

The Outdoor Adventure Activity Sector Barometer Survey

CONDUCTED BY WALES ADVENTURE TOURISM ORGANISATION (WATO)
BETWEEN 29TH OF JULY ANT THE 7TH OF AUGUST 2020

Q1. Which Outdoor Providers Group are you a member of?

Region of Wales	
Pembrokeshire Outdoor Charter Group(PCF)	26.67%
South Wales Outdoor Activity Provider Group	26.67%
Snowdonia-Active	36.67%
Other (please specify)	16.67%

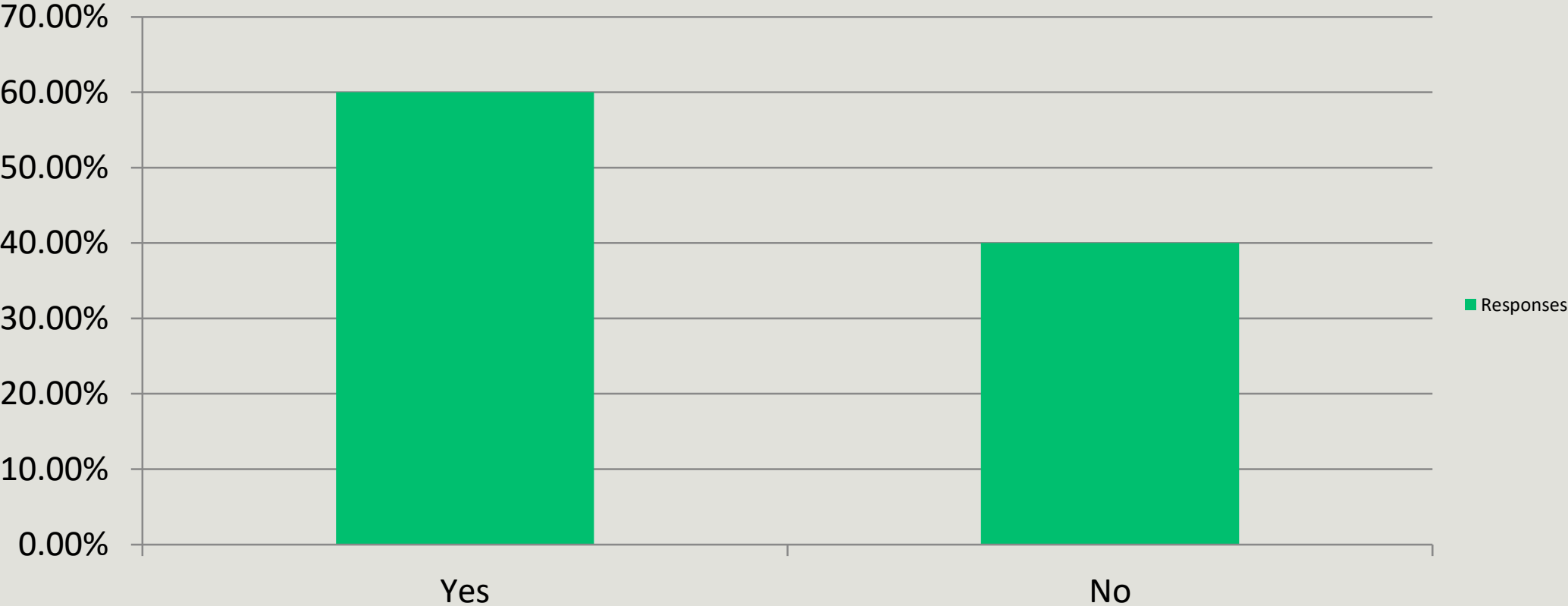
- BMC, IOL, Canoe Wales, LOtC, Global Adventure Challenges, Wales Coast Path walking providers association, Attractions of Snowdonia

Q2. What type of business do you run?

