

Dadansoddi ar gyfer Polisi



Analysis for Policy



Llywodraeth Cymru
Welsh Government

SOCIAL RESEARCH NUMBER:

60/2018

PUBLICATION DATE:

NOVEMBER 29, 2018

Wales Tourism Business Barometer

Wave 4, Autumn 2018

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Wales Tourism Business Barometer: Wave 4, Autumn 2018

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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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ISBN: 978-1-78964-444-9

November 29, 2018

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1. HEADLINE FINDINGS

Stable autumn season following a fine summer Most (78%) businesses have increased or maintained their visitor levels this autumn. Among the 27% increasing their visitors, 'own marketing' is the most common reason – cited by about a third of these respondents.

The fine summer weather is also thought to have played a part because it encouraged visitors to continue booking UK trips in the autumn.

SE Wales performing well South East Wales is performing well – 35% of businesses have increased their visitor levels this autumn. 'Own marketing' is the most frequently stated reason (43% of respondents).

Other regions of Wales do not differ significantly from each other in terms of overall performance.

Non-accommodation sectors have generally fared better The non-accommodation sectors of restaurants / pubs / cafes and attractions & activity providers have fared slightly better in increasing visitor numbers. About two in five (39%) restaurants / pubs / cafes have increased their visitors – many (54%) of these cite repeat business as a reason.

Businesses are confident for 2019 in spite of Brexit uncertainty Following a mostly stable autumn season, most (84%) businesses are now confident for 2019. This is in spite of concerns that some have over the impact of Brexit on European visitors, and the prominence of Brexit uncertainty in the news during the time of interviewing.

2. QUALITATIVE FINDINGS

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

Steady visitor levels this autumn

2.2 Many of the stakeholders have experienced another good autumn and October half term for business. Operators are seeing barely any difference in performance to the same period last year.

“A few accommodation providers are saying they were busy up until the end of October ... a lot of them were booked up for half term.”

“It seems like things have been ... I say busy, but it’s a quieter time for the sector.”

“Pretty good, but not exceptionally good ... over the whole of October I was on about 60% occupancy.”

Businesses are still benefitting from the summer

2.3 Industry leaders believe that the weather in the summer period encouraged visitors to continue booking UK trips in the autumn.

“The general comments [about being busy] are because of the weather in the summer.”

“I think it’s the weather in general ... it’s been so good over the summer – people are more willing to holiday in this country.”

Events and attractions are encouraging visitors to Wales

2.4 Another factor that seems to be attracting visitors to certain parts of Wales is events taking place at this time of year.

“We’ve had an increase in visitors to the castle because we had the new attractions there from late August, so we’ve had a lot of increase in visitors [to the area] generally.”

“October half term is always really busy. All properties do something for Halloween, whether it’s pumpkin carving, trails ... it’s always a bumper month.”

“More visitors for the rugby internationals”

Mixed responses regarding where to prioritise marketing...

2.5 Stakeholder responses vary in terms of which countries Visit Wales should prioritise for its marketing next year. Some of the interviewees suggest that promotional efforts should be placed a little closer to home, within the rest of the UK and England in particular. This is because they believe more British people will look to holiday in the UK.

“I’m getting more visitors from England than anywhere else, so that would be my advice ... I suppose you shouldn’t be prioritising what you’re already getting, but people are looking more and more to holiday in this country.”

2.6 Additionally, one industry leader believes that large cities in England, especially London, would be a good idea for marketing efforts because you can attract an array of visitors, both domestic and overseas.

“You’re catching people from home, and just keeping the money in the country. And then if you’re looking at London, you get a whole range of people, whether they are expats from mainland Europe, UK citizens – you can cover a range then, but you’re keeping the money in the UK.”

2.7 However, one of the stakeholders discusses airport infrastructure and flight routes to Cardiff Airport and suggests that Visit Wales should be looking much further afield, particularly to the Chinese and Indian markets.

“I spend a lot of time working overseas and I see a lot of Chinese and Indian markets growing. In other words, they are the tourists of the future with more readily available cash.”

... but Brexit uncertainty makes this difficult

2.8 Despite making some suggestions, the industry leaders are cautious about the uncertainty surrounding Brexit and not knowing how the tourism trade will be affected. This means it is hard to know where to prioritise marketing.

“It’s so difficult to know where we are or what impact Brexit will have come March. My feeling is that it probably won’t have too much of an impact and people will still be travelling to and from Europe.”

“I’m guessing because Brexit is still a fairly unknown quantity at the minute.”

“It’s difficult to say with Brexit because you could say at the moment the EU countries as the pound is weak ... but then, who knows by next year what’s going to happen, so I couldn’t say. It’s all unsettled so I think that’s very difficult for us to say that’s what Visit Wales should go for.”

Various suggestions for information and advice services

- 2.9 Industry leaders suggest different ways in which Visit Wales could help businesses flourish. Almost all of the interviewees propose something unique based on their experiences with their members.
- 2.10 Two of the stakeholders would like to see Visit Wales provide marketing advice, especially when it comes to marketing online. One of the stakeholders would specifically like advice on choosing the right booking agencies.

“Marketing advice, especially using social media such as Facebook, Twitter, and how to make websites work better. Any advice with that would be helpful.”

