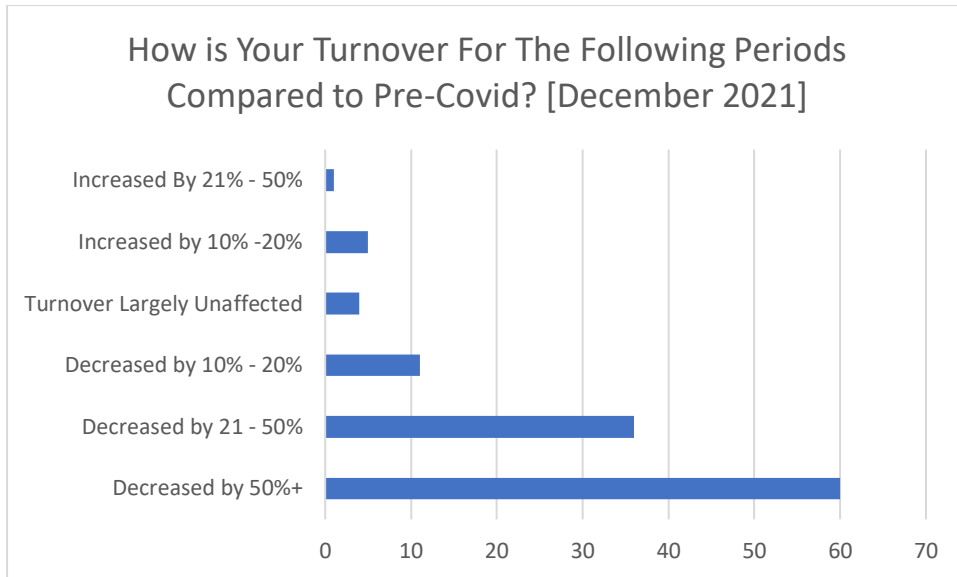
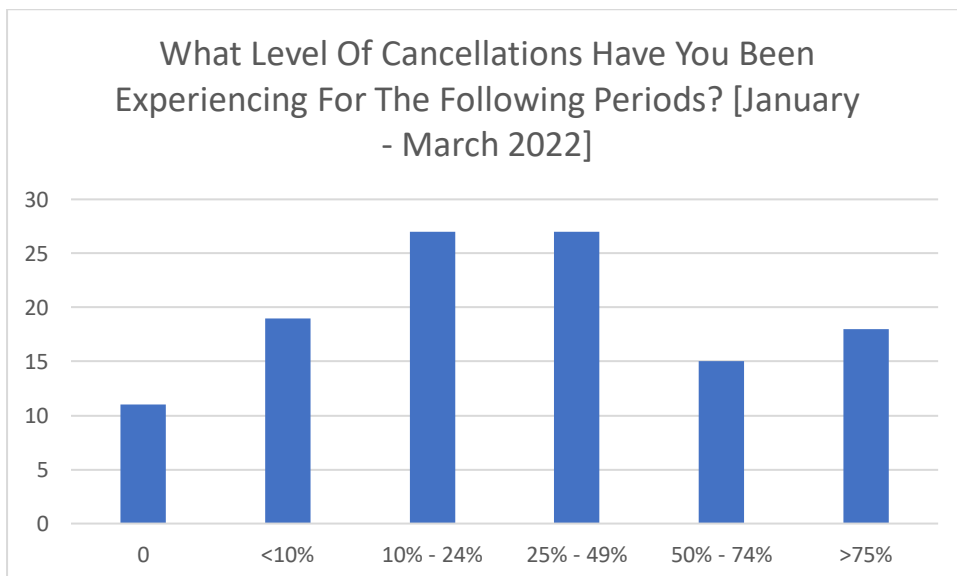


Analysis For Coach Operators

Number of responses - 117

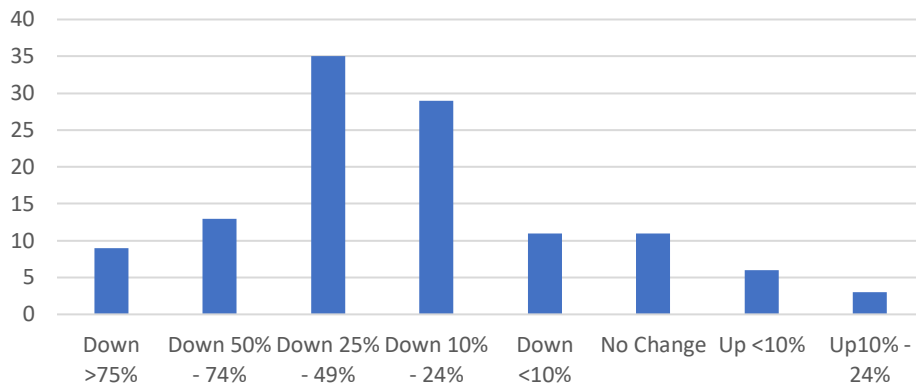


- 51% of businesses have seen revenue decline by over 50%
- 82% of businesses have seen revenue decline by over 20%
- **Tourism Industry Average**
52% of businesses have seen revenue decline by over 50%
74% of businesses have seen revenue decline by over 20%