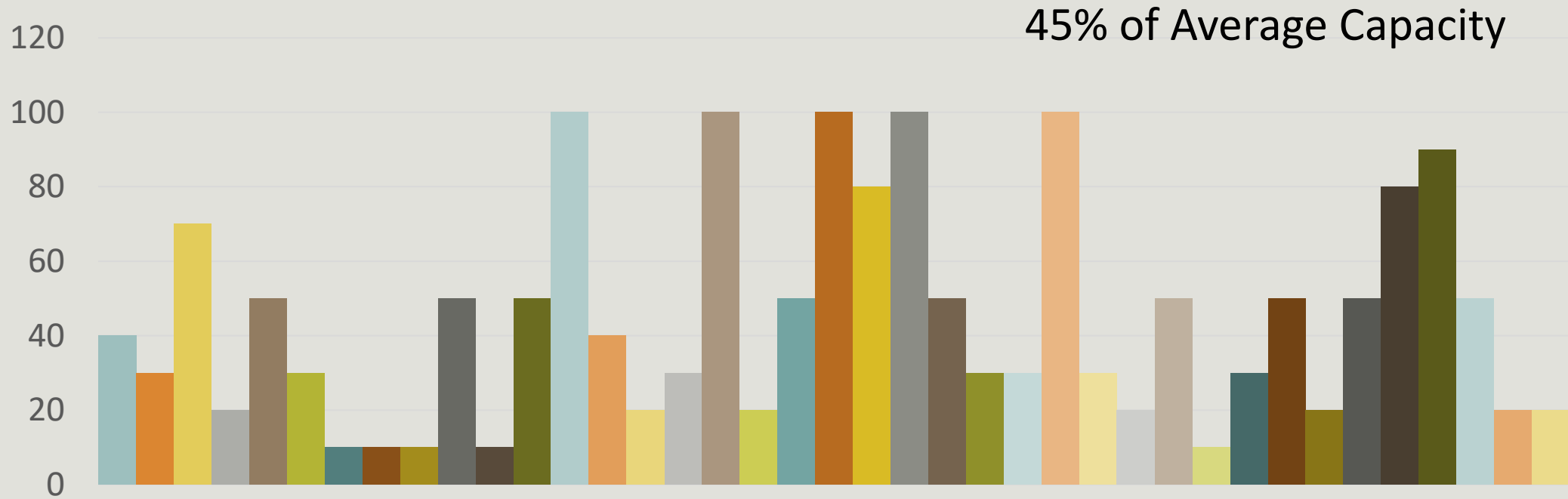
Answer Choices	
Freelance Instructor	15.00%
Sole Trader	31.67%
Business with 2-10 employees	35.00%
Business with 11-20 employees	8.33%
Business with 21 or more employees	3.33%
Other (please specify)	6.67%

- Education, Limited company with one employee , Environmental Not for a profit 2-10 employees, Business with freelance instructors

Q3. As of Monday 27th July, has your business opened and begun delivering activities?