“You’ve got some of the accommodation providers who are really switched on when it comes to know [which booking agencies] to use, and then the others who haven’t got a clue. So, I think advice on the best ones to go with, who to avoid, commission, information on how to get their businesses out there, because it’s so competitive. That would be really useful.”

- 2.11 One of the interviewees would like to see some form of funding to help with the administrative running of small tourist associations. They also add that assistance with how to fill out application forms for grants to fund projects would be beneficial too.

“Very very tiny pots of money, like three, four, five hundred pounds would give us the chance to have some administrative assistance with keeping our tourist associations going, because that’s important not only for networking, but also finding out what’s new, what’s innovative, what other people are doing.”

“Our local association is trying to find funding for a project ... As somebody who works in the local association, I have no idea how to fill in these [grant] forms whatsoever. So, we need somebody who can help us fill in forms to apply for grants.”

- 2.12 Another stakeholder would like to see more detailed statistical information from Visit Wales, including audience profiles and for figures to be broken down by regions and cities.

“VisitEngland have a lot of quite detailed information like the ‘top 20 free attractions’, ‘top 20 paid for attractions’. The Visit Wales information isn’t quite as detailed ... I think if there could be any more development on those kinds of things, we can look at say external trends.”

A combination of confidence and caution for 2019

- 2.13 Almost all of the industry leaders are feeling confident for next year and are holding out for more good weather, which would continue to attract visitors.

“Pretty confident ... bookings are up already for next year because people have obviously been enthused by the weather this year and have already booked for next year.”

“Everyone’s still quite positive for 2019.”

“I am always confident ... we can only hope that we have some great weather again next year and that will bring a greater return as a result, and perhaps more people will stay at home rather than go overseas.”

- 2.14 One stakeholder describes feeling more apprehensive than confident about 2019 as a result of Brexit uncertainty and not knowing whether any impact would be good or bad for tourism.

“I think it’s going to be very different next year. Brexit is in March so I think that will affect things a lot, and I don’t know whether it’s going to be good or bad ... I’m apprehensive – the word I’d use for next year rather than confident.”

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 the autumn period in 2018, with measurements also of expectations for 2019.

How is the Survey conducted?

- 3.3 We have conducted 800 interviews by telephone. This makes results of questions asked to everyone accurate to $\pm 3.5\%$. The sample is reflective of the tourism industry in Wales and is shown below by sector and region:

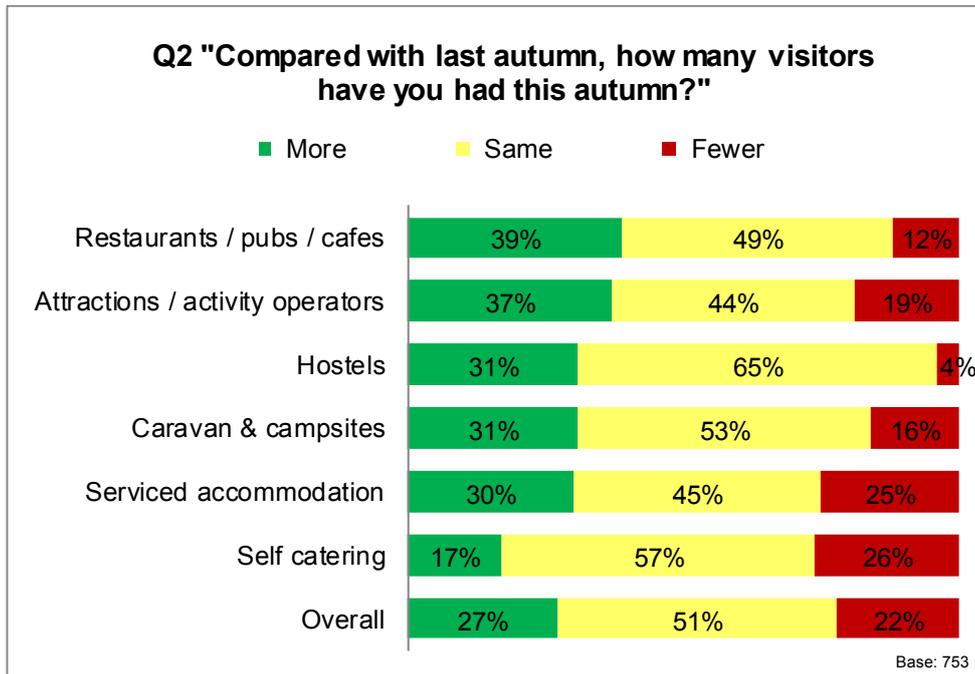
Sector / Region	North	Mid	South West	South East	Total
Serviced accom	97	23	77	57	254
Self catering	118	45	91	39	293
Caravan / campsites	41	9	20	5	75
Hostels	6	7	7	6	26
Attractions	26	12	13	22	73
Activity operators	15	7	13	5	40
Restaurants / pubs / cafes	8	12	7	12	39
Total	311	115	228	146	800

- 3.4 About three quarters (77%) of businesses in the sample are currently graded by Visit Wales, and 23% 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.
- 3.5 All telephone interviews have been conducted with business owners or managers in November. A copy of the questionnaire used is included as an appendix.

