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Wales Tourism Business Barometer

Wave 3, Summer 2016

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Wales Tourism Business Barometer: Wave 3, Summer 2016

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

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1. HEADLINE FINDINGS

Excellent summer season for Wales' tourism industry

- 1.1 The tourism industry in Wales has enjoyed a busy summer. Close to half (46%) of tourism businesses have had more visitors than last summer, and more than a third (38%) have received the same level. Only a minority (16%) report being down.
- 1.2 'More British people staying in the UK' is the top reason given for being busier – stated by a third (33%) of businesses receiving more visitors. Some industry leaders believe this is, in part, due to a weak pound and/or the threat of terrorism in mainland Europe.

All sectors and regions have enjoyed a good summer

- 1.3 The increased visitor levels have been seen across all industry sectors and regions of Wales. In particular, caravan and campsites have had an excellent period, with two in three (67%) reporting to be up on visitors compared to last summer. Some fine weather and more British people staying in the UK are thought to have combined to make a successful summer for this sector.

German and other European markets are also up this year

- 1.4 As well as the domestic market performing well, operators have also seen more visitors from mainland Europe to date this year. About two in five (41%) businesses have had more visitors from Germany compared to last year, and a similar proportion (43%) have had the same level.
- 1.5 About two in five (39%) operators have had more visitors from other European countries, and about half (47%) have had the same level.

Confidence for rest of the year is fairly high

- 1.6 Following a good summer, about a quarter (27%) of operators say they are 'very confident' for the rest of the year, and many others (57%) say they are 'fairly confident'.

Impact of Brexit remains to be seen

- 1.7 Two in three (67%) operators say that Brexit has had no effect on their business, and a further 16% say they do not know.
- 1.8 Feedback from the remaining 17% of operators saying Brexit has affected their business varies. A weak pound seems to have had some impact, but the general consensus is that the full impact, if there is to be any, remains to be seen.

2. QUALITATIVE FINDINGS

- 2.1 Eight depth interviews have been conducted over the telephone with key tourism figures across various organisations and bodies across Wales.
- 2.2 The main findings are discussed below.

Strong performance this year for the tourism industry

- 2.3 The feedback from industry leaders has been positive so far this year. While visitor volumes may not be record-breaking, there is certainly a feeling that 2016's performance has been well-received. After decent weather, overall numbers are up, and industry confidence is high.

"Initial feedback has been positive. I believe we have had a busy summer."

"The summer has been better than last year, mostly due to decent weather."

"Most properties are up on last year. The good weather has played a significant part in this."

"The sector has improved this summer, mainly due to an improvement in local infrastructure in the area."

Local events have lifted visitor volumes

- 2.4 Some industry leaders say that events have helped boost nearby business, as the increased footfall has a positive impact locally.

"Local festivals have also been key to attracting visitors."

"We have done well with local festivals this year, such as The Big Cheese."

"Events in Cardiff really benefit much of South East Wales. Events such as the Roald Dahl event have brought in visitors. These events in Cardiff have a big effect on us."

"Local events have attracted more visitors."

Visit Wales marketing delivers a boost

- 2.5 Some industry leaders say they have seen benefits following Visit Wales' marketing, which has encouraged more people to spend time in the country.

"The advertising by Visit Wales has also been effective, particularly the 'find your epic' advertising."

“The year of adventure has also had a positive impact.”

“The summer has felt busier. This may be due to campaigns like the Year of Adventure.”

Brexit vote has increased staycations

2.6 The UK voted to leave the EU during a referendum in June. Since the vote, the value of the sterling dropped, making it more expensive for British and Northern Irish people to holiday abroad.

2.7 As a result, some industry leaders say they have seen an increase in the number of staycations since the vote.

“We have seen an increase in overseas visitors. This may be the result of the Brexit vote and a weaker pound.”

2.8 It is possible that this has also impacted on an increase in the type of visitor they would usually expect to head overseas for their holidays and short breaks. Some believe the reported acts of terrorism in Europe this year have also led holidaymakers to believe it is safer to stay at home.

“Many of those on staycations aren’t our typical visitors – they are visitors who have historically gone abroad on holiday but have chosen to holiday in the UK due to a weaker pound, general economic uncertainty and the terror threat in Europe and further afield.”

“The initial fallout has been positive for the sector; the lower pound and uncertainty have meant people are holidaying in the UK. The terror threat in Europe has also boosted tourism to the UK.”

Long term effects of Brexit are unclear

2.9 The impact the Brexit vote will have on the UK are unclear in the long term, but some believe holidaying abroad will become more expensive, meaning more Brits staying in the UK and an increased number of overseas visitors as the sterling becomes better value for money for people living in countries with the euro and US dollar.

“I firmly believe that the cost of holidaying overseas will increase in the future, resulting in more people staying in the UK for their holiday.”

“In the long term I think it will affect people’s confidence in their finances.”

2.10 That increase in tourism for the UK could mean that Wales will need to increase its competitiveness, in order for its tourism industry to benefit from any rise in visitors.

“It’s difficult to judge what the long term impact will be. It’s certain that the marketplace will become more competitive, we will have to work harder in Wales and we need to be on our mettle.”

“I think Brexit will increase the number of visitors due to a lower pound – more overseas visitors and people in the UK choosing to stay here.”

Uncertainty leads to some post-Brexit concerns

2.11 However, there are fears over what the effects of the Brexit vote could look like in the coming years. One concern is over employment, especially for businesses who hire non UK-based Europeans.

“The workers are worried about their future in the country and business owners are worried about what sort of impact Brexit will have on recruiting staff.”

2.12 Another issue is the withdrawal of EU funding and grants, and concern about where equivalent money might come from.

“There’s lots of worry out there - mainly over grants and funding. We really rely on this money in Wales and hope that the Welsh and UK Government step up to the plate and replace any funding lost through the European Union.”

“I can’t see the grants being sustained following Brexit and the same kind of money coming from the Welsh or UK Governments. This will mean more of a fight from local groups all competing for this smaller pot of money.”

“I can’t see where the money is going to come from to support the tourism sector once we leave the EU.”

“The public sector purse is already under pressure, but Brexit will strain this even further. Local authorities will have to focus on the basics in times of funding constraints, like health and education - and the tourism budget will be squeezed even further.”

2.13 Overall, it looks like it may be a case of ‘wait and see’ to find out what the impact of the vote will mean, and how Wales’ tourist industry can deal with whatever lies ahead.

“People in the industry are apprehensive about the future, but if we play our cards right, we could really make the most of it and attract more visitors from the UK.”

3. BACKGROUND AND METHODOLOGY

What is the Wales Tourism Business Barometer?

- 3.1 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. The Survey has been running in various forms since 2005, and normally between two and five research 'waves' are conducted each year.
- 3.2 This research wave relates to summer 2016, with measurements also of expectations for the coming summer season. Ad-hoc questions on the impact of Brexit have also been included in this wave.

How is the Survey conducted?

