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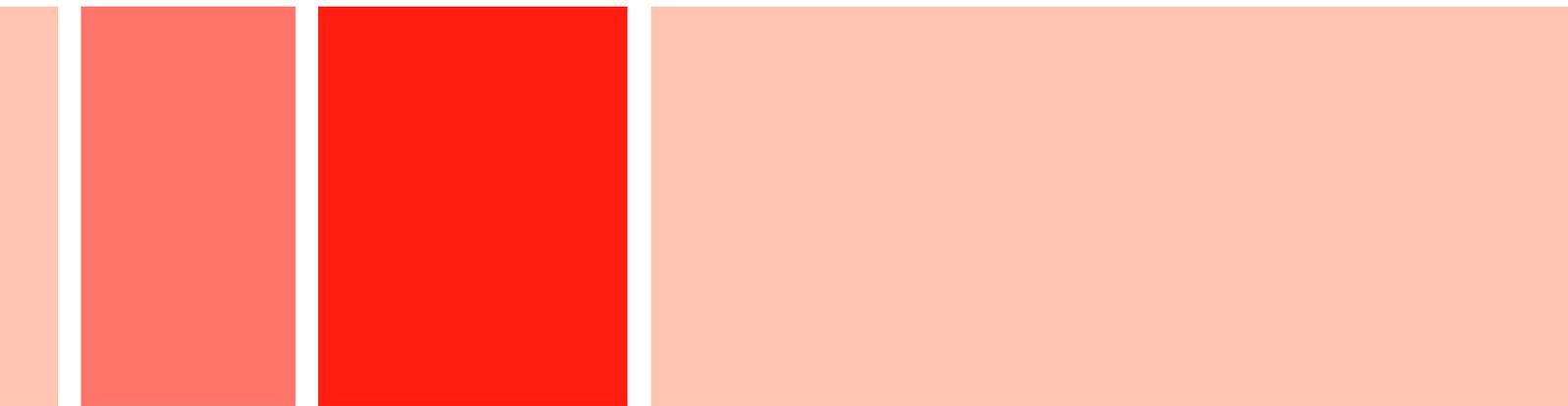
Number: 52/2014



Llywodraeth Cymru
Welsh Government

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Wales Tourism Business Survey Wave 1, 2014



Wales Tourism Business Survey – Wave 1, 2014

Research on behalf of Visit Wales

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beaufortresearch

30 years of intelligent research

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

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ISBN: 978-1-4734-1496-9

Welsh Government Social Research, 23 May 2014

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APPENDIX**SURVEY QUESTIONNAIRE**

KEY FINDINGS

Business confidence

- Around two fifths (44%) of all businesses established for longer than 12 months had received more guests/visitors this Easter compared to last Easter, while around one fifth (19%) reported they had received fewer. Guest/visitor numbers showed the greatest increase for caravans (55%) and attractions (51%) and the smallest increase for self-catering accommodation (32%).
- For businesses receiving more guests/visitors this year, better weather (55%), the later Easter (25%) and marketing efforts (7%) were felt to have contributed to the increase in numbers. On the other hand, for the 19% of businesses that had received fewer guests/visitors, the main causes were felt to be poor weather (28%), the economic climate (11%) and interestingly, the later Easter (7%).
- Closely linked to guest/visitor numbers, two fifths (43%) of businesses operating for longer than 12 months reported a higher turnover this Easter compared to last Easter, while 18% reported a lower turnover. Self-catering accommodation providers were most likely to have experienced lower turnover (23%), whereas caravans were most likely to have had higher turnover (55%).
- Most businesses were confident about the upcoming summer season (87%), with 35% of which were very confident and 52% fairly confident.

Research and market insights

- Two fifths of businesses had seen any research or market insights produced by Visit Wales (39%); the most frequently used format for accessing market insights and research was online via Visit Wales communication channels (80%), including the website, newsletters, emails or Twitter links.
- When asked to evaluate the market insights / research they had seen, businesses were fairly complementary. Ratings were most positive for the ease of understanding of the insights / research; two thirds (66%) gave a positive rating, with 23% giving a rating of 5 (very good), and a further 43% giving a rating of 4 (fairly good).
- Ratings were least positive for the relevance of the information to the business; 36% gave a rating of 4 or 5, while a quarter (25%) gave a negative rating of 1 (very poor) or 2 (fairly poor).

- Amongst the businesses that had **not** read any market insights or research reports produced by Visit Wales; a quarter of these stated that they did not have any time to read such material (23%). There was also a general lack of awareness of what information was available amongst a similar proportion (25%).
- The most popular format by far to receive information was via newsletters / e-newsletters (68%). Around a fifth of businesses wishing to see insights / research would like to receive report summaries (including Excel spreadsheets providing visitor numbers) and online videos (24% and 21% respectively).
- Most would like to receive these insights / research fairly regularly; four in five (80%) would like to receive information between one and three times each quarter, with 41% saying they would like monthly updates, and 39% saying they would like to receive information every three months. Moreover, two thirds would like this information to be provided all year round (66%).

Participation in market research

- Two in five (43%) of the businesses interviewed had taken part in research projects commissioned by Visit Wales, namely the Visitor Attractions Survey and the Visitor Occupancy Survey: 23% still took part, while 20% had participated in the past but no longer did so.
- Most of the businesses participating in these projects thought that it was important to take part in research in order to improve the information available and help the tourism sector in Wales (26% attractions; 16% accommodation). Conversely, most of those choosing **not** to take part reported that they had not been asked to do so (32% attractions; 19% accommodation).

1. INTRODUCTION AND OBJECTIVES

Since 2004, the Welsh Government has been running the Wales Business Tourism Survey. This research provides valuable insight into how tourism businesses in Wales are performing, along with their business outlook. The survey is composed of multiple waves of research per year and engages with a representative sample of accommodation and attraction businesses across Wales.

Of key importance is the ability of the project to provide *rapid response insight* following key holiday periods throughout the year. These insights provide early indications of business performance.

To achieve the required quick turnaround a strict timetable is adhered to for each wave of the survey. Fieldwork is scheduled to take place immediately following a given date – this report relates to the Easter holiday period.

The subject areas covered in Wave 1 of the Business Tourism 2014 survey are:



Business confidence

Number of guests/visitors this Easter compared to the previous year and confidence in the 2014 summer season



Market insight and research reports

Awareness and usage of the market insights and research reports produced by Visit Wales, along with research needs and participation in surveys

This report contains the main findings arising from the survey.

2. METHODOLOGY

The survey was conducted via telephone using CATI (Computer Assisted Telephone Interviewing) technology from the Beaufort Research dedicated interviewing unit. Interviews took around 5 – 6 minutes to complete and all respondents were offered the choice of conducting the interview in the language of their choice, English or Welsh. A total of 8% of the sample undertook the interview in Welsh; take-up of this option was highest in North Wales and Mid Wales (13% for each), and lowest in South East Wales, where none of the businesses interviewed conducted the interview in Welsh.

A total of **405 interviews** were conducted, and fieldwork took place between 28th and 30th April 2014. This report was produced on Thursday 8th May; the quick turnaround was due to the excellent response from the businesses that were eager and willing to take part.

The sampling universe for the research (which included ungraded as well as graded businesses) consisted of accommodation businesses in Wales known to Visit Wales (both provided by Visit Wales and sourced by Beaufort Research), plus all known tourist attractions in Wales (held by Beaufort Research). Businesses fell into one of four distinct business groups:

- Attractions
- Serviced accommodation
- Self-catering accommodation
- Caravan sites.