Wave	Wave name	Timeframe
Wave 1, 2016	Easter	March 26 to April 10
Wave 2, 2016	May half term	May 28 to June 5
Wave 3, 2016	Summer	June to August
Wave 4, 2016	Autumn	September to early November
Wave 1, 2017	Easter	April 8 to April 23
Wave 2, 2017	May/June half term	May 27 to June 4
Wave 3, 2017	Summer	June to August
Wave 4, 2017	Autumn	September to early November
Wave 1, 2018	Easter	March 30 to April 15
Wave 2, 2018	May/June half term	May 26 to June 3
Wave 3, 2018	Summer	June to August
Wave 4, 2018	Autumn	September to early November

4. AUTUMN PERFORMANCE

PERFORMANCE BY SECTOR



Visitor figures holding steady for the autumn

4.1 Most (78%) businesses have increased or maintained their visitor levels this autumn.

"70 percent of our customers are repeats"
Serviced, South East

"We had more visitors as we did events during half term for Halloween and a fireworks display for bonfire night"
Caravan park, Mid

"Business is slower than autumn 2017"
Restaurant, South East

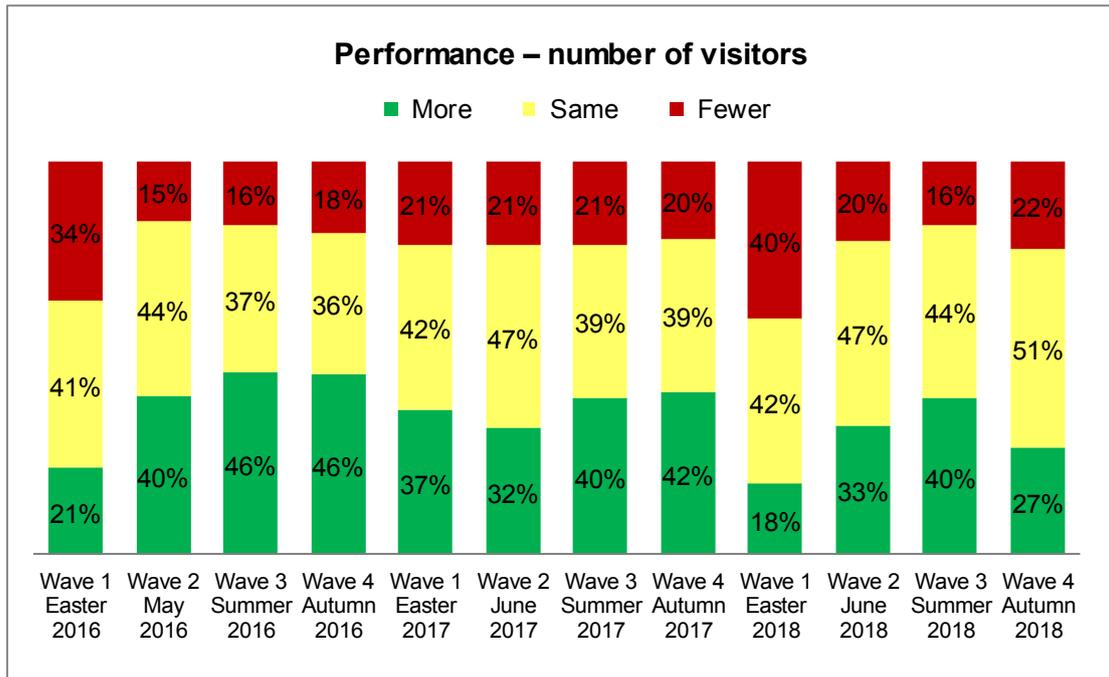
Non-accommodation sectors have generally fared better

4.2 The non-accommodation sectors of restaurants / pubs / cafes and attractions & activity providers have fared slightly better in increasing visitor numbers. About two in five (39%) restaurants / pubs / cafes have increased their visitors – many (54%) of these cite repeat business as a reason.

"Business has definitely picked up in comparison to last year"
Restaurant, South East

"We are number 1 on TripAdvisor in our town" – Restaurant, South West

PERFORMANCE TREND



Autumn performance is much steadier than in previous years

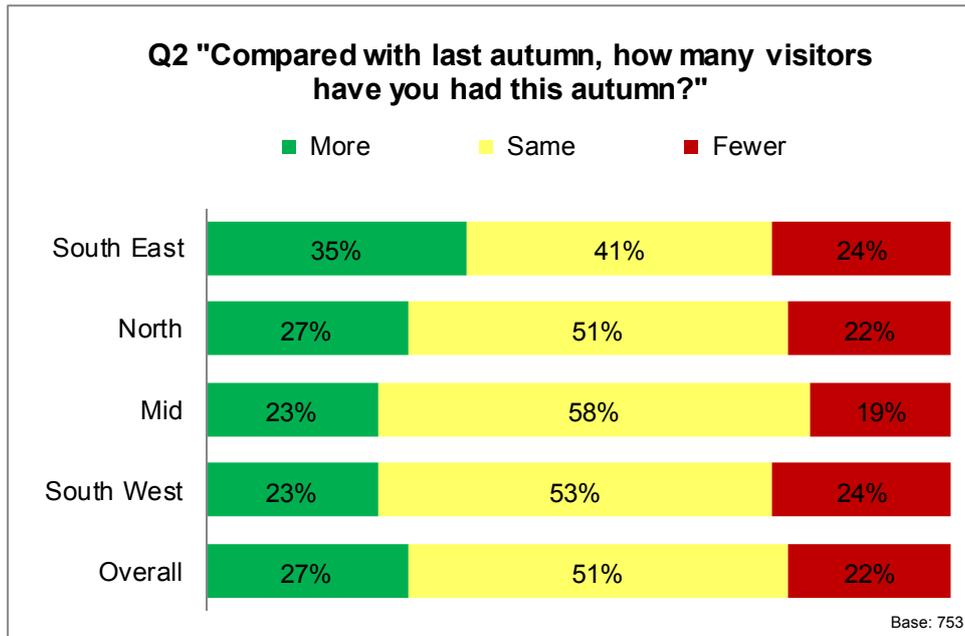
- 4.3 After two years of promising autumn seasons, this year operators seem to be holding onto visitor numbers rather than attracting significantly more. Open comments reveal that some operators are now finding it more difficult to increase visitors.