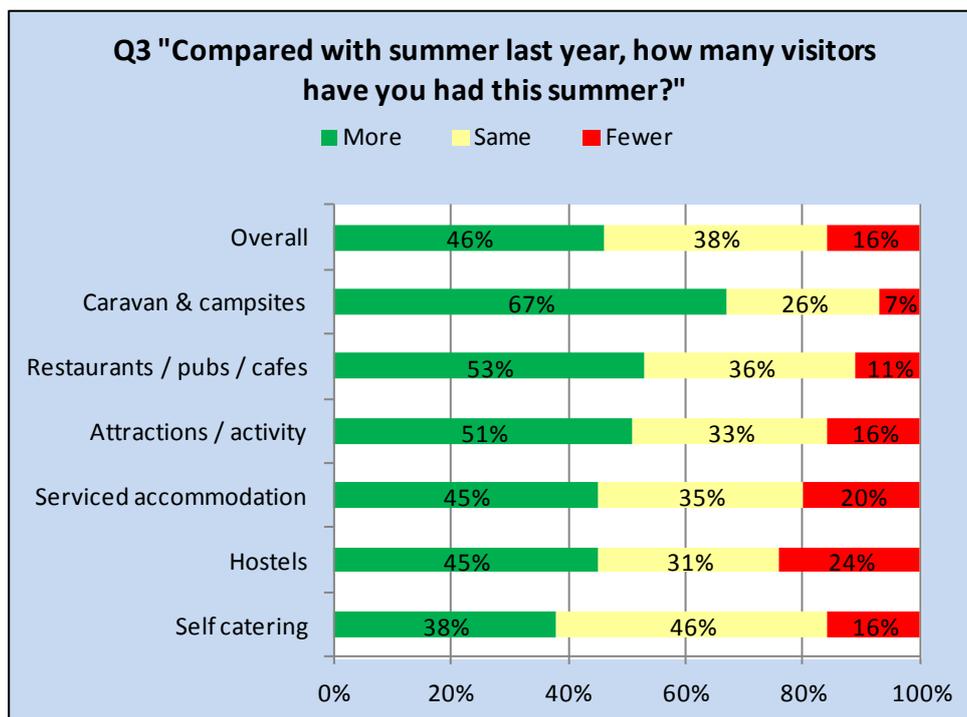
- 3.3 This Survey has been made available for online completion as an alternative to telephone, which prior to 2016 was the only method used.
- 3.4 We have conducted 851 interviews by telephone, and the online survey distributed by area and sector partners has yielded an additional 71 responses. The overall sample of 922 makes results of questions asked to everyone accurate to $\pm 3.2\%$.
- 3.5 The sample of 922 responses is 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 accom	103	35	72	72	282
Self catering	103	53	107	39	302
Caravan / campsites	37	18	30	9	94
Hostels	13	8	8	10	39
Attractions	35	7	31	18	91
Restaurants / pubs / cafes	16	13	9	13	51
Activity operators	28	9	15	11	63
Total	335	143	272	172	922

- 3.6 Slightly over half (58%) of the sample are currently graded by Visit Wales and the remainder (42%) are not. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes and activity operators, where grading is not applicable. Operators of restaurants, pubs and cafes have been selected in areas of high tourism footfall across different parts of Wales and have been asked to answer questions in the context of their tourist (i.e. non-local) customers.
- 3.7 All telephone interviews have been conducted with business owners or managers between 30th August and 7th September. A copy of the questionnaire used is included as an appendix.

4. SUMMER PERFORMANCE

PERFORMANCE BY SECTOR



Base: 889

Staycations help lift tourism in Wales

- 4.1 Nearly half (46%) of tourism business in Wales say they have seen an increased number of visitors this summer, compared to last year.
- 4.2 One of the reasons for this, according to a third (33%) of respondents who have seen an increase, is that more British people are staying in the UK for their holidays and short breaks.

"We are getting loads of people from the UK staying with us - that is our biggest market."

Serviced accommodation

- 4.3 Overall, caravan and campsites have done particularly well, with two thirds (67%) reporting more people pitching up this summer. For this sector, British people staying in the UK is the most common reason operators have seen an increase in numbers – a third (32%) have stated this.

"It is predominantly UK based visitors."

Caravan / campsite

Good summer for food and fun

4.4 Around half of restaurants (53%) and attractions / activity operators (51%) have also reported larger numbers this summer compared to 2015.

“Good solid summer with plenty of people looking for activities.”

Activity operator

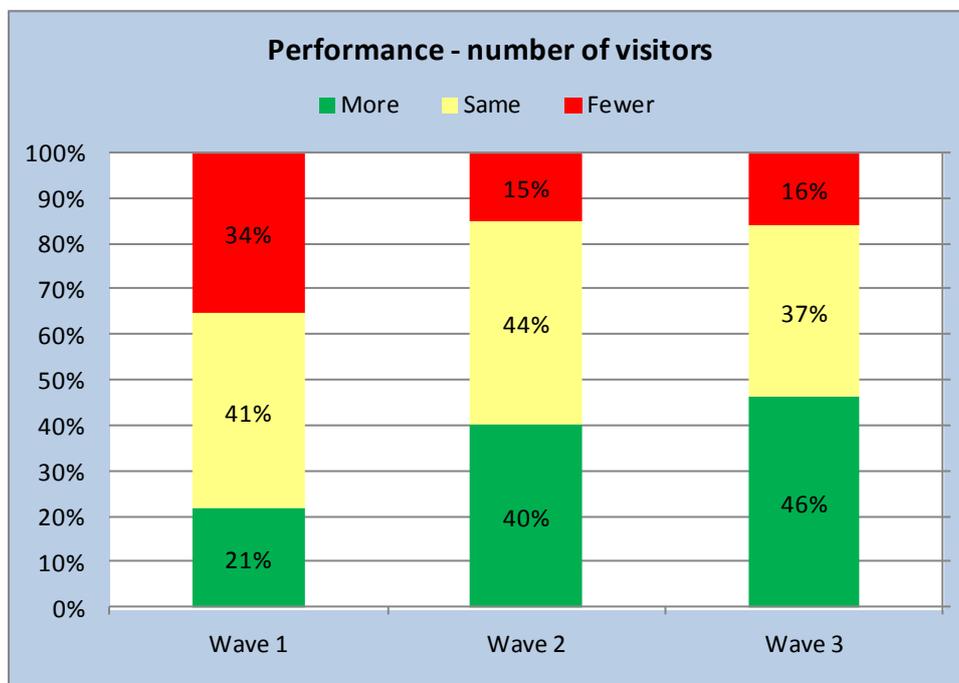
“Good performance.”

Restaurant / pub / café

4.5 Both the serviced accommodation and hostel sectors have fared well, with 45% of respondents from each sector reporting an increase.

4.6 The summer has seen a lift in visitors for 38% of responding self catering operators.

PERFORMANCE TREND

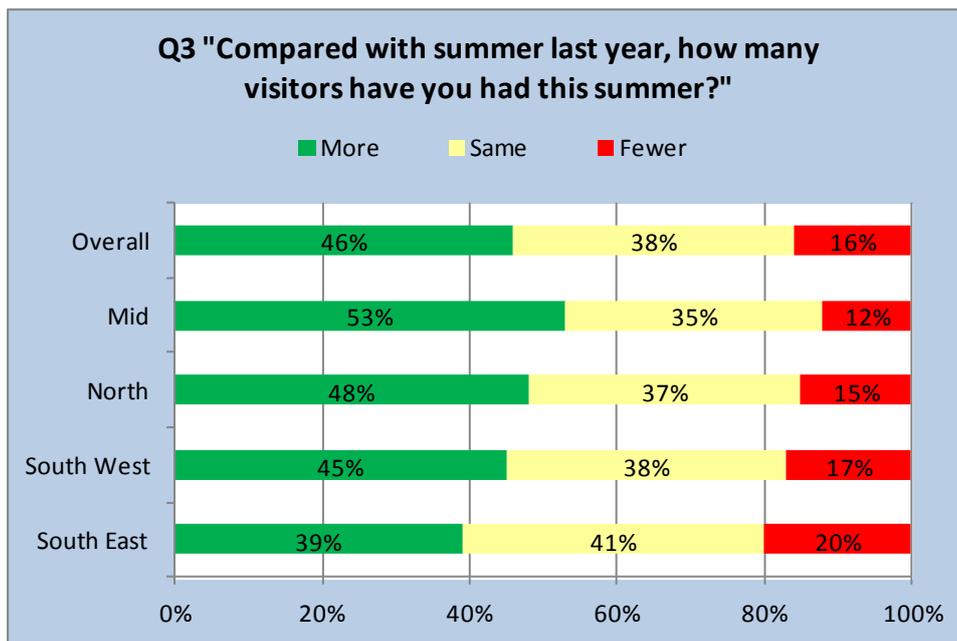


Year continues to improve

4.7 Since this barometer’s first wave in April this year, the tourism industry shows improvement on improvement through 2016 so far.