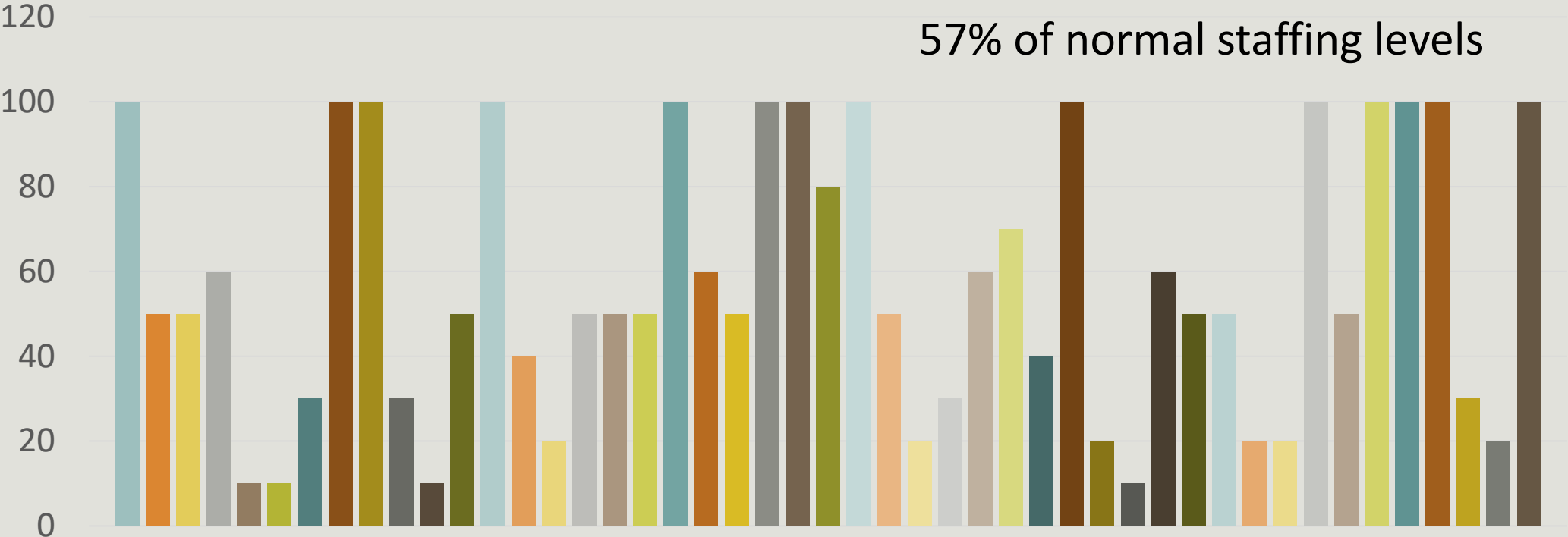


Q4. Compared to the same time in 2019, what capacity is your business running at?



(Of the 60 % of businesses operating the average % of normal capacity they are operating at is 45%)

Q5. Compared to the same time in 2019, what percentage of staffing levels are you running at?



(Of the 60 % Of businesses operating the average % of normal staff they are employing is 57%)

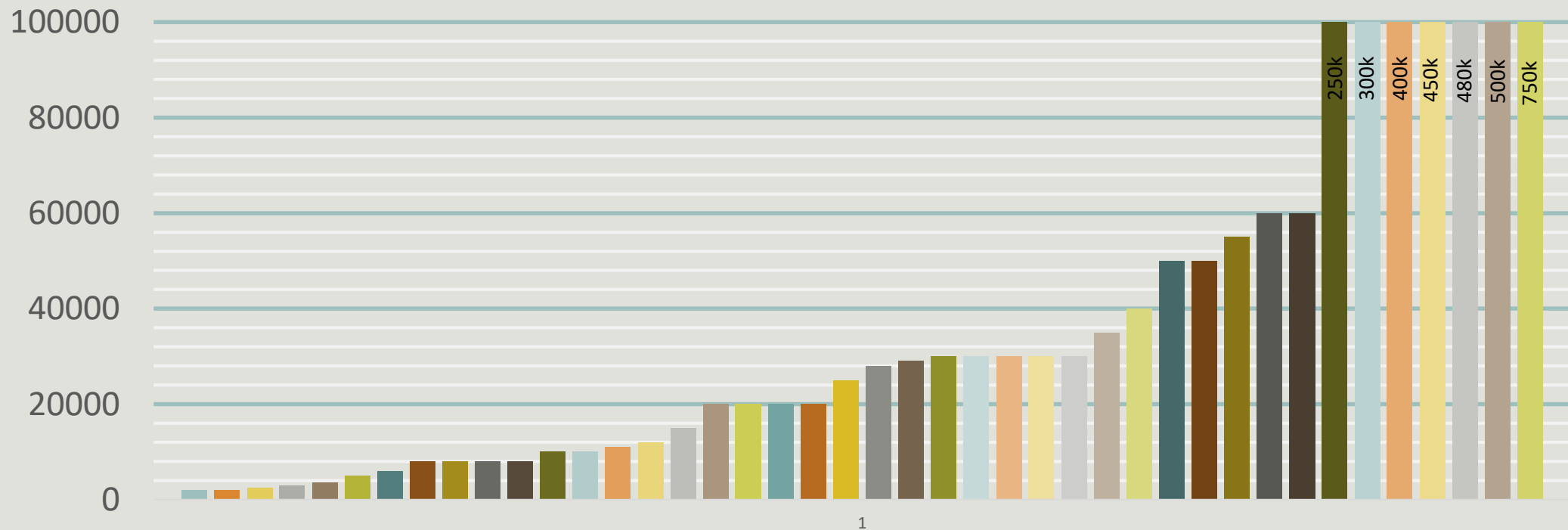
Q6. Have you been forced to make redundancies?

Yes	No
10%	90%

Q7. Please state how many redundancies

- 2
- Any casual or freelance staff who would have worked for me over the season.
- 2
- None, but I haven't employed a guide team this year either. Interviews were done, job offers made and accepted then lockdown and no job to go to. Technically not redundancies but also 8 people not employed by me this summer due to cv19.
- 2 contracts

Q8. How much revenue has your business lost to date?



A wide variety of revenue losses reported from a few thousand for a sole trader to several hundred thousand for large centres. Answers of 50%, 70%, 90%, were also provided.