“Business is getting slower and it is more difficult to get visitors”
Caravan & campsite, North

“It’s getting more difficult to attract bookings in advance”
Serviced, North

“It’s becoming more difficult to get bookings now, it is more competitive”
Self catering, South West

PERFORMANCE BY REGION



Encouraging performance from South East Wales

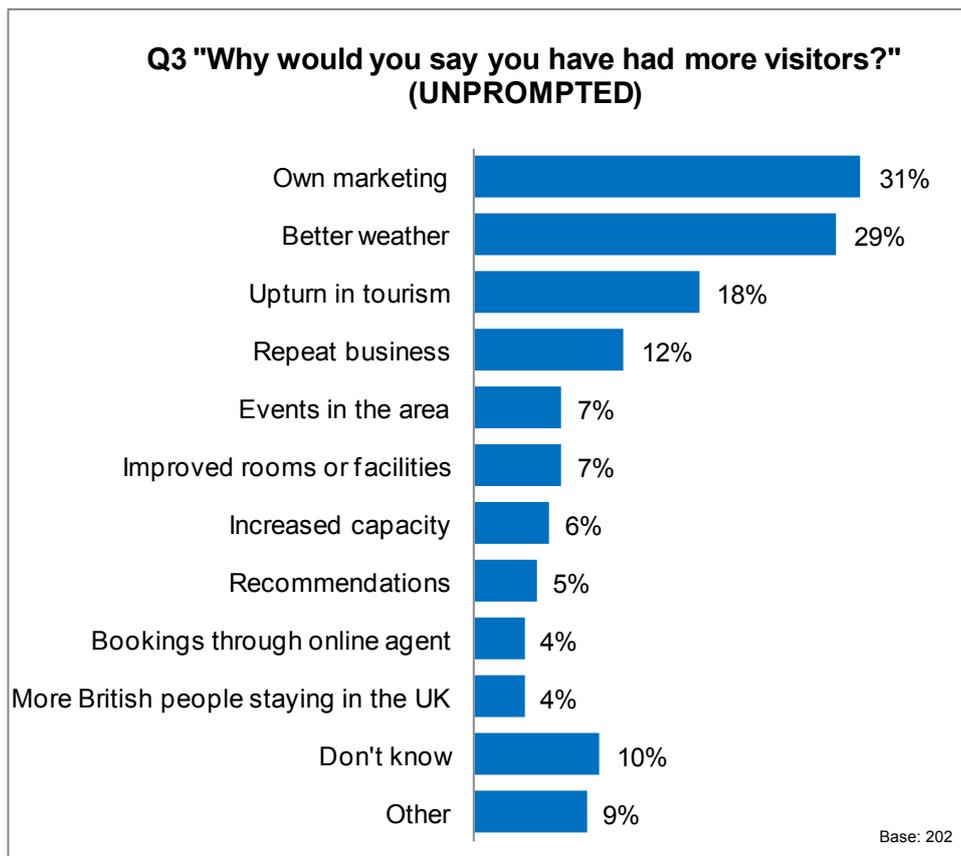
4.4 South East Wales has performed better than the other three regions this autumn. 'Own marketing' is the most frequently stated reason for being busier – 43% of these respondents say this.

"New marketing has perhaps helped increase bookings"
Serviced, South East

"We've had more young people from Europe. They book online, often a few days before arriving."
Hostel, South East

4.5 Other regions of Wales do not differ significantly from each other in terms of overall performance and have all experienced a steady autumn on balance.

5. REASONS FOR INCREASED VISITOR LEVELS



Own marketing brings rewards

5.1 Although the industry welcomed wonderful weather in the early summer months, own marketing is cited by three in ten businesses (31%) as the main reason why they have seen more visitors this autumn.