4.8 At Easter, 21% of respondents reported to be up on Easter 2015, in this summer wave, close to half (46%) report an increase in the number of visitors compared to the same period last year.

PERFORMANCE BY REGION

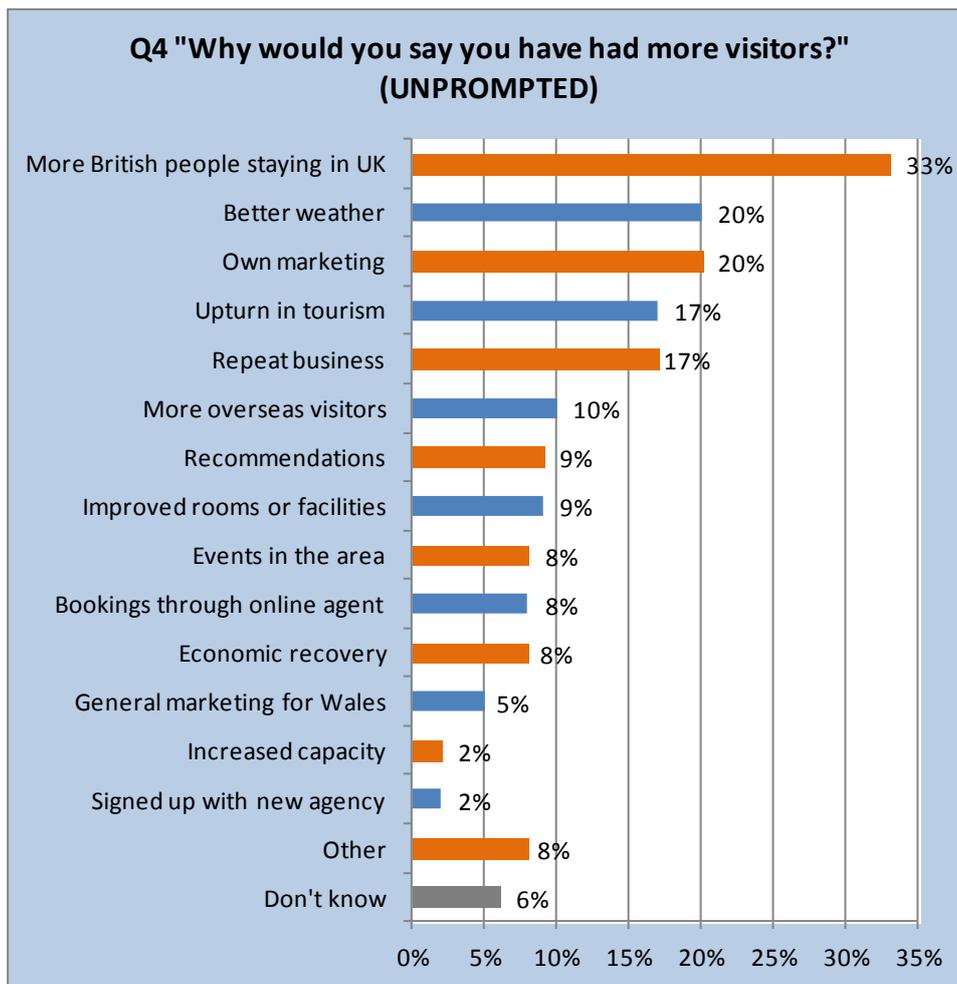


Base: 889

All regions have enjoyed a good summer

- 4.9 The summer's strong performance has been welcomed by all regions of Wales, with little significance difference between them.
- 4.10 Mid Wales has enjoyed the most growth, with over half (53%) of respondents in the region reporting to be up on last summer.
- 4.11 North Wales is also feeling stronger after nearly half (48%) say they have seen more visitors during the season.
- 4.12 Wales' coastal South West has capitalised on the fine weather, with 45% of operators seeing an increase over the summer months.
- 4.13 And 39% in the South East have also benefited from a boost in numbers, compared to the summer of 2015.

5. REASONS FOR INCREASED VISITOR LEVELS



Home for the holidays

- 5.1 Of the respondents who report being up in the summer, a third (33%) say that more British have stayed at home during the holiday season. Restaurants, pubs and cafes, in particular, have benefited from staycations, with nearly half (48%) noting more British staying in the UK.

"We get a lot of English tourists who come to stay at Trecco Bay."

Restaurant / pub / café

"Most here are Welsh and from UK."

Restaurant / pub / café

- 5.2 Two in five (39%) serviced accommodation operators have also noticed British people staying in the UK, as have 32% of attractions and activity providers and caravan and campsites.

"Definitely an increase, especially visitors from UK."

Caravan / camping

- 5.3 This, according to some operators, may be because of the reports of terrorism in Europe and the weakened sterling, making staying in Britain a safer and less expensive option.

“Terrorism - people feel safer in Britain than mainland Europe - and the lower pound value.”

Serviced accommodation

“Terrorism and the value of the pound are increasing numbers.”

Serviced accommodation

“I think concerns abroad mean more people are staying in the UK.”

Caravan / campsite

Brighter weather means a lift in visitors

- 5.4 For 20% of those who have seen an increase, the better weather has helped encourage people through the doors. Better weather has been most beneficial to attractions and activity operators, of which 35% who have seen an increase point towards the weather as a positive factor.

“Good weather showed off our area to other Welsh guests.”

Serviced accommodation

- 5.5 Better weather had helped 60% of outdoor-based attractions with increased visitor volumes welcome more guests, compared to 40% of those indoor and 40% with a balanced mix of indoor and outdoor offerings – although this is based on a small sample size.