Businesses were also categorised according to region. The following Unitary Authorities were included in each of the four Welsh Government regions used for the analysis of the data:

North Wales	Mid Wales	South West Wales	South East Wales
Anglesey	Ceredigion	Carmarthenshire	Blaenau Gwent
Conwy	Gwynedd*	Neath Port Talbot	Bridgend
Denbighshire	Powys	Pembrokeshire	Caerphilly
Flintshire		Swansea	Cardiff
Gwynedd*			Merthyr Tydfil
Wrexham			Newport
			Monmouthshire
			Rhondda Cynon Taf
			Torfaen
			Vale of Glamorgan

* Please note that the Gwynedd UA spans two WG regions, North and Mid Wales, dependent on postcode sector.

A quota sampling approach was adopted, according to business type and region. The quotas imposed were consistent with those used in previous waves of the research, and resulted in a broadly representative profile of businesses being interviewed. The data was not weighted.

Table 1 below outlines the number of interviews conducted with each business group across each of the four Welsh Government regions.

Table 1 – interviews achieved by business type and region

Business Type	Region				TOTAL
	North	Mid	South West	South East	
Attractions	25	10	20	25	80
Accommodation – serviced	40	25	25	30	120
Accommodation – self-catering	40	25	35	20	120
Accommodation - caravans	26	26	25	8	85
TOTAL	131	86	105	83	405

It is important to bear in mind that this research is designed only to be an **early indicator of performance** in the Welsh tourism industry whilst the more detailed GBTS and IPS figures are usually prepared for release about six months later. The findings presented here are a summary of feedback from the trade, whereas the UKTS and IPS figures, when released, are designed to provide a more accurate picture.

3. MAIN FINDINGS

3.1 Business Confidence

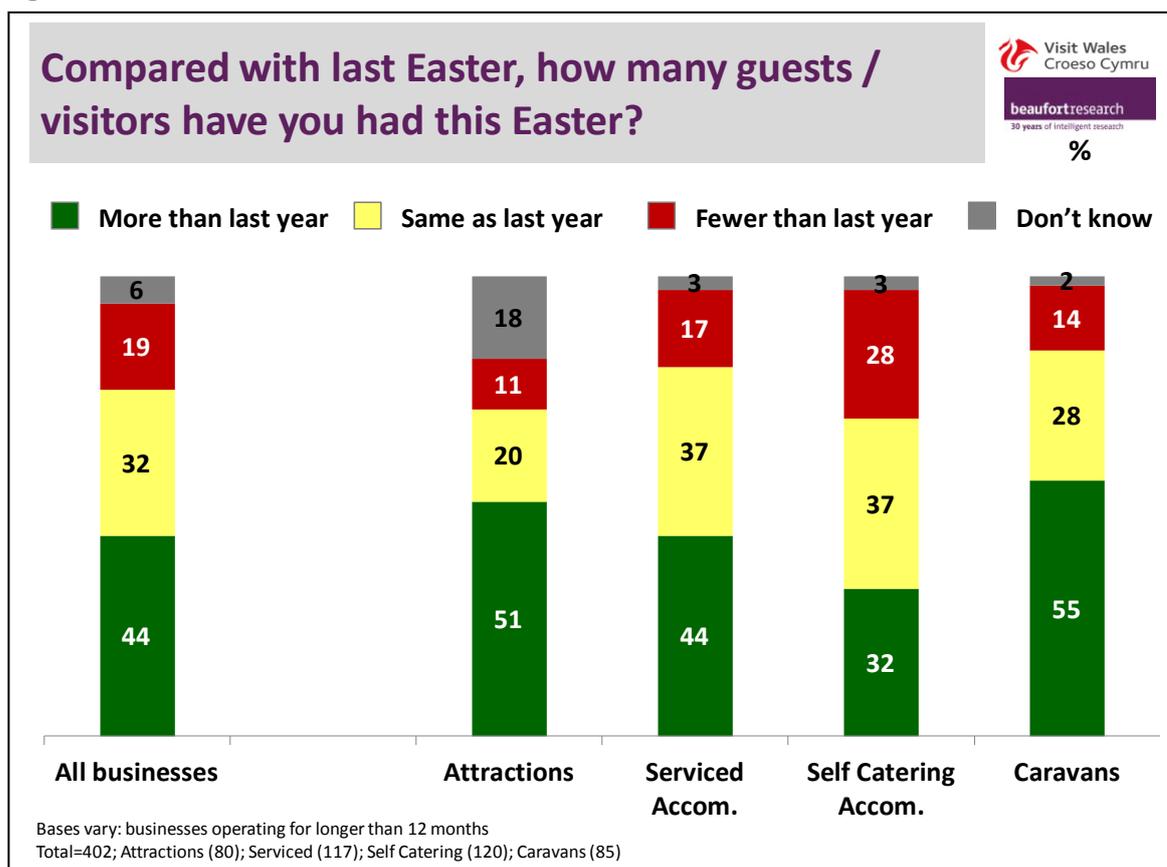
Those tourism businesses that had been established for longer than 12 months were asked to compare the number of guests/visitors that they had received this Easter compared to those they received during Easter last year - the findings for this wave were much more positive than was seen at Easter 2013.

In 2014, around two fifths of businesses (44%) said they had received more guests this Easter compared to last Easter; only 14% said the same at Easter 2013.

This Easter, only a fifth (19%) said they had received fewer guests/visitors (compared to 49% in Easter 2013).

Looking at the data by business type, caravans (55%) and attractions (51%) showed the highest proportion of businesses receiving more guests/visitors. And while around two fifths (44%) of serviced accommodation businesses claimed they had more guests this Easter compared to last, only a third (32%) of self-catering accommodation businesses said the same. Moreover, a similar proportion of self-catering accommodation businesses (28%) reported to have had fewer guests at Easter 2014 compared to Easter 2013 – see Figure 1 below.

Figure 1



Examining guest/visitor numbers by region, it was noted that the highest proportion of business reporting more guests/visitors were situated in Mid Wales (48%) and North Wales (47%), while the highest proportion reporting fewer (24%) were situated in South West Wales.

Amongst those businesses that had received more guests/visitors, most claimed that this was because of better weather (55%), with a further quarter (25%) crediting the later Easter as the reason for their increase in business.

Other factors were mentioned by significantly smaller proportions of businesses: just 7% felt their own marketing efforts had resulted in the increased numbers, while 3% thought that repeat business or an upturn in tourism had been determining factors. See Table 2 below for more details.

Table 2

Why would you say you have had more guests / visitors (unprompted)?	% businesses
Better weather	55
Later Easter	25
Own marketing	7
Repeat business	3
Upturn in tourism	3
Events in the area	2
More British people staying in the UK	1
Improved rooms / facilities	1
Recommendations	1
Increased capacity	1
Visit Wales TV advertising	1
Other	32
Don't know	8

Base = businesses trading 12+ months with more visitors this Easter compared to last year (177)

Some of the 'other' factors provided included:

- Having different school holidays to England (hence increasing the overall holiday period)
- Putting on additional events (e.g. falconry display) and increasing facilities
- The DT100 celebrations
- Better marketing by businesses
- Changes to booking systems.

Amongst those businesses that said they had received fewer guests/visitors this Easter, almost a third (28%) felt that this was a direct result of the weather not being as good this year, while one in ten noted that they felt their lower numbers had been a result of the economic climate (11%) – these were the most frequently mentioned reasons for the drop in trade.