"New marketing as a different company took over this year"
Serviced, South East

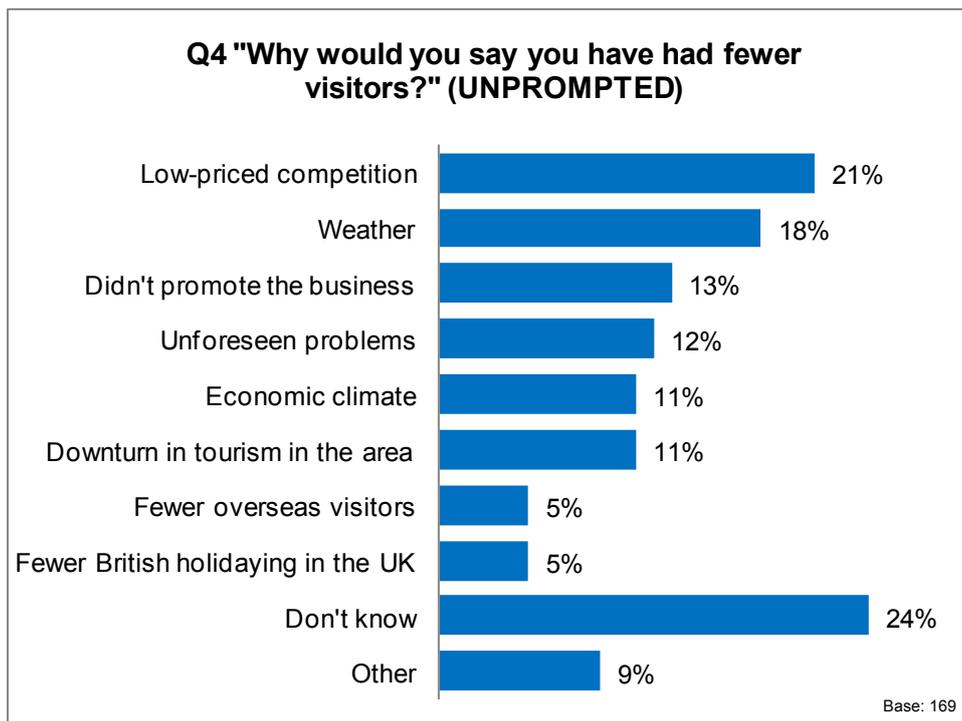
"We have done international programmes with schools in China and Kuwait"
Activity operator, South West

"We're getting more requests for information on the website"
Serviced, South East

Good weather continues to bring visitors

5.2 It appears the tourism industry is still reaping the rewards of a prosperous summer. 29% of businesses report the weather as a significant factor contributing to an increase in visitor figures. This is backed up by the qualitative findings discussed earlier.

6. REASONS FOR DECREASED VISITOR LEVELS



Rise of Airbnb

6.1 The serviced and self catering sectors in particular are enduring the challenge of low-priced competition. This appears to be coming largely in the form of Airbnb. Some operators have decided to sign up too.

"I get most of my bookings from Airbnb. I have just been with them for a year."
Serviced, North

"We were quieter because we're not on Airbnb"
Self catering, North

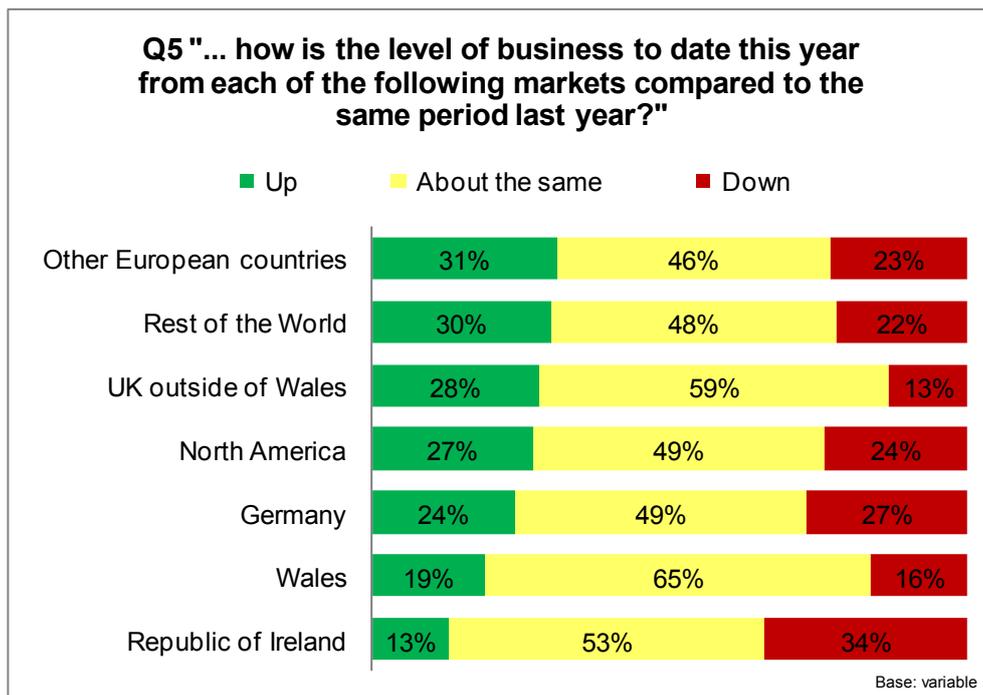
"More low-priced competition in the market now. It's more difficult to get bookings."
Serviced, South West

Some business are winding down

6.2 Not all tourism businesses in Wales promote themselves. Some are lifestyle businesses where tourism is not the owners' main income. Other owners are winding down their business in old age.

"We're closing at the end of the year. I'm 81."
Serviced, South West

7. PERFORMANCE BY MARKET



UK market continues to perform well

7.1 As was seen in the summer, the UK market (outside of Wales) is performing better than last year. Given its importance to the Welsh tourism industry, this is very encouraging to see. This market is up for every sector and region of Wales.