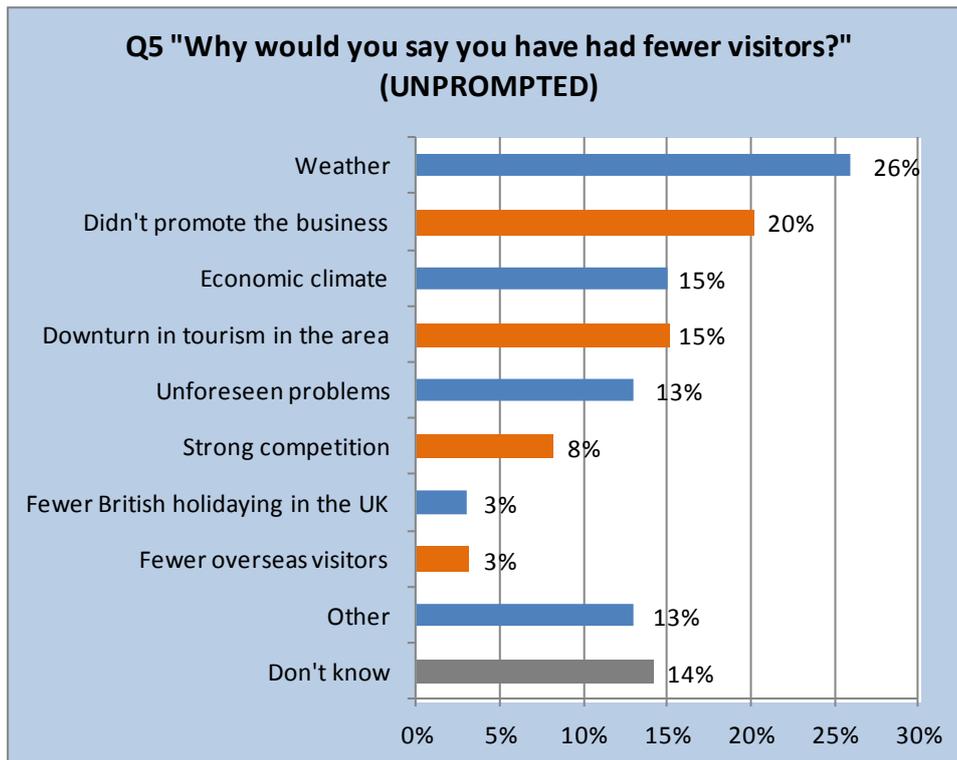
Euros helped put Wales on the map

- 5.6 Wales performed above and beyond expectations in Euro 2016, with the national football team reaching the semi finals of the competition. Some operators believe the success of the team has helped put Wales in the minds of visitors and potential visitors, which could have helped boost business this summer.

“Wales doing well in the Euros has raised awareness, I think and the rugby world cup has a good positive impact.”

Serviced accommodation

REASONS FOR DECREASED VISITOR LEVELS



Base: 143

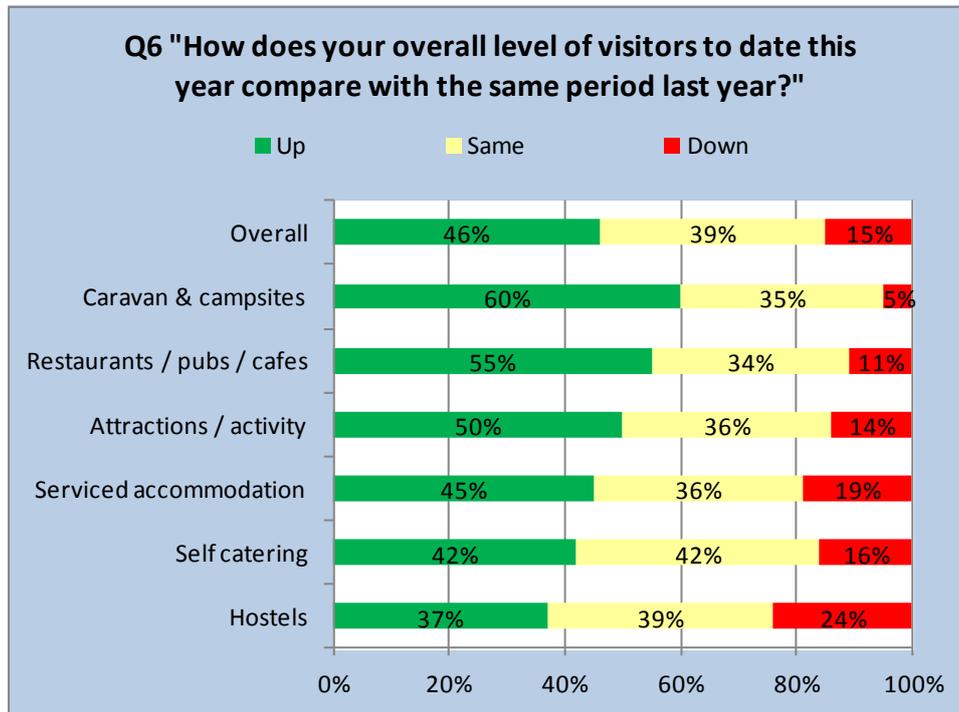
Bad weather dampens business for some

- 5.7 Around a quarter (26%) of respondents who have seen a drop in the number of visitors say that the weather has negatively affected their business this summer.
- 5.8 In particular, 56% of hostels say that the summer's climate impacted in a fall in visitors, as do 40% of eateries, 35% of attractions and activity providers and 33% of caravan and campsites.

*"The weather was not very nice."
Restaurant / pub / café*

6. YEAR TO DATE PERFORMANCE

LEVEL OF VISITORS



Base: 880

Summer increase similar to overall lift this year

- 6.1 The proportion of each sector reporting more visitors over the summer is similar to those who have seen an overall increase in the number of guests they have welcomed to date this year, compared with 2015.
- 6.2 Overall, 46% have seen more visitors this year. Caravan and campsites have done particularly well, with six in ten (60%) reporting to be up.

"It has been up for most of the year."

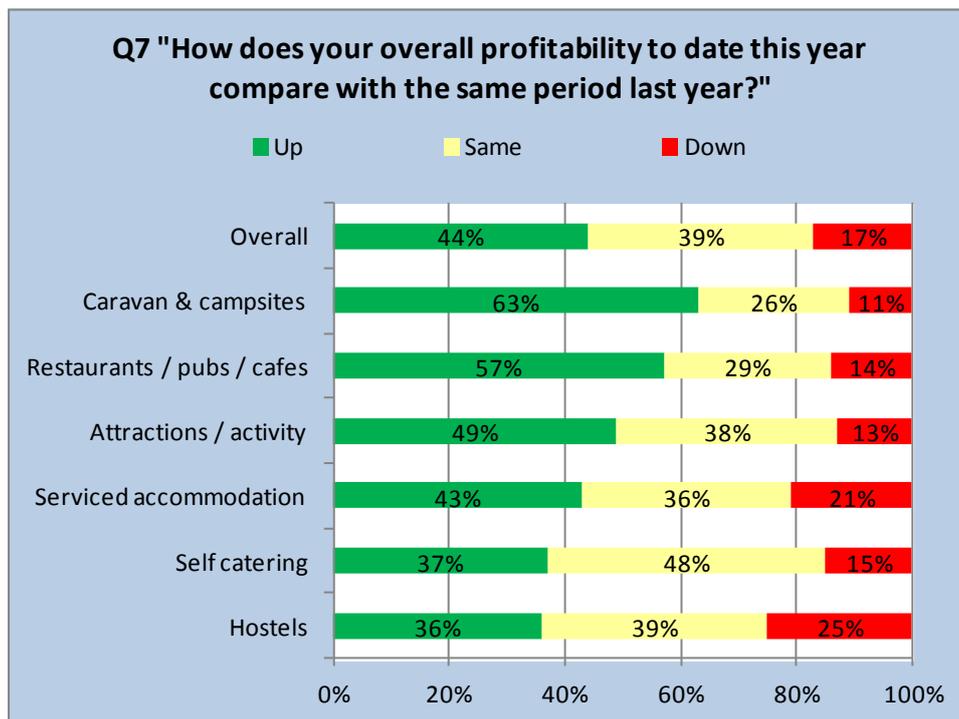
Caravan and camping

"It's gone really well this year."