Q9 . Has your business received financial support?

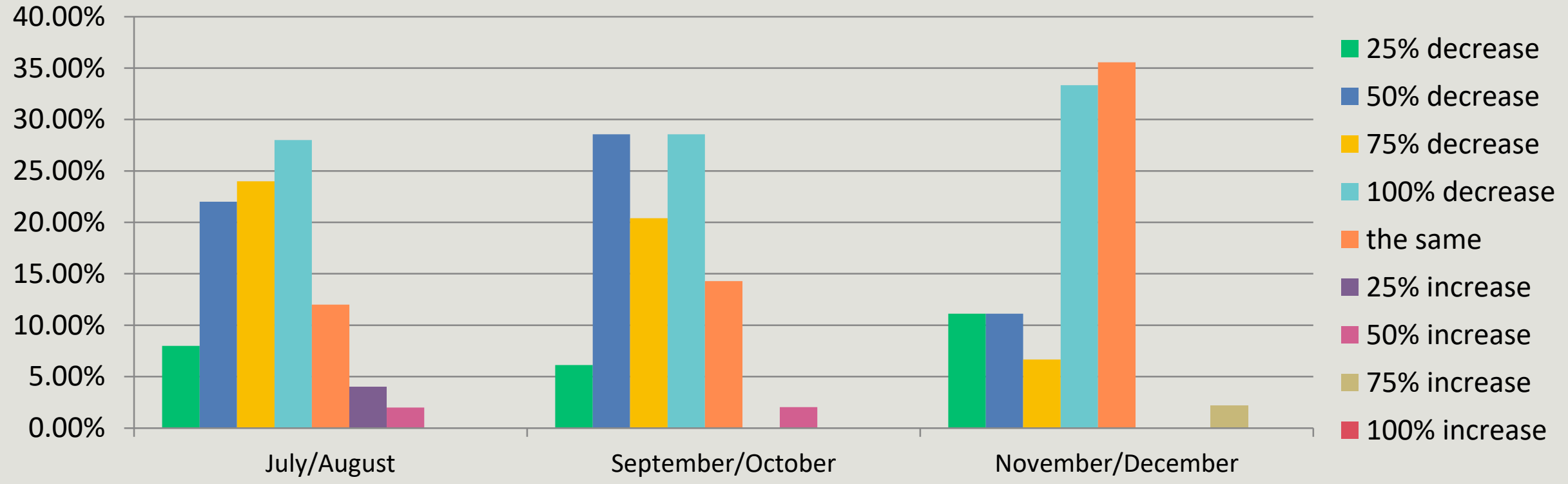
Yes	No
62%	38%

Q10. Please provide further detail in the comments box of financial support your business has received.

- Again a wide variety of support has been reported being received from furlough scheme, Economic Resilience Fund, business rates relief, to Bounce Back Loans

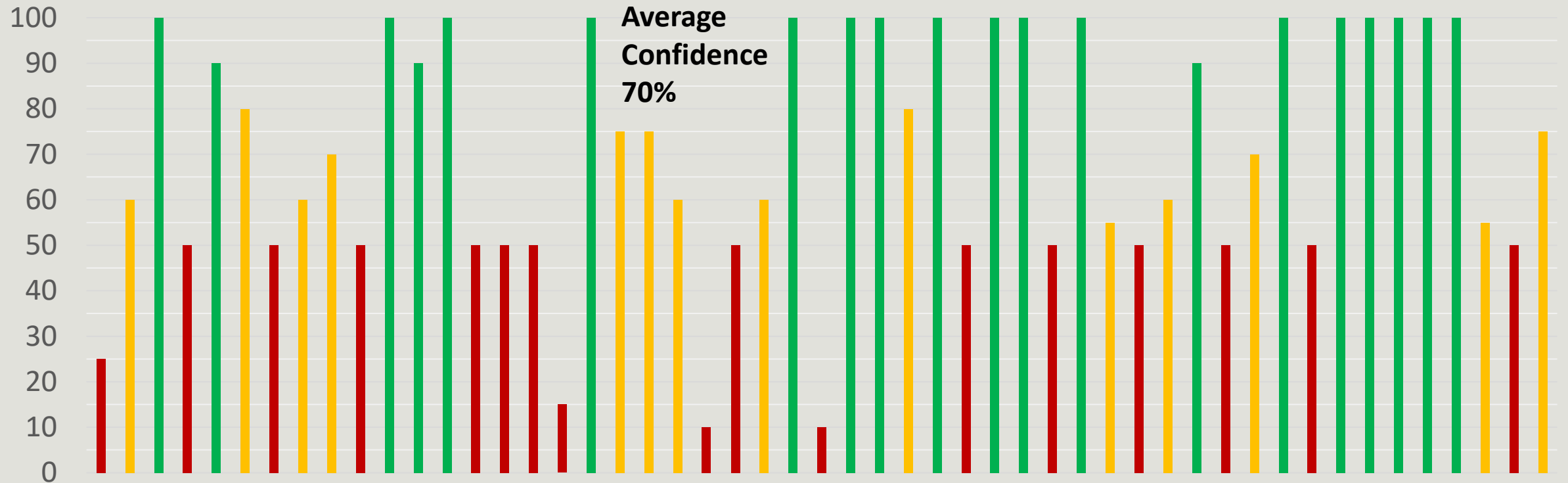
Q11. Compared with 2019, estimate your bookings now and into the autumn