Brexit and European markets – different views and experiences this year

7.2 The performance of European markets this year is mixed. The key market of Germany is about level on balance, the Republic of Ireland is down, whereas the rest of Europe is slightly up on balance.

7.3 Some operators say that Brexit has reduced visitor levels from Europe, whereas others say they have increased.

"Brexit seems to have had an impact already – fewer visitors from Europe"
Serviced, North

"More visitors from Europe this year despite Brexit"
Serviced, South West

"We get a lot of Germans as there are German companies with connections to the area"
Serviced, South East

“We had a few more Dutch this year”
Caravan park, South East

Rest of the world

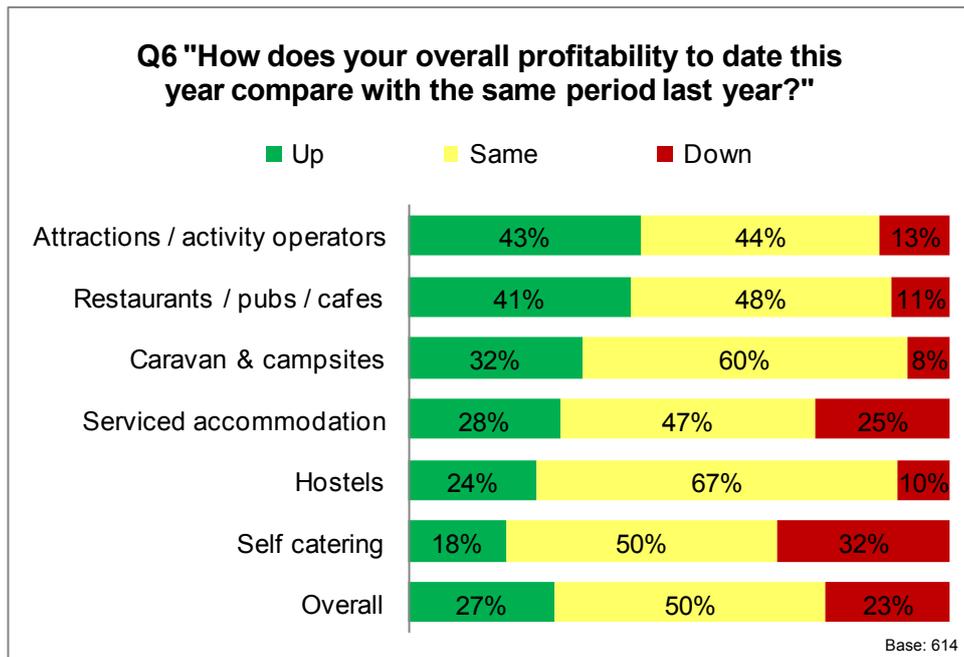
7.4 The ‘Rest of the World’ market (outside Europe and North America) is slightly up on last year. Examples of countries which are up vary. China and Australia have been mentioned, but so too have other long haul markets, whereby visitors who come to Wales seem to be delighted with their experience.

“We get a lot of Chinese visitors. They are impressed with the quality here.”
Serviced, South East

“We’ve had school groups from Mexico and Costa Rica”
Activity operator, Mid

*“We’ve had a lot of guests recently from Thailand, China and India ... they love it
when they’re here”*
Serviced, Mid

8. PROFITABILITY



Varied results by sector

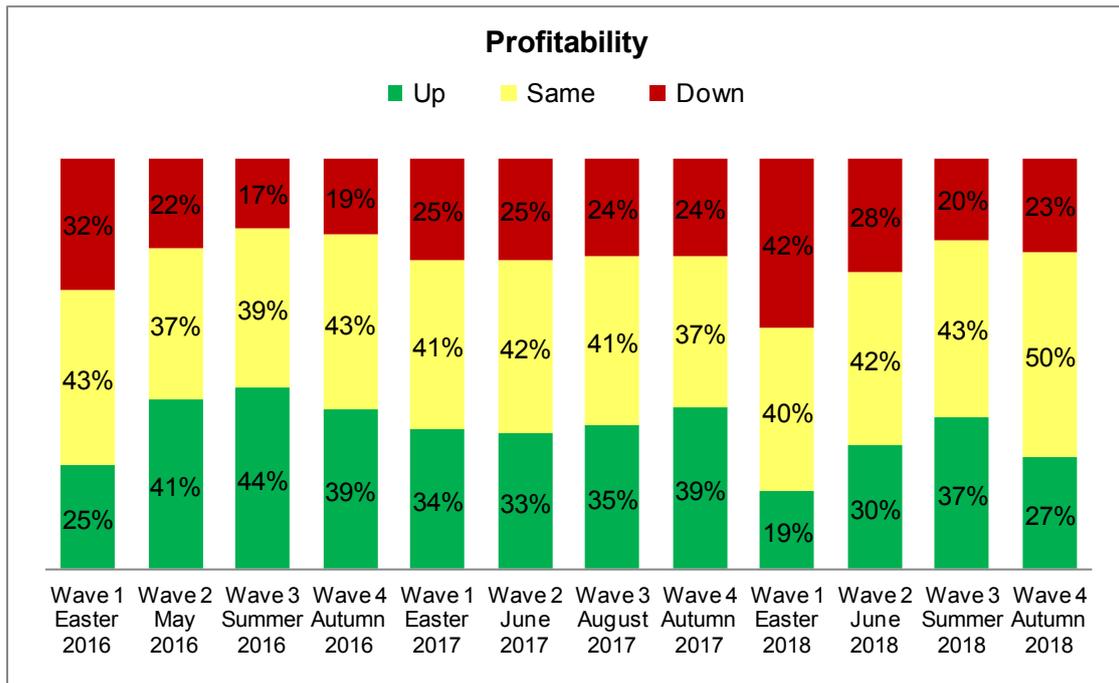
8.1 The non-accommodation sectors have enjoyed a year of healthy profits. Hostels and caravan & campsites have also performed well, but the serviced accommodation sector has had a mixed year, and self catering has endured challenges. Smaller self catering and serviced accommodation operators have faced a lot of low-priced competition from Airbnb this year.