Caravan and camping

- 6.3 Good proportions of all other sectors are enjoying improved visitors numbers this year, including 55% of eateries and half (50%) of attractions and activities.

PROFITABILITY



Base: 880

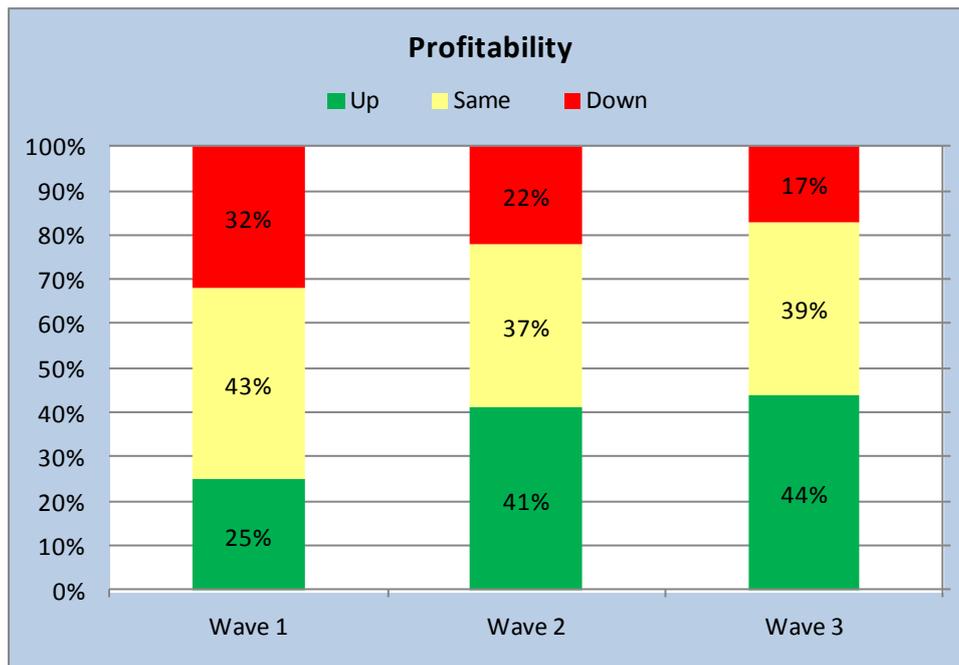
Profitability largely in line with visitor increases

- 6.4 The increases welcomed in the profitability of each sector largely reflect the improvements in visitor volumes, so far this year. As a result, larger proportions (63%) of caravan and campsites reported increased profitability to date this year, compared with other sectors.
- 6.5 Good proportions of all sectors have seen a lift in profitability in 2016, compared with last year.

"We've been fully booked this year... profits are up from last year."
Self catering

"We've been booked out all year, so we've actually made more profit than before."
Hostel

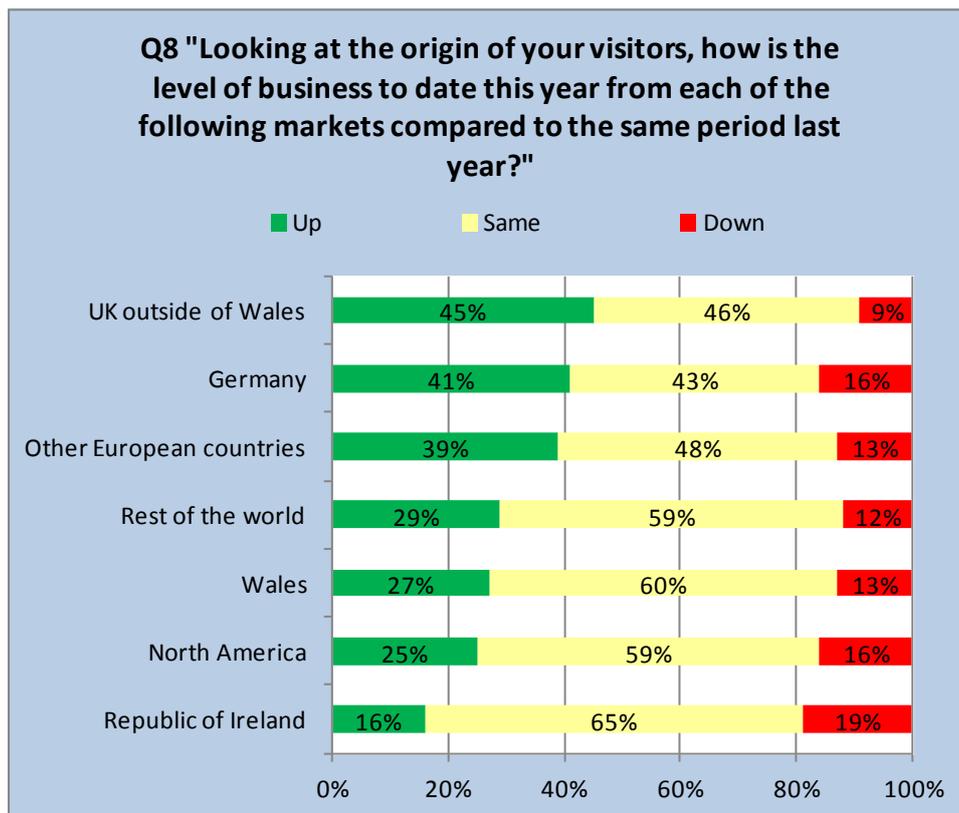
PROFITABILITY TRENDS



Profitability on the up

- 6.6 Larger proportions of respondents have seen increased profitability as 2016 progresses. At Easter, quarter (25%) said they had welcomed a lift in profitability compared to the previous year. Now in the summer, 44% say their books are showing higher profitability compared to the summer of 2015.
- 6.7 Caravan and campsites have seen the biggest financial improvements, with 22% recording an increase in profitability at Easter, but now two thirds (63%) are seeing higher profitability.

PERFORMANCE OF MARKETS



Base: 817

UK delivers strong performance in 2016

- 6.8 As reflected in the reasons for an increase in visitor volumes, the UK outside of Wales has been a source of more visitors for 45% of respondents, who have welcomed more English, Scottish and Northern Irish guests so far this year.
- 6.9 Over half (55%) of caravan and campsite operators have seen more visitors from the UK pitch up, and half (50%) of hostels have booked in guests from this market.

"It's all people from Britain."

Caravan and campsite

"Noticed a lot of visitors from UK cities such as Birmingham."

Hostel

"We have mostly UK visitors from England especially London and Surrey."

Hostel

"Most of our visitors are from the Midlands - border towns - and from London and South East England."

Attraction

More Germans eating in Wales

6.10 Well over half (57%) of restaurants, pubs and cafés say that they have seen a lift in the number of German people they serve in their establishments. A good proportion (46%) of serviced accommodation operators also say they have welcomed more German visitors.

“We've had more people from Germany than previous years.”

Serviced accommodation

“I've seen a marked increase in German visitors.”

Serviced accommodation

Increase in European visitors

6.11 Around two in five (39%) respondents say they have been welcoming more visitors from other European countries, too. Again, a higher proportion (54%) of restaurants, pubs and cafés have seen an increase, compared to the average of 39% across all sectors.

“This year we are getting a lot of business from European countries.”

Serviced accommodation

“I have noticed visitors from Eastern Europe.”