Interestingly, while a quarter of businesses seeing an upturn in guest/visitor numbers credited this to the later Easter, 7% of those reporting a downturn felt that this was due to the later Easter in 2014.

Smaller proportions (4% for each) reported that strong competition or a downturn in tourism in the area had contributed to their lower guest/visitor figures – this latter reason (downturn in tourism) was given by slightly more businesses in North and Mid Wales (6%) compared to South West (4%) and South East Wales (0%) - see Table 3 below for more details.

Table 3

Why would you say you have had fewer guests / visitors (unprompted)?	% businesses
Weather not as good	28
Economic climate	11
Later Easter	7
Strong competition	4
Downturn in tourism in the area	4
Didn't promote the business	3
Unforeseen problems	1
Fewer overseas visitors	1
Other	40
Don't know	23

Base = businesses trading 12+ months with fewer visitors this Easter compared to last year (75)

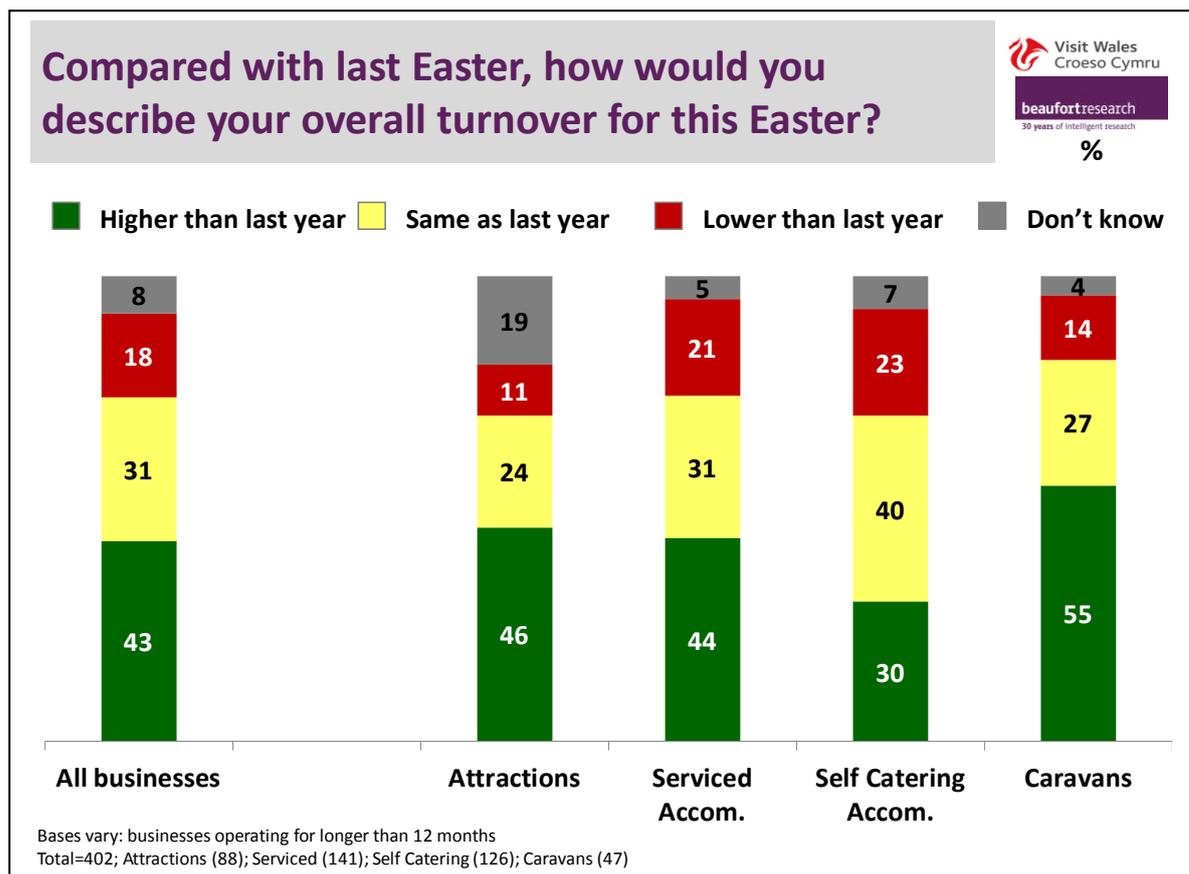
Some of the 'other' reasons given for a decrease in guest/visitor numbers included:

- An increase in shorter breaks compared to longer holidays
- More holiday homes in their area
- Flooding
- Later bookings
- Cancellations.

Not surprisingly, when asked to compare their business' overall turnover for this Easter compared to last, the findings reflected those seen for number of guests/visitors. Around two fifths (43%) said their turnover had been higher this year and around one fifth (18%) stated it had been lower. A third (31%) said that turnover this Easter was around the same as the level seen last year. These findings are again more positive than those seen at Easter 2013, when only 17% reported an increase in turnover, and half (50%) reported a decrease in turnover.

In 2014, caravans were most likely to report that they had higher turnover this Easter compared to last (55%), while self-catering accommodation providers were most likely to report a decrease in turnover (23%) – see Figure 2 below for more details.

Figure 2



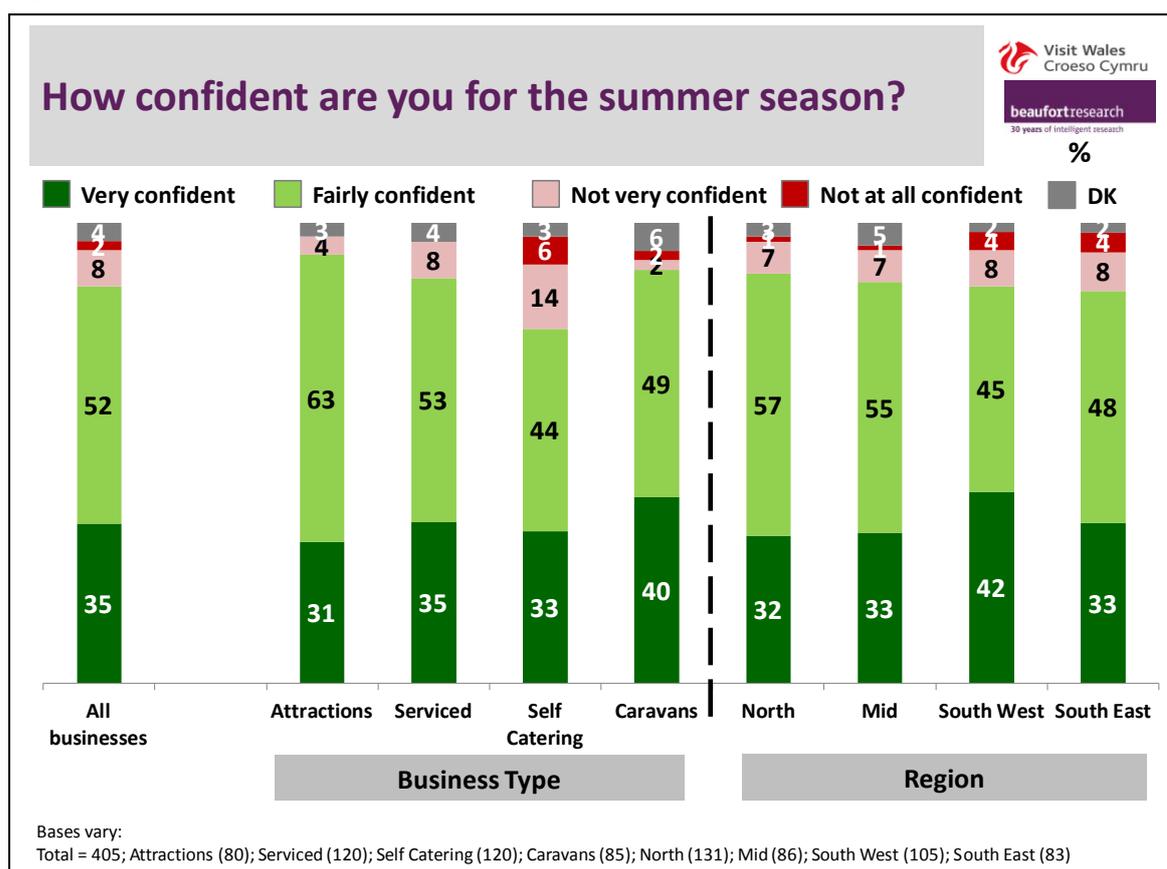
In terms of region, more businesses in North Wales reported an increase in turnover compared to last year (47%), while more businesses in South West Wales reported a decrease (22%). Conversely, in Easter 2013, South West Wales had the highest proportion of businesses reporting an increase in turnover (20%).