"This year was terrible. Airbnb takes all our customers."
Serviced, Mid

8.2 Also, the year got off to a bad start with prolonged wintry weather into early April. Some businesses have had a difficult time catching up since.

"Spring this year was terrible"
Self catering, North

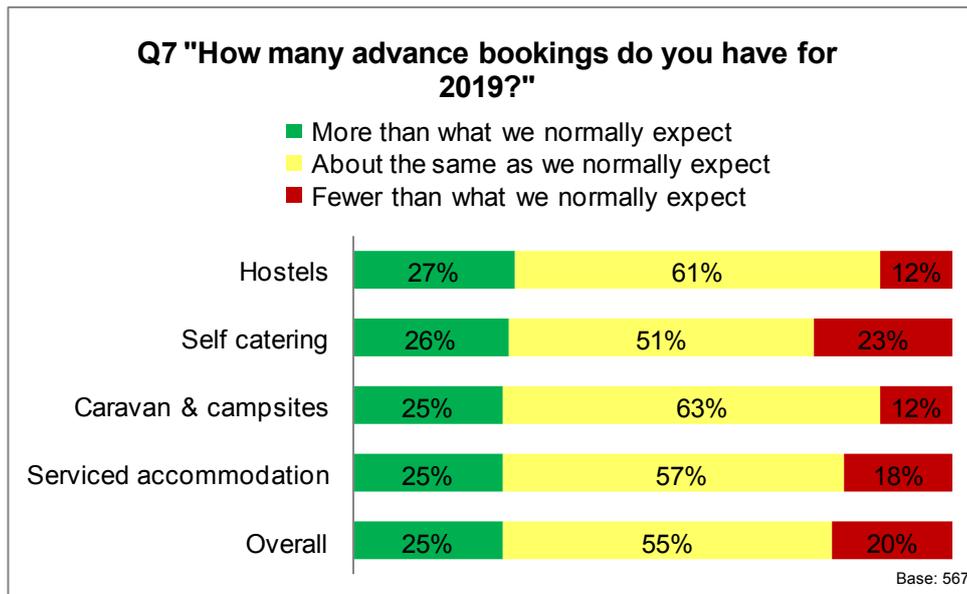
PROFITABILITY TRENDS



Profitability trend closely mirrors visitor volume trend

8.3 Profitability trend suggests that recovery in visitor levels this year has not come at the expense of reducing prices. Some historical results (e.g. during recession) show that maintaining or increasing visitor levels can come at the expense of profitability.

9. ADVANCE BOOKINGS FOR 2019



Advance bookings looking quite healthy for next year

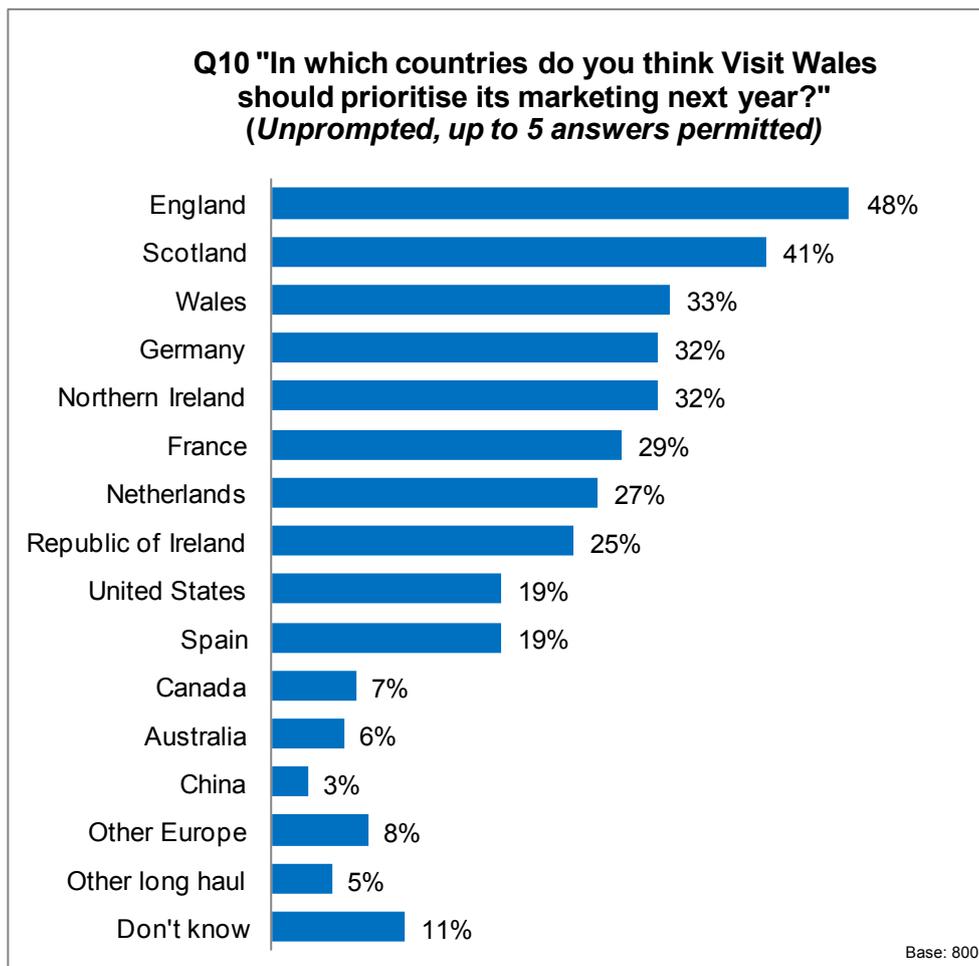
9.1 Advance bookings for accommodation providers are looking quite healthy and stable for next year. Overall, advance bookings are exceeding expectations for a quarter (25%) of businesses, and meeting expectations for over half (55%).