Caravan and camping

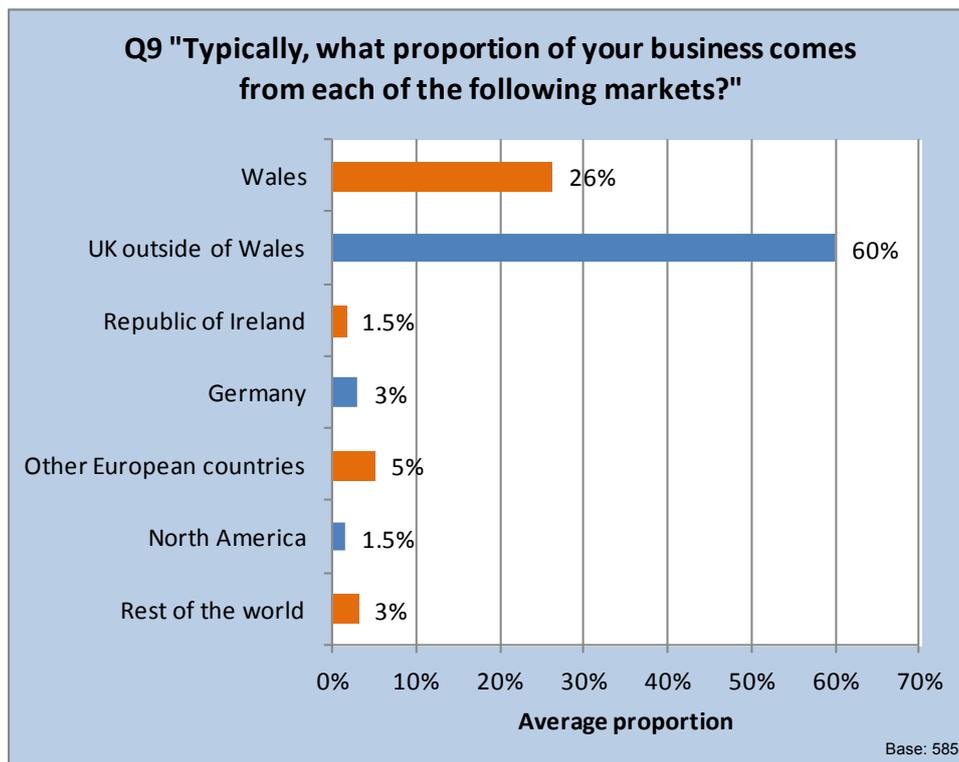
“We are seeing an increase in visitors from mainland Europe.”

Attraction

Mixed results from Republic of Ireland

6.12 While all other markets have fared well so far this year, 19% of respondents say they have had fewer visitors from the Republic of Ireland, while 16% have seen an increase.

SPREAD OF VISITORS BY MARKET



Many operators have been unable to give a reliable breakdown of their customers by market; these have been excluded from the above results

UK outside of Wales brings in 60% of the visitors

6.13 Three fifths (60%) of tourist visitors to/in Wales are from the UK outside of Wales. The Wales market provides about a quarter (26%) of the volume. Germany is the most significant single country outside of the UK, contributing about 3% of visitors.

6.14 Significant differences between sectors include:

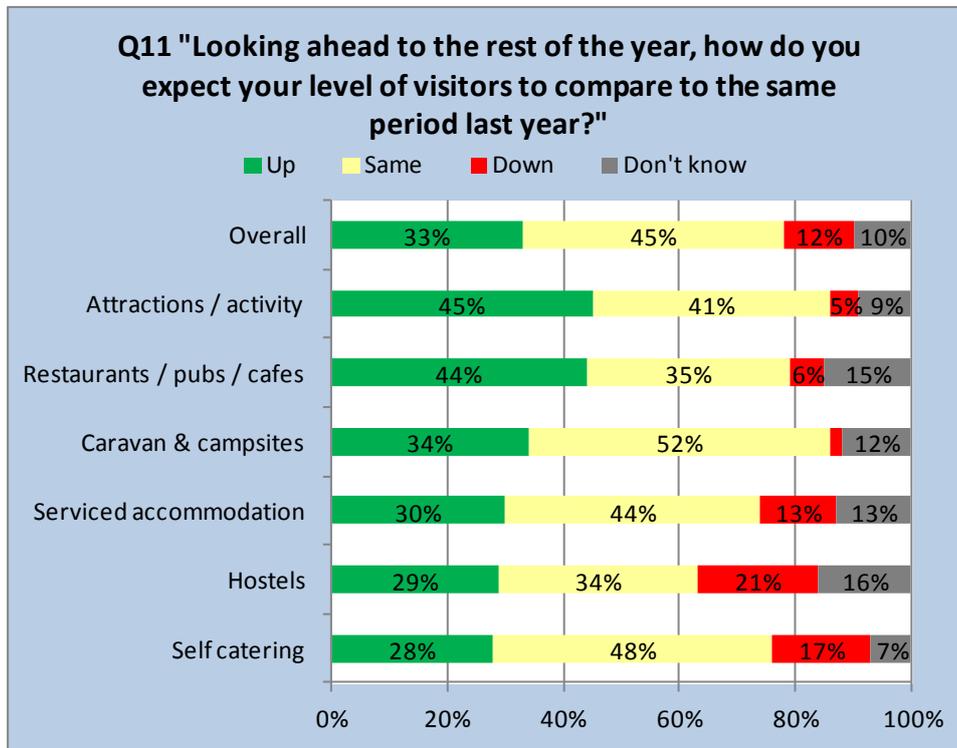
- The self catering sector receives a much higher proportion (74%) of UK (outside Wales) visitors than the other sectors
- Wales visitors are most represented among restaurants / pubs / cafés (46% of tourist customers) and attractions & activity providers (41%)
- European (outside UK) visitors are more prevalent in the serviced accommodation sector (14% of guests) and hostels (13%)

6.15 Significant differences by region of Wales include:

- South East Wales attracts the highest proportion (19%) of visitors from outside the UK
- North Wales attracts the highest proportion (72%) of UK (outside Wales) visitors

7. EXPECTATIONS AND CONFIDENCE FOR THE REST OF THE YEAR

EXPECTATIONS BY SECTOR



Base: 897

Positive performances predicted

7.1 Looking towards the rest of the year, the final few months of 2016 should bring a lift in visitors for a third (33%) of tourism businesses in Wales. This positive movement is on the back of a fairly strong year.

7.2 A good proportion of attractions and activity operators (45%) and eateries (44%) are expecting to see an increased number of visitors on their premises in the remainder of the year, compared to the same period in 2015.

"It should be good for the rest of the year."

Attraction

"We're very confident as people are willing to book more ahead. Longer lead times help us predict our business more accurately."

Activity operator

7.3 The same is true for around a third of caravan and campsites (34%) and serviced accommodation (30%).

"I can already see bookings coming up. We are booked out until November."

Serviced accommodation

"We have extended our business period and are now open over Christmas, and are all booked for Christmas."

Caravan and camping

7.4 But hotels (29%) and self catering operators (28%) are not far behind, with plenty of positivity for the coming months.