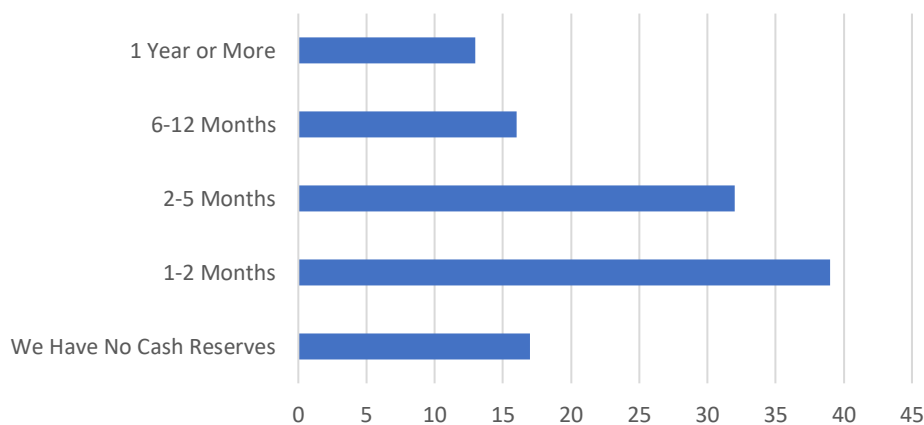
- 28% of businesses have had cancellation rates of over 50% for Q1 2022
- 51% of businesses have had cancellation rates of over 25% for Q1 2022
- **Tourism Industry Average**
29% of businesses have had cancellation rates of over 50% for Q1 2022
44% of businesses have had cancellation rates of over 25% for Q1 2022

What Level Of Bookings Have You Been Experiencing For The Following Periods Compared To Pre-Covid? [January - March 2022]

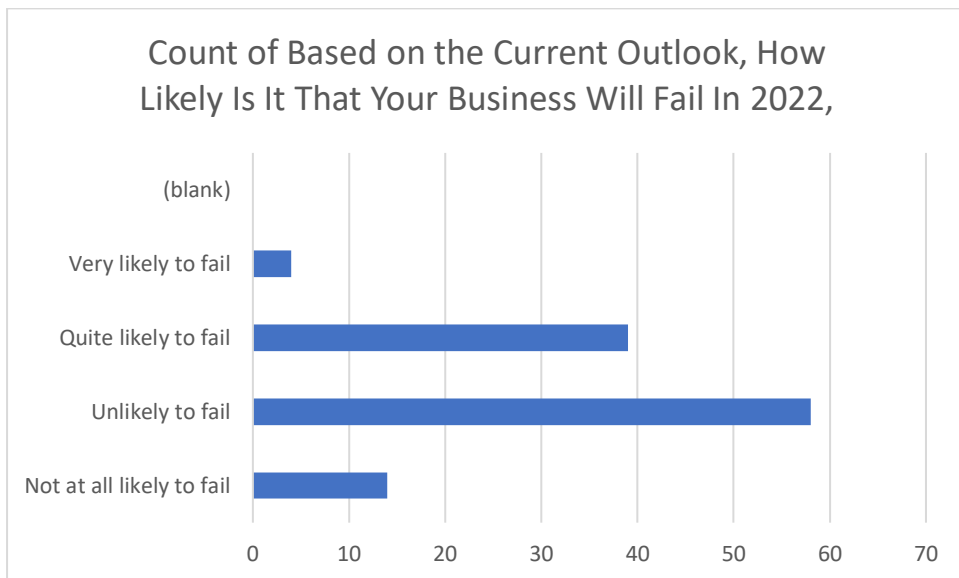


- 19% of businesses have booking levels more than 50% below pre-covid levels for Q1 2022
- 49% of businesses have booking levels at least 25% below pre-covid levels for Q1 2022
- **Tourism Industry Average**
24% of businesses have booking levels more than 50% below pre-covid levels for Q1 2022
49% of businesses have booking levels at least 25% below pre-covid levels for Q1 2022

How Many Months Of Cash Reserves Do You Have?



- 15% of businesses have no cash reserves
- 48% of businesses have less than two months cash reserves
- **Tourism Industry Average**
26% of businesses have no cash reserves
55% of businesses have less than two months cash reserves



- 3.8% of businesses are very likely to fail
- 37.4% of businesses are at least likely to fail
- **Tourism Industry Average**
11.2% of businesses are very likely to fail
40.8% of businesses are at least likely to fail

Measures Needed (Average Score where 0 = it would make little difference and 10= make a big difference)

MEASURE	SCORE	Industry Average
Additional Sector Specific Grants	8.6	8.0
Removing Covid Restrictions	7.2	7.0
Retaining the 12.5% VAT Rate	3.4	5.8
Greater Government Clarity On Rules	6.7	6.8
Government Funding for Marketing Campaigns	5.3	4.1
Reintroduction of Furlough	7.6	6.3
Government Reassurance On The Safety Of Travel	8.0	6.8