On the whole, businesses were more optimistic about the coming summer season compared to at this time last year.

Nearly nine in ten (87%) said that they were confident for the summer season, with a third (35%) saying they were very confident, and half (52%) claiming to be fairly confident. Only one in ten (10%) businesses were not confident for the upcoming summer, with 8% reporting that they were not very confident, and just 2% not at all confident.

Across the different types of business, confidence levels were fairly consistent (with the exception of self-catering accommodation). Overall, confidence levels were highest amongst attractions (94% confident) and those businesses located in North Wales (89% confident) - see Figure 3 below.

Figure 3



3.2 Research and market insights

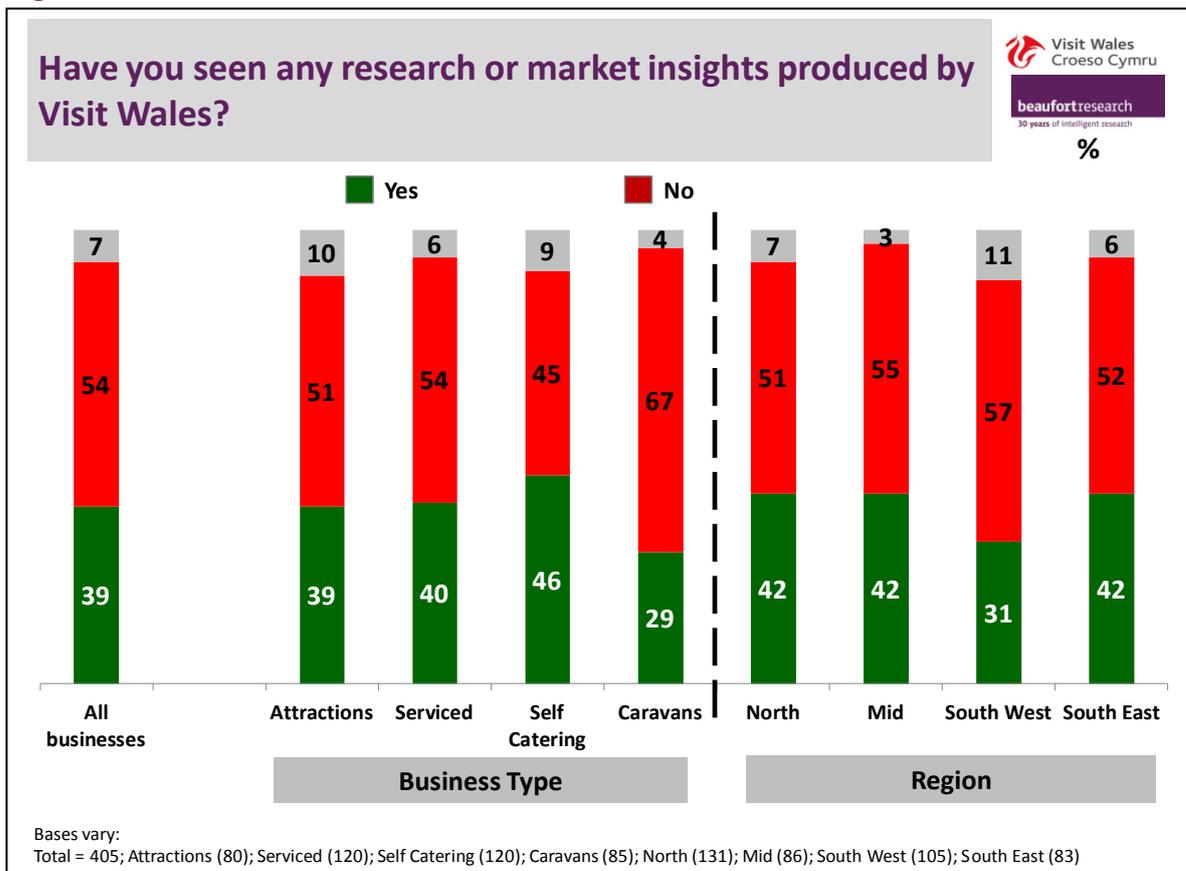
All businesses were asked if they had ever seen any research or market insights produced by Visit Wales.

Just under two in five businesses (39%) said that they had, while over half (54%) said that they had not. A further 7% could not remember if they had seen any research or market insights produced by Visit Wales.

Levels of awareness of research were fairly consistent across different business types and regions, although was marginally higher amongst self-catering businesses (46%) and lower amongst caravan sites (29%).

There were few regional differences; South West Wales was the only area that showed lower levels of awareness of research and market insights, where 31% of businesses had seen any – in all other regions, 42% of businesses had seen any research – see Figure 4 below.