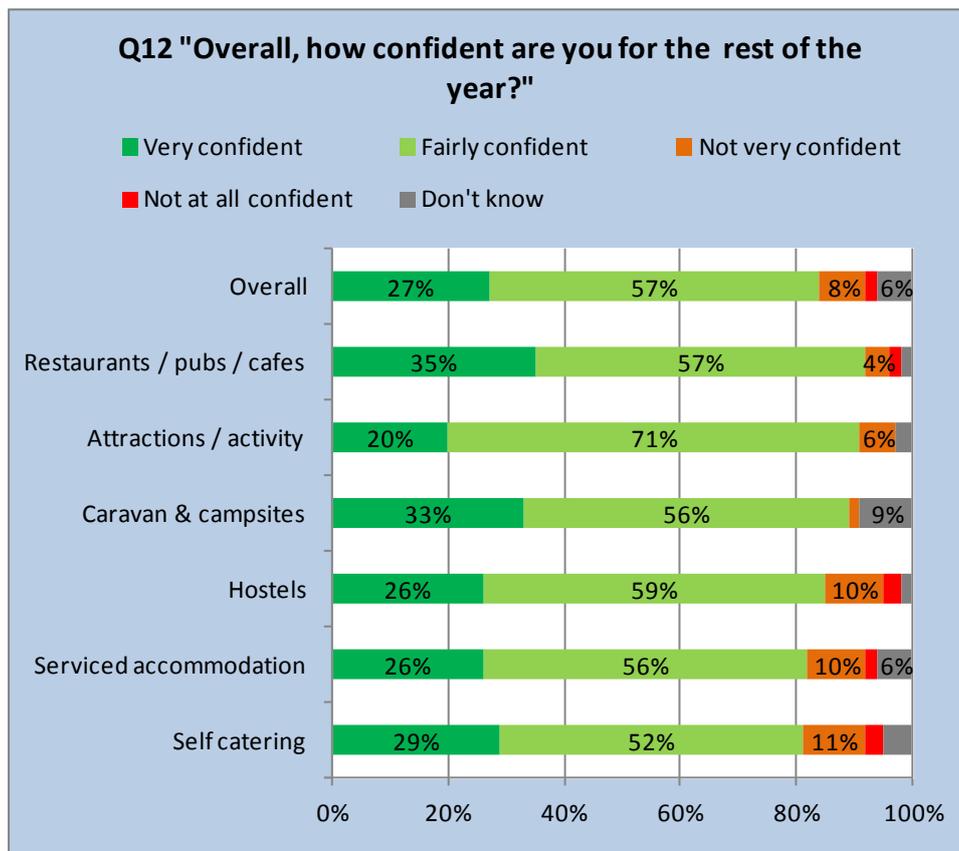
"Strong bookings up until December."

Self catering

"We're all booked up for rest of year."

Hostel

CONFIDENCE BY SECTOR



Base: 922

Brimming with confidence for the coming months

7.5 Confidence levels are very strong after a good year so far. Overall, 84% of operators say they are either 'very' or 'fairly confident' in the performance of their business in the remainder of 2016.

7.6 A very good year for restaurants, pubs and cafés has led to high positivity, with around a third (35%) 'very confident' and a further 57% 'fairly confident' until the end of the year.

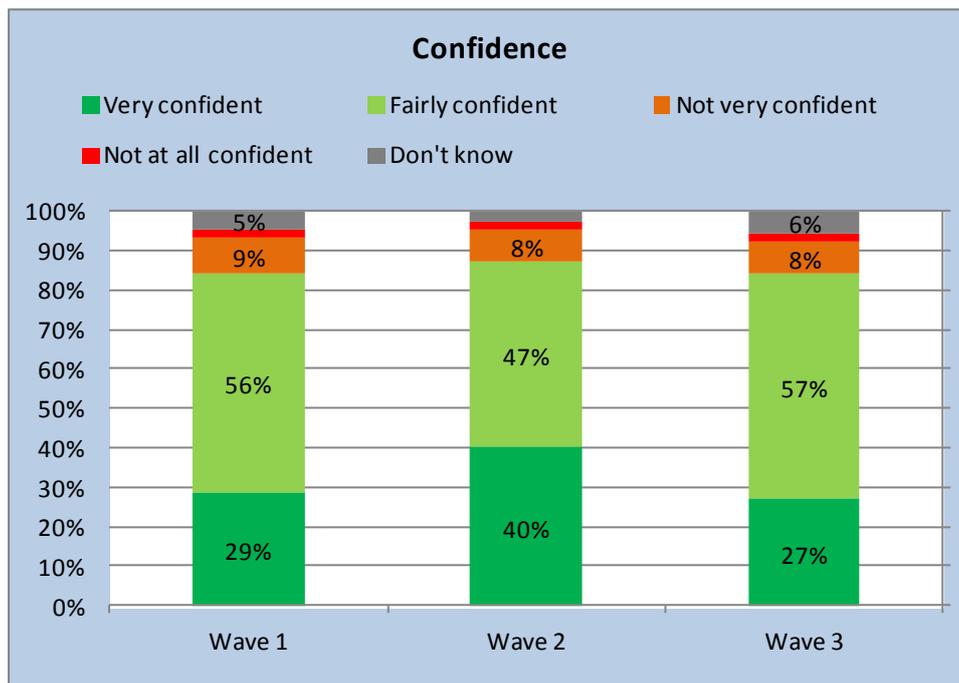
"Looking at how it's been so far things are looking good for the rest of the year."
Restaurant / pub / café

7.7 In fact, confidence is high among all sectors, going forward.

"Pretty confident really, business is going well."
Serviced accommodation

"I'm fairly confident expecting to do better than last year."
Activity operator

CONFIDENCE TREND

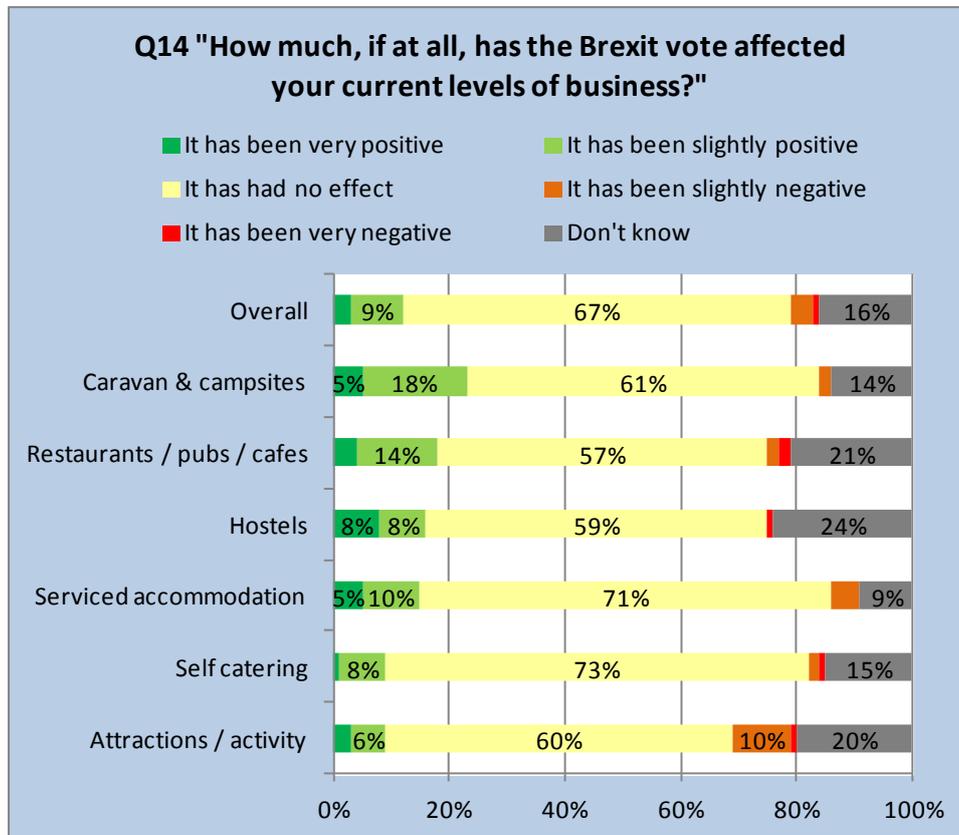


Confident expectations remain consistent through 2016

- 7.8 This year continues to see a confident tourism industry in Wales. The vast majority of respondents see the coming months in a good light, at each stage of the year.
- 7.9 Confidence was at its strongest at wave 2, as businesses looked towards a bright summer. At this stage, two in five (40%) were 'very confident', and close to half (47%) were 'fairly confident' about the summer months.