"I'm booked up for 3 months in 2019"
Self catering, South West

"Already several bookings for 2019 – it's looking pleasant"
Serviced, South East

"Already fully booked for summer 2019"
Self catering, South West

10. VISIT WALES MARKETING IN 2019



Strong domestic focus in the industry

10.1 When asked where businesses would like to see Visit Wales prioritise its marketing next year, there is clearly a desire to see a domestic focus.

South East Wales is different though

10.2 South Wales differs from the other regions in that it is much more overseas-focussed. Its results for major European countries & USA do not differ significantly from UK markets. For example, as many (37%) SE Wales businesses say 'Germany' as 'England'. They seem more used to seeing overseas visitors coming for events than other regions.

"Sporting events in Wales – rugby and the Champions League – have brought in a lot more overseas visitors in recent years"
Serviced, South East

Serviced accommodation differs from the other sectors

10.3 The serviced accommodation sector is also more overseas-focussed. Similar to the SE Wales results, the desire to see Visit Wales marketing in major European countries & USA is about equal to UK regions. The other sectors by comparison are much more domestic-focussed.

Some views depend on the outcome of Brexit

10.4 Among those answering 'don't know', there are operators who say that the marketing focus should depend on what happens with Brexit.

"It depends on Brexit"

Serviced, North

"Europeans say they feel unwelcome in the UK since Brexit. I'd like Visit Wales to target more Australians."

Self catering, South East

11. SUGGESTIONS FOR ADVICE AND INFORMATION

11.1 Businesses have been asked what types of advice and information they would find most useful from Visit Wales. We discuss the main themes below.

Many are unsure what to suggest

11.2 Many of the respondents have not given an answer to the question. Among some respondents, there seems to be a lack of awareness of what Visit Wales could potentially do for businesses.

Information which helps visitors is highly appreciated

11.3 Among those giving an answer, one of the common themes is visitor information in the form of maps and brochures. Operators say they appreciate such information which helps their visitors.

“Maps and brochures are very much appreciated by visitors”
Hostel, Mid

“More leaflets and maps are highly appreciated”
Serviced, North

“Visitors like maps and brochures about the Pembrokeshire area while visiting”
Caravan & campsite, South West

“Maps and brochures are useful ... especially about tourist attractions”
Hostel, South West

Operators need more notice about events in the local area

11.4 Many operators would like to have more information in advance regarding events and activities taking place in their local area. This is because they feel having this information will be beneficial for their visitors, in case they cannot find it out for themselves.

“I'd like to have notice of big events, i.e. music festivals, sports events so I can promote this on my website to my guests”
Self catering, South East

“Events are always known last minute, which is frustrating”
Serviced, North

“More detailed list of events in Pembrokeshire. It's not always easy to find the information online”
Caravan & campsite, South West

More online support for businesses and visitors

11.5 Some operators are conscious about the development of technology and Web 2.0. They would like to see Visit Wales increasing promotion of information online through their website and social media.

“More information should be placed online. Young visitors mainly use mobile devices to gather information about tourist attractions.”

Hostel, South East

“More on social media. Information last year on the Year of the Sea was very good”

Caravan & campsite, North

“Online information and services are wanted by the visitors. They use modern technology”

Hostel, South East

Operators pushing for more promotion

11.6 Another recurring theme is that operators would like Visit Wales to increase their promotional efforts, as one operator says the television adverts ‘motivate people’.

11.7 Some say they feel Wales is not promoted as much as other UK nations, and others have said promotion of Wales is selective.

“Promote Mid Wales more ... they just promote South and North, so I am very angry”

Serviced, Mid

“Promote Wales more as we’re not promoted as much as other UK nations”

Activity operator, South East

“Sell Wales more as a nation. Wales has so much to offer and we’re not pushed enough overseas.”

