus are stable following some previous decline. It continues to be seen to pose a greater threat to the country than to individuals. Under half believe that someone close to them will be infected.
- A large majority in Wales continue to try to keep two metres away from others when out, but less than half are now only leaving home for essential journeys.
- The Welsh public continue to think the coronavirus pandemic will have a personal financial impact on them. Around a quarter are concerned they will not be able to pay their bills one month from now.

## Department for Transport

### [Transport use during the coronavirus pandemic](#) 12 August (GB / England data)

- To monitor the use of the transport system during the coronavirus (COVID-19) pandemic, DfT provides statistics on transport use by mode, published every Wednesday.
- Car use is at similar levels to pre-lockdown, cycling levels are higher, rail and bus usage remains suppressed.

## Tracking Consumer Sentiment on the Impact of COVID-19 [Week 20 Report](#) 13 August

August

- The proportion who have eaten in a restaurant since June increases more quickly since the start of August, coinciding with the discount Eat Out to Help Out scheme launching.
- Other indoor activities including going to shopping malls, the cinema and a gym saw lead times rise since the end of July. Average lead time for a cinema trip is now 4.4 months, up from 3.4 months a week earlier.
- 88% think a second wave and new lockdown is likely – an increase from 85% at the end of July.
- Lead times for taking a UK holiday remain level, at around 4 months until taking the trip on average, though some have already taken a trip this summer. Average time until planning the next trip is 3.1 months, and booking lead time is at 3.4 months.
- 13% had taken a UK holiday this summer.
- Lead times for overseas holidays rose, and average lead time before going on an overseas holiday was 6.7 months. Planning / booking times also rose for overseas holidays, to 5.3 and 5.5 months respectively. This rise coincides with announcements around additional countries being subject to a 14-day quarantine on return to the UK.
- Proportions intending to book hotel accommodation before the end of September dropped from 28% at the end of July to 16% in early August.
- Intention to book a flight before the end of September fell to 8%.

## STR: [Tourism & Travel in a New COVID-19 World](#) ([register](#) to read [full report](#))

Qualitative consumer online focus groups with UK-based members of the STR Traveller Panel

- In general, having a main holiday and additional shorter breaks was common. Accommodation was chosen to suit the needs of the trip, and all used a range of different types for different trips.
- Currently, there is a preference for local trips.
- There is much uncertainty, and many are not planning too far in advance.
- There were concerns about understanding local rules and guidelines as well as whether local communities would be welcoming to tourists.
- Those impacted financially are more likely to consider cancelling holidays. In general, higher prices were considered undesirable for affordability and value for money reasons.
- There is an increased preference for self-catering. Many are also reassured by trusted hotel brands or chains, though some thought smaller independent properties offered higher hygiene standards.
- Some safety measures were thought to impact negatively on visitor experience. Increased need to plan days out in advance put some off visiting attractions.

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## Latest Consumer Research continued

### Holiday intentions

**Office for National Statistics Opinions and Lifestyle survey** [5-9 Aug 2020](#)

- The number of UK adults likely / very likely to holiday in the UK this year was almost 3 in 10 (28%).
- Compared to less than 1 in 10 (9%) saying they were likely / very likely to holiday abroad this year.
- A third of adults (33%) in the UK said their household could not afford a one-week holiday this year. Almost 6 in 10 (59%) said they could afford this.
- 1 in 5 adults (20%) cancelled their travel plans because of the possibility of having to self-isolate for 14 days after travelling abroad.
- 14% decided to go on holiday in the UK rather than travel abroad, given the 14-day self-isolation requirements, and 1 in 5 (21%) said they were more worried about travelling abroad, though 8% said this had not affected their travel plans.
- Only 10% said they were likely / very likely to travel abroad with the possibility of having to self-isolate for 14 days on their return, and over 3 in 5 (62%) said they would be very unlikely to travel in that case.
- Almost 2 in 5 (39%) said they had no travel plans.

## Latest Industry Research

### **Wales Adventure Tourism Organisation (WATO): The Outdoor Adventure Activity Sector Barometer Survey** n = 80 WATO

members responded to an online questionnaire between 29 July – 7 August.

- 60% of the outdoor adventure activity organisations had opened by the 27 July
- Running capacity among open businesses was 45% on average compared to 2019, ranging from 10% to 100%.
- Staffing levels among open businesses was 57% on average, again, ranging widely from 10% to 100%.
- 10% had made redundancies or not employed temporary staff as usual.
- Most reported a decrease in bookings for the rest of the year compared to 2019.
- Reported revenue lost varied widely, from a few thousand pounds for sole traders, to several hundred thousand pounds for large centres.
- A third estimated their chance of survival to 2021 as low (50% or less). Two fifths estimated it as high (90% or more).
- 62% of businesses had received financial support including the government furlough scheme, Economic Resilience Fund, business rates relief, and Bounce Back Loans

### Events – pilot live events

**Outdoor music event:** [Sam Fender at Gosforth Park](#) 2,500 attended a socially distanced open-air concert

**West end theatre show:** [Beverley Knight at the Palladium](#) Audience of 640, operating at 30 per cent capacity in the 2,297-seat venue

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## Economic information resources

### **The Office for National Statistics (ONS) updates various data resources regularly:**

#### [Daily Coronavirus \(COVID-19\) roundup](#)

- A summary of coronavirus data and analysis produced by the ONS, updated daily, and containing links to each publication or data source

#### [Coronavirus and the economic impacts on the UK](#)

- Based on a new voluntary fortnightly survey, looking at the impact of COVID-19 on businesses

#### **Gross Domestic Product (GDP) Estimates for the UK:**

[Monthly estimate for June](#)

[Quarterly estimate for April to June](#)

#### [Coronavirus and the latest indicators for the UK economy and society](#)

- Experimental data using a variety of data sources to produce fast indicators

#### [Coronavirus and the social impacts on Great Britain](#)

- Using the Opinions and Lifestyle Survey to analyse COVID-19 impacts on people, households and communities.

#### [Retail sales](#)

- Retail sales estimates, with quantities bought and the amount spent on various categories and for retail and online.

#### [Consumer price inflation, UK](#)

- Price indices for the different measures of consumer price inflation.

#### [Labour market overview](#)

- Estimates of employment, unemployment and economic inactivity

“Early indicators for July 2020 suggest that the number of employees in the UK on payrolls is down around 730,000 compared with March 2020.”

#### **Other resources:**

**National Institute of Economic and Social Research:** [‘Premature’ end to furlough to push jobless rate to 10%](#) 28 July 2020

- Economic forecasting which predicts a 10% fall in UK GDP in 2020, followed by a 6% increase in 2021, and estimates 2019 GDP levels will not be regained until late 2023.

**Resolution Foundation** regularly publish reports looking at the [impact of coronavirus on the UK economy](#)