8. BREXIT

IMPACT OF BREXIT VOTE



Base: 922

Little impact from Brexit vote, so far

- 8.1 In the first referendum of its kind, the UK voted to leave the European Union. The vote, which took place in June, saw 52% opt to leave.
- 8.2 The majority (67%) of respondents say they have not been affected by the Brexit vote – and a further 16% don't know what, if any, impact it has had. But while it will take a few years for the UK to separate from the EU, some operators have noticed an impact.

"I found that just after Brexit business was affected and now it's back to normal."
Caravan / campsite

- 8.3 A higher proportion (12%) say that the impact has been positive, compared to 5% who believe it has had a negative impact, so far.
- 8.4 One of the reasons it has been positive, according to some operators, is that the weakening of the sterling post-vote made Brits more likely to holiday at home as the euro dropped in value for money.

Uncertainty over future post-Brexit impact

8.5 Most respondents are unsure of what impact, if any the Brexit vote will have in the next few years. For many, it's a case of 'wait and see' as any affects come into play.

"Don't know, you just can't say what's going to happen."

Serviced accommodation

"It's a bit early to tell."

Attraction

"I think that we'll have to wait, because the economy is still recovering it's difficult to tell."

Self catering

"It depends on the continuing economic and political uncertainty. I suspect people were initially rattled by the result and reigned in spending."

Attraction

"I really don't know, wait and see I suppose. Most of our bookings were booked before Brexit so I can't really say."

Serviced accommodation

Keeping an eye on exchange rates

8.6 The value of the sterling dropped after the Brexit vote, making the UK a less expensive destination for many overseas visitors and a safer bet for visitors from Wales and the rest of the UK. As a result, there has been an increase in the number of UK visitors.

8.7 Some respondents say the impact of the Brexit vote may depend on future exchange rates, which could affect the appeal of the UK to potential visitors.

"Business will depend on the pound and exchange rates."

Hostel

"It depends on the exchange rate if visitors will still come over. Makes no difference to our business overheads."

Activity operator

"It's difficult to say until Article 50 is triggered and economic negotiations begin. Perceptions of the UK as a cost-effective destination will depend on currency values."

Serviced accommodation

Impact of potential visas

8.8 Should border control and visas be needed for Europeans to enter the UK, some respondents believe overseas visitors could add this to their considerations when looking for a holiday destination.

"European visitors coming more due to exchange rate at the moment. Long term, it depends how the euro is versus the pound, whether it stabilises, also if any visa restrictions."

Activity operator

“Financial benefits but depends on European attitudes to Britain and ease of travel.”

Serviced accommodation

“I don’t know how easy it will be, it depends on how difficult it will be for people to cross borders.”

Caravan / campsite

9. APPENDIX

Wales Tourism Business Barometer

Summer Wave

Online Online?
Yes.....

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

Q1 (ATTRACTIONS)
How would you describe your attraction?
Completely or mostly outdoor
Completely or mostly indoor.....
A balanced mixture of indoor and outdoor

Q2 Has your business been established for longer than 12 months?
Yes Go to Q3
No..... Go to Q12

Q3 Compared with summer last year, how many visitors have you had this summer?
More than last year.....
About the same as last year.....
Fewer than last year.....
Don't know.....

Q4 Why would you say you have had more visitors? (UNPROMPTED, TICK ALL THAT APPLY)

- Better weather
- Own marketing
- General marketing for Wales.....
- Repeat business.....
- Economic recovery.....
- Increased bookings through online agent (e.g. booking.com).....
- Signed up with new agency (self catering)
- Recommendations
- Upturn in tourism
- Increased capacity
- Events in the area
- Improved rooms or facilities
- More British people staying in the UK.....
- More overseas visitors
- Don't know
- Other.....
- Please specify other

Q5 Why would you say you have had fewer visitors? (UNPROMPTED, TICK ALL THAT APPLY)

- Weather
- Didn't promote the business / business winding down
- Unforeseen problems.....
- Economic climate
- Strong competition
- Downturn in tourism in the area
- Fewer overseas visitors
- Fewer British people holidaying in the UK
- Don't know
- Other.....
- Please specify other

Q6 How does your overall level of visitors to date this year compare with the same period last year?

- Up on last year
- About the same as last year.....
- Down on last year.....
- Don't know / refused.....

Q7 How does your overall profitability to date this year compare with the same period last year?

- Up on last year
- About the same as last year.....
- Down on last year.....
- Don't know / refused.....

Q8 Looking at the origin of your visitors, how is the level of business to date this year from each of the following markets compared to the same period last year?

INTERVIEWER: IF THEY NEVER RECEIVE VISITORS FROM A PARTICULAR MARKET, TICK 'NOT APPLICABLE'

	Up on last year	About the same as last year	Down on last year	Don't know or not applicable
Wales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UK outside of Wales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Republic of Ireland	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Germany	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other European countries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
North America	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rest of the world	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q9 Typically, what proportion of your business comes from each the following markets?

Please make sure the total adds up to 100%. If you do not have business from a market, please insert a '0'. You do not need to add a % in the box.

Wales (%)	<input type="text"/>
UK outside Wales (%)	<input type="text"/>
Republic of Ireland (%)	<input type="text"/>
Germany (%)	<input type="text"/>
Other European countries (%)	<input type="text"/>
North America (%)	<input type="text"/>
Rest of world (%)	<input type="text"/>

Q10 Interviewer: record all useful comments on performance or markets

Q11 Looking ahead to the rest of the year, how do you expect your level of visitors to compare to the same period last year?

Up on last year	<input type="checkbox"/>
About the same as last year.....	<input type="checkbox"/>
Down on last year.....	<input type="checkbox"/>
Don't know.....	<input type="checkbox"/>

Q12 Overall, how confident are you for the rest of the year?

Very confident.....	<input type="checkbox"/>
Fairly confident.....	<input type="checkbox"/>
Not very confident	<input type="checkbox"/>
Not at all confident.....	<input type="checkbox"/>
Don't know.....	<input type="checkbox"/>

Q13 *Interviewer: record all useful comments on expectations for the rest of the year*

- Q14 How much, if at all, has the Brexit vote affected your current levels of business?
- It has been very positive.....
 - It has been slightly positive
 - It has had no effect.....
 - It has been slightly negative.....
 - It has been very negative
 - Don't know.....

Q15 What impact do you think Brexit will have on your business in the next few years?

- Q16 Could I just confirm whether your business is graded or accredited by Visit Wales?
- Yes.....
 - No.....

Thank you for your time

- Region Region of Wales
- North.....
 - Mid.....
 - South West.....
 - South East.....