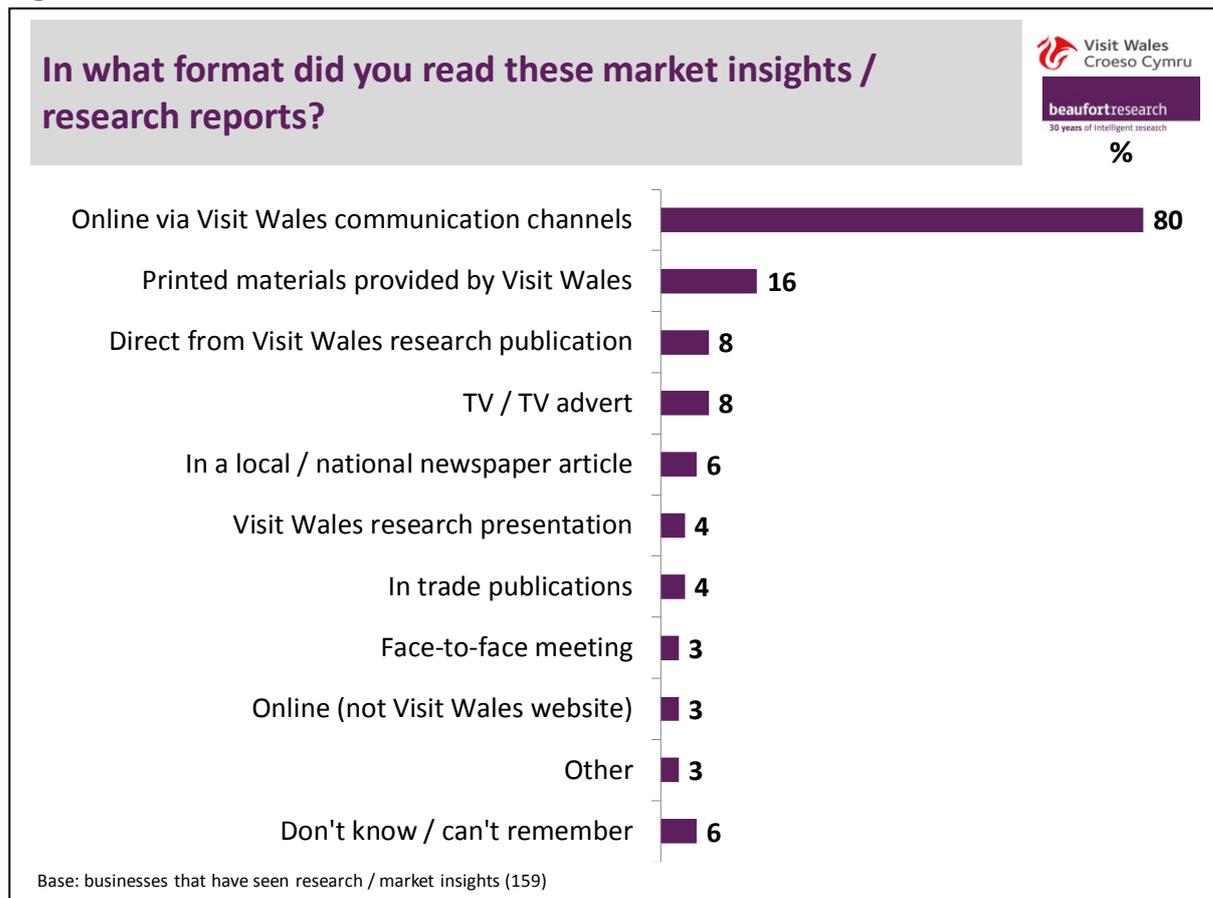
Figure 4



By far, the most frequently used format for accessing market insights and research was online via Visit Wales communication channels (80%), including the website, newsletters, emails or Twitter links.

One in six of those businesses who had seen market insights / research had read printed material produced by Visit Wales (16%). A further 8% said they had received research publications directly from Visit Wales, with 4% attending a Visit Wales research presentation – see Figure 5 below.

Figure 5



When asked to evaluate the market insights / research they had seen, businesses were fairly complementary. They were provided with a list of various aspects of the information they had seen, and asked to rate each on a scale of 1 to 5, where 1 was 'Very poor' and 5 was 'Very good'.

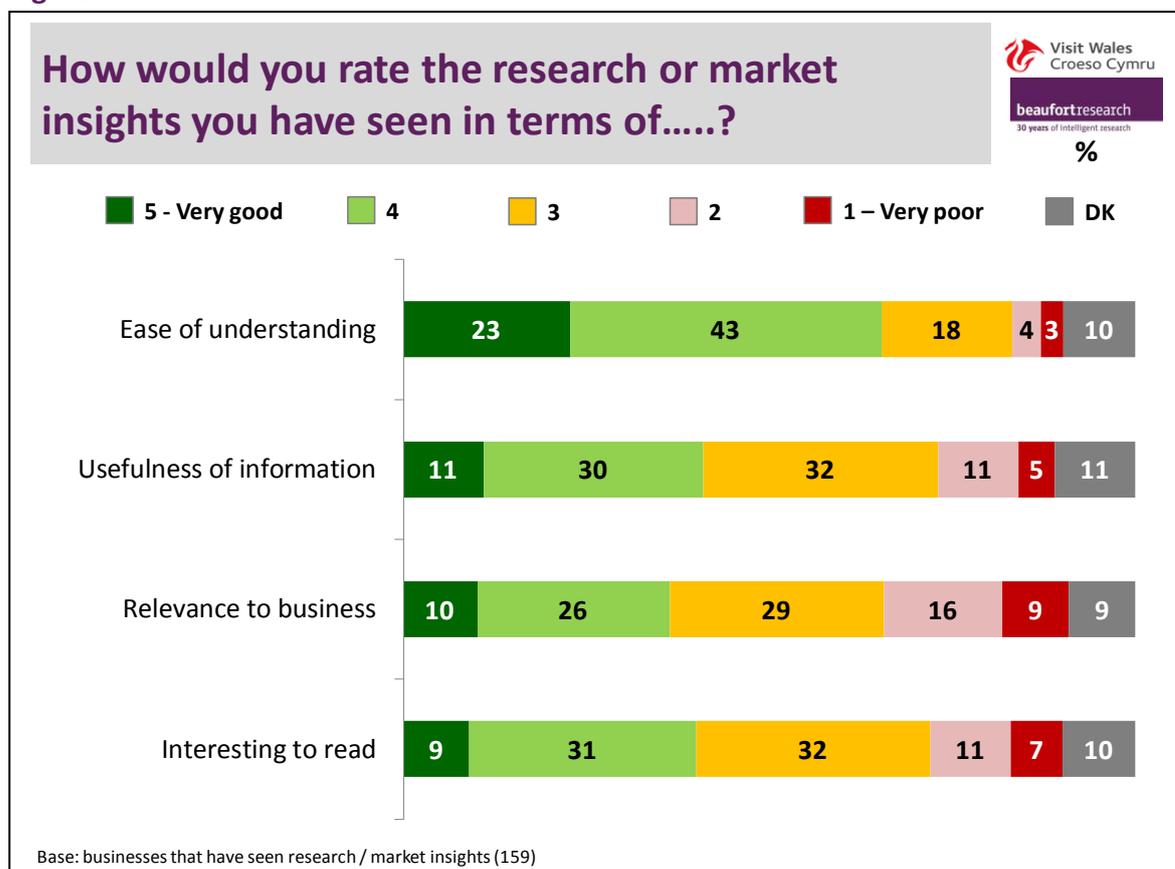
Ratings were most positive for the ease of understanding of the insights / research; two thirds (66%) gave a positive rating, with 23% giving a rating of 5, and a further 43% giving a rating of 4.

For the other aspects of the information, including usefulness, relevance and how interesting they were to read, around two in five gave positive ratings. A total of 41% rated the usefulness of information as a 4 or 5, with another 40% giving the same rating for how interesting they were to read.

Ratings were least positive for the relevance of the information to the business; 36% gave a rating of 4 or 5, while a quarter (25%) gave a negative rating of 1 or 2.

Between two and three in ten businesses gave neutral ratings of for the information they had seen – see Figure 6 below.

Figure 6



Turning to the businesses that had **not** read any market insights or research reports produced by Visit Wales; while a quarter of these businesses stated that they did not have any time to read such material (23%), there was also a general lack of awareness of what information was available amongst a similar proportion (25%):

- 13% didn't realise that Visit Wales produced any market insights / research
- 12% had not received any information
- 7% did not know where to find this information.

There was also a lack of engagement from certain businesses, with 8% reporting they were not interested in receiving such information, 5% feeling that market insights / research were not relevant to their business and a further 5% not opening emails sent by Visit Wales or visiting the website.

A small proportion (3%) claimed to gather market insights and research from other sources, such as Cadw or Local Authorities – see Figure 7 below.

Figure 7



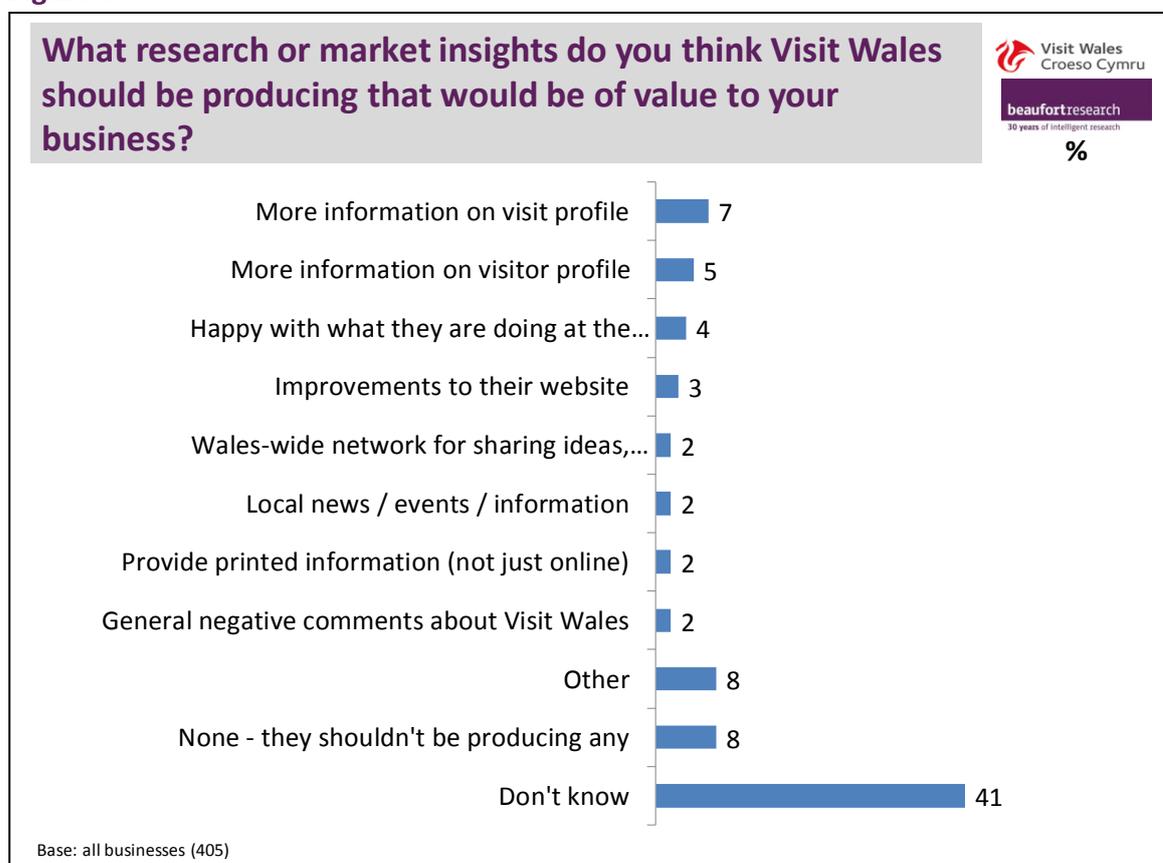
All businesses were then asked what research or market insights they thought Visit Wales should be producing that would be of value to their operations; just over half were able to comment (51%), and while several suggestions were provided, most were given by only a small number of businesses.

Roughly one in twenty businesses wanted to receive profile information on visitors and the nature of their visits:

- 7% wanted more information on why visitors are coming to the area, where they visited, what activities they were undertaking, the size of their group, spend in the area etc.
- 5% wanted more information on the demographic profile of visitors, especially whether they were resident in the UK or visiting from abroad.

There were calls for improvements to the Visit Wales website (3%), including easier navigation throughout the site, ensuring that business details are up-to-date, and providing a booking facility. Another 2% thought that a Wales-wide network for businesses, providing them with the opportunity to share ideas, information and statistics (such as visitor numbers) would be useful – see Figure 8 below.

Figure 8



Those businesses that mentioned market insights that they would like to receive were asked to state which formats they would like to receive the information.

The most popular format by far was to receive newsletters / e-newsletters (68%). Another fifth of these businesses would like to receive report summaries (including Excel spreadsheets providing visitor numbers) and online videos (24% and 21% respectively).

One in six businesses said that they would like to receive research and market insights from reports, workshops (16% for each) and presentations (13%).

Online formats mentioned including:

- Webinars (9%)
- Emails (8%)
- Information on the Visit Wales website / mobile apps (3%).

See Table 4 below for more details.

Table 4

In which of the following formats would you like to receive research or market insights from Visit Wales?	% businesses
Research newsletter / e-newsletter	68
Report summaries	24
Online videos	21
Research reports	16
Workshops	16
Presentations	13
Webinars	9
Emails	8
Information on the Visit Wales website / apps	3
Information through the post	3
Business forums / seminars	1
Other	1
None / don't know	7

Base = businesses who would like to receive research / market insights (207)

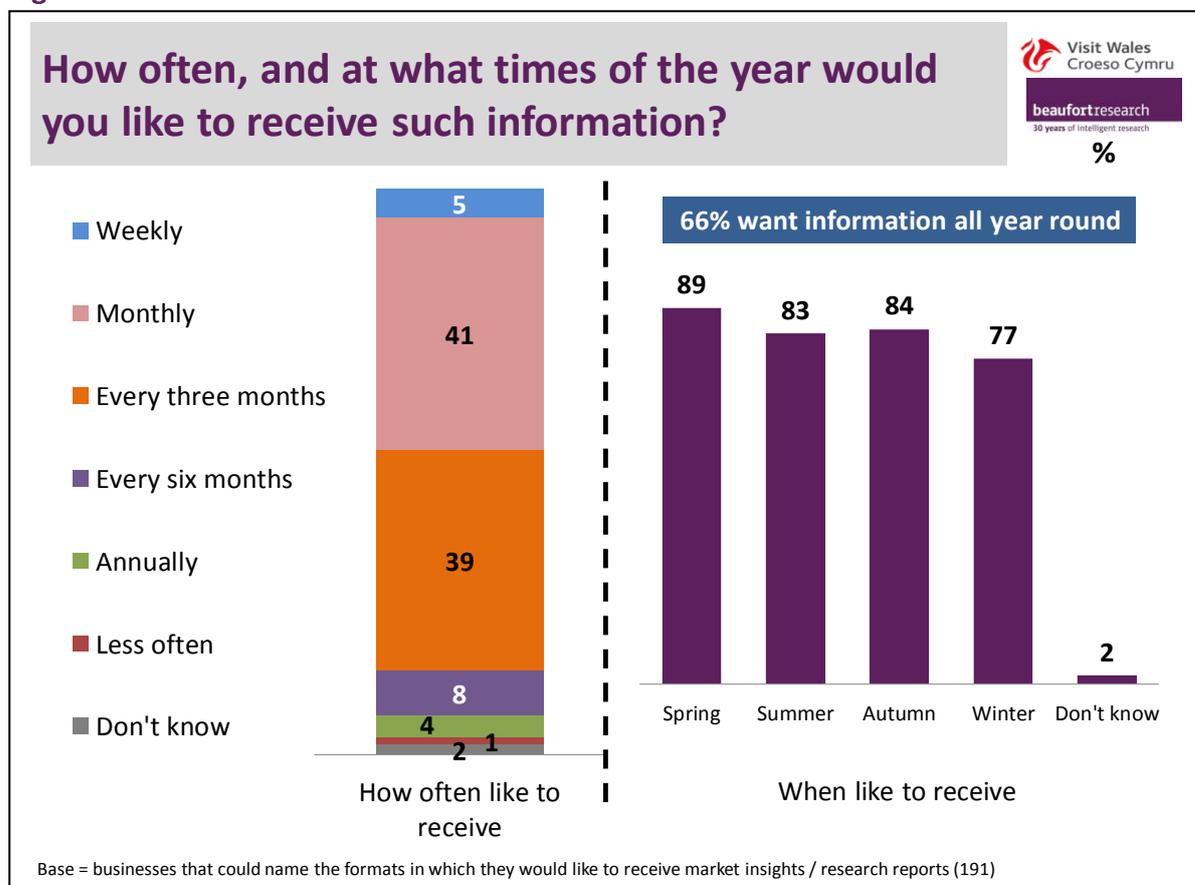
Amongst those businesses that were able to name a format in which they would like to receive market insights and research reports, most would like to receive these fairly regularly; four in five (80%) would like to receive information between one and three times each quarter, with 41% saying they would like monthly updates, and 39% saying they would like to receive information every three months.

Only 13% of businesses wishing to receive market insights / research findings said that they would like to receive information less frequently than this.

Moreover, most would like to receive information in the spring (89%). A further eight in ten would like this information in the summer and autumn seasons (83% and 84% respectively), while three quarters would like information to be provided in the winter season (77%).

At a combined level, 66% of businesses reported that they would like to receive market research / insights all year round - see Figure 9 below.

Figure 9



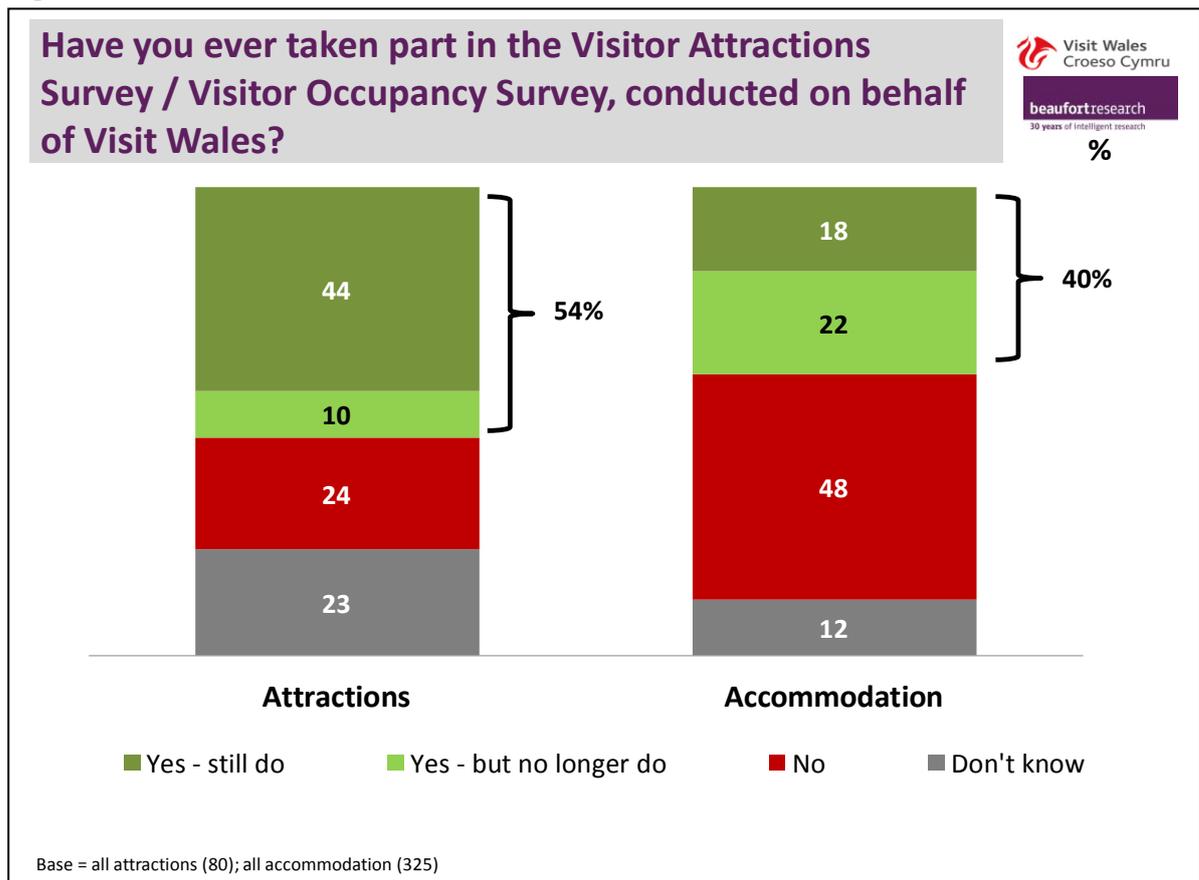
3.3 Participation in market research

Two in five (43%) of the businesses interviewed had taken part in other research projects commissioned by Visit Wales, namely the Visitor Attractions Survey and the Visitor Occupancy Survey: 23% still took part, while 20% had participated in the past but no longer chose to do so.

The remaining 57% of businesses stated that they had either not taken part or could not remember doing so.

Figure 10 below shows the relative proportions of attractions and visitor accommodation providers that took part in these two surveys. It shows how participation in research was higher amongst attractions (54%) compared to visitor accommodation providers (40%).

Figure 10



Businesses were then asked why they chose to take part in research, or why they chose not to. The reasons given for taking part by attractions and accommodation providers were very similar; most of these businesses thought that it was important to take part in research in order to improve the information available and help the tourism sector in Wales (26% attractions; 16% accommodation).

A fifth of attractions wanted to receive some feedback and see how their performance compared to other similar businesses (21%); one in six visitor accommodation providers said the same thing (13%). Another one in ten thought that taking part would be beneficial to their business (9% for both attractions / accommodation) – however, 6% of visitor accommodation providers did not feel that taking part was benefitting their business.

Around one in six attractions (16%) and visitor accommodation providers (15%) took part simply because they were asked to, while one in twenty took part out of habit, or because historically their business had always participated in these surveys (7% attractions; 6% accommodation).

For 9% of attractions, and 4% of visitor accommodation providers, taking part in this research was a business requirement: either because it was a condition of receiving a grant, for other financial incentives or a key performance indicator for their business – see Table 5 below for more details.

Table 5

Why do you / did you take part in this research?	%	
	attractions	accommodation
Research is important / improve information available / help the tourism sector in general	26	16
Want to see how we compare to others / get some feedback / see what's happening in the sector	21	13
Because I was asked to take part / received a questionnaire	16	15
Thought it might be useful to my business	9	9
Business requirement (grant, KPI, financial incentives)	9	4
Just did it! / force of habit / have always taken part	7	6
Don't have the time anymore / took too long to complete	2	5
Wasn't benefitting our business	-	6
Haven't been asked recently	-	5
Just don't take part anymore	-	2
We will take part if we have the time	-	2
Other	14	8
Don't know	12	19

Base = attractions (43); accommodation (129) taking part in research

Again, the reasons given by attractions and visitor accommodation providers for **not** taking part in research were similar. Most of these attractions and accommodation providers had not taken part because they had not been asked to (32% attractions; 19% accommodation).

There was also a lack of awareness of these projects; 5% of attractions were not aware of the Visitor Attraction Survey, while a fifth of these accommodation providers were not aware of the Visitor Occupancy Survey (19%).

There was also a lack of engagement amongst around a third of businesses not taking part (30%): 14% of accommodation providers and 5% of attractions thought that these research projects were not relevant to their business. A further 8% of accommodation providers and 5% of attractions were not interested, while 5% of attractions and 1% of accommodation providers had simply not got around to it.

There were a small proportion of businesses that did not take part because they could not get the required information together (5% attractions; 1% accommodation) – see Table 6 below for more details.

Table 6

Why don't you take part in this research?	%	
	attractions	accommodation
Have never been asked to take part	32	19
Not aware of it	5	17
Just not got around to it	5	1
No particular reason / not interested	5	8
Not relevant to my business / no need	5	14
Only recently taken over the business	5	2
Don't have the relevant information available	5	1
Don't have the time / too busy	-	8
Other	5	4
Don't know	32	29

Base = attractions (19); accommodation (156) **not** taking part in research

APPENDIX

Survey Questionnaire

VISIT WALES BUSINESS SURVEY 2014 FINAL QUESTIONNAIRE (16th APRIL 2014)

Good morning\ afternoon\ evening my name is from Beaufort Research, an independent Market Research Agency based in Wales. I'm calling on behalf of Visit Wales who are interested in your opinion on issues connected to tourism in Wales. The survey should only take a few minutes and everything you say will remain confidential with results reported back to Visit Wales aggregated with other businesses responding.

Can I just check, are you the owner of the business or in a managerial role at the business?

IF NO ask to speak to person in a managerial role/ owner.

S1 Can I just check – do you speak Welsh?

Yes – fluently → **S2**

Yes – not fluently → **S2**

No – does not speak Welsh → **Q1**

S2 Would you prefer to have the questions in English or Welsh?

English

Welsh

CORE QUESTIONS

Q1 Has your business been established for longer than 12 months?

Yes (**Go to Q2**)

No (**Go to Q6**)

Q2 Compared with Easter last year, how many guests/visitors have you had this Easter?

READ OUT – SINGLE CODE

More than last year → **Q3**

Same as last year → **Q5**

Fewer than last year → **Q4**

Don't know → **Q5**

Q3 (IF MORE) - Why would you say you have had more guests/visitors?

DO NOT PROMPT – CODE ALL MENTIONED

More British people staying in the UK

Better weather

Own marketing

Repeat business

Upturn in tourism

Recommendations

Increased capacity

Events in the area

Improved rooms/facilities

More overseas visitors

Later Easter

Visit Wales TV advertising

Other (please specify)

Don't know

Q4 (IF FEWER) - Why would you say you have had fewer guests/visitors?

DO NOT PROMPT – CODE ALL MENTIONED

Economic climate
Weather not as good
Unforeseen problems
Strong competition
Downturn in tourism in the area
Business winding down
Fewer overseas visitors
Didn't promote the business
Later Easter
Other (please specify)
Don't know

Q5 Compared with last Easter, how would you describe the overall turnover for Easter this year?

READ OUT – SINGLE CODE

Higher than last year
Same as last year
Lower than last year
Don't know

INSIGHTS AND RESEARCH

ASK ALL

Q6 Have you seen any research or market insights produced by Visit Wales?

Yes → **Q7**

No → **Q9**

Don't know / can't remember → **Q10**

ASK IF 'YES' AT Q6

Q7 In what format did you read these market insights / research reports? **PROBE** Any others?

READ OUT – CODE ALL MENTIONED

Online via the Visit Wales communications channels (website / newsletters / emails / twitter links)
Directly from Visit Wales research publication
Visit Wales research presentation
Online via another website (please specify)
Printed materials provided by Visit Wales
In a local / national newspaper article
In trade publications

Other (please specify)

Don't know / can't remember

ASK IF 'YES' AT Q6

Q8 On a scale of 1 – 5, where 1 is 'Very poor' and 5 is 'Very good', how would you rate the research or market insights you have seen in terms of.....?

- Ease of understanding
- Usefulness of the information provided
- How interesting they are to read
- Relevance to your business

1 – Very poor

2

3

4

5 – Very good

Don't know

ASK IF 'NO' AT Q6

Q9 Why have you never read any research or market insights produced by Visit Wales? **PROBE** Any other reasons?

DO NOT PROMPT – CODE ALL MENTIONED

Don't have the time

Not interested in reading market insights / research reports

I don't know where to find the information

It's not relevant to my businesses

Didn't realize they produced any

Other (please specify)

Don't know

ASK ALL

Q10 What research or market insights do you think Visit Wales should be producing that would be of value to your business?

RECORD VERBATIM

Don't know

None - they shouldn't be producing any

ASK IF VERBATIM COMMENT RECEIVED AT Q10

Q11 In which of the following formats would you like to receive research or market insights from Visit Wales? **PROBE** Any others?

READ OUT – CODE ALL MENTIONED

- Presentations
- Research reports
- Report summaries
- Workshops
- Webinars
- Online videos
- Research newsletter / e-newsletter

} **Q12**

Other (please specify)

Don't know → **Q14**

ASK IF CODED 1-7 (PLUS OTHERS) AT Q11

Q12 How often would you like to receive such information?

READ OUT – SINGLE CODE

- Weekly
- Monthly
- Every three months
- Every six months
- Annually
- Less often

Don't know

ASK IF CODED 1-7 (PLUS OTHERS) AT Q11

Q13 And at what times of the year would you like to receive such information?

READ OUT – CODE ALL MENTIONED

All year round (single code option for this)

- Spring season
- Summer season
- Autumn season
- Winter season

Don't know

ASK ALL ATTRACTIONS

Q14a Have you ever taken part in the Visitor Attractions Survey, conducted on behalf of Visit Wales?

READ OUT – SINGLE CODE

Yes – still do → **Q15**

Yes – but no longer do → **Q15**

No → **Q16**

Don't know / can't remember → **Q17**

ASK ALL ACCOMMODATION PROVIDERS

Q14b Have you ever taken part in the Visitor Occupancy Survey, conducted on behalf of Visit Wales?

READ OUT – SINGLE CODE

Yes – still do → **Q15**

Yes – but no longer do → **Q15**

No → **Q16**

Don't know / can't remember → **Q17**

ASK IF 'YES' AT Q14a OR Q14b

Q15 Why do you / did you take part in this research?

RECORD VERBATIM

Don't know / can't remember

ASK IF 'NO' AT Q14a OR Q14b

Q16 Why don't you take part in this research?

RECORD VERBATIM

Don't know / can't remember

CORE QUESTIONS

Q17 Which of the following best describes your location?

READ OUT – SINGLE CODE

- Seaside
- Urban
- Inland
- Don't know

Q18 Finally, how confident are you for the summer season?

READ OUT – INVERT SCALE BETWEEN RESPONDENTS

- Very confident
- Fairly confident
- Not very confident
- Not at all confident
- Don't know

Q19 To help with the analysis, can I ask is your business graded or accredited by Visit Wales?

- Yes
- No

- Don't know

READ OUT

Thank you for your time.

Just to confirm that my name is xxxxx calling from Beaufort Research and that this survey has been conducted according to the Market Research Society Code of Conduct.

If you'd like to check our credentials, you can telephone the MRS via the freephone number 0500 39 69 99.

Thanks again and goodbye.