% Decrease or Increase



A majority of businesses report below average booking in July & August with only 18% stating the same or better in July/August; 16% same or better in Sept/October; and 37% same or better in Nov/Dec

Q12 . Estimate your business' chances of surviving to be operating in 2021. (ie How confident are you in making enough this year to survive?)



33% of respondents had **low confidence** in surviving(50% or less)

27% had had **moderate confidence** in surviving (between 51% and 89%)

39% had **good confidence** in surviving(90% or More)

Q13 . Has your business participated in the 'We're Good to Go' scheme?

Yes	No
63%	37%

BAROD AMDANI
Dilys 2020

Safon Diwydiant COVID-19
Mewn partneriaeth â;
Sefydliadau Twristiaeth Cenedlaethol Prydain Fawr a Gogledd Iwerddon

I gydnabod bod y busnes hwn wedi cadarnhau ei fod wedi dilyn canllawiau COVID-19 y Llywodraeth a'r diwydiant, gan sicrhau bod prosesau ar waith i gynnal glanweithdra a chynorthwyo pellter cymdeithasol/corfforol.

WE'RE GOOD TO GO
Valid 2020

COVID-19 Industry Standard
In Partnership with;
The National Tourist Organisations of Great Britain and Northern Ireland

In recognition that this business has confirmed that they have followed government and industry COVID-19 guidelines, ensuring processes are in place to maintain cleanliness and aid social/physical distancing.

VisitEngland | tourism northernireland | Visit Scotland | Alba | Cymru Wales

Q14 . Does your business have needs other than financial to get back to operating as normal?

Yes	No
43%	56%

Q15. Please state what others needs other than financial are required. Key themes

- Need the Department for Education to change their statement advising against overnight education trip for schools.
- Relaxation of social distance laws
- Promotion / Marketing
- Qualified Staff
- Increase in consumer confidence

Q.15 Further general comments

- We can afford to keep our staff until January but are very concerned as to what we can do if we do not start full time work in February or March. Extend Furlough please or there will be no Outdoor Centres!
- It is desperately important that DfE advice for overnights is considered in line with schools reopening.
- Wales and England not having common policies on social distancing and households being able to meet indoors has been a major source of confusion for guests. - Also last minute notices on what the rules are going to be for businesses reopening are a major issue. - I started to plan to reopen my business when it was announced that self catering businesses could reopen. But then a couple of weeks later the rules were published, and I discovered that there was a limit of 1 extended household. which is too small to enable me to open profitably. So I had to cancel my plans to open.
- The shoulder season and financial support for keeping the workforce would be welcome as trying to diversify and the expenditure on preparing to make adjustments to the site bears a financial burden before even operations begin
- percentage of lost bookings is at about 90% for the July/August period. It's not 100% down as I am taking single families out myself.
- We focus on a very specialist activity provision that being school residential group sales. Unfortunately this is probably the hardest hit of the areas and we do not benefit from the opening up of tourism. Our future is based on changing the business model or schools feeling they can book trips with confidence, and us believing that they will be allowed to attend or if they do not attend (due to another lockdown or school restrictions nearer the time) there is some kind of financial support for this specialist educational sector. We cannot go through another season of having to give back 100% of all the monies received
- You have no way of knowing the post summer slump so the effect in the latter half of the year, or with a resurgence of lockdowns, it's anyone's guess despite you asking for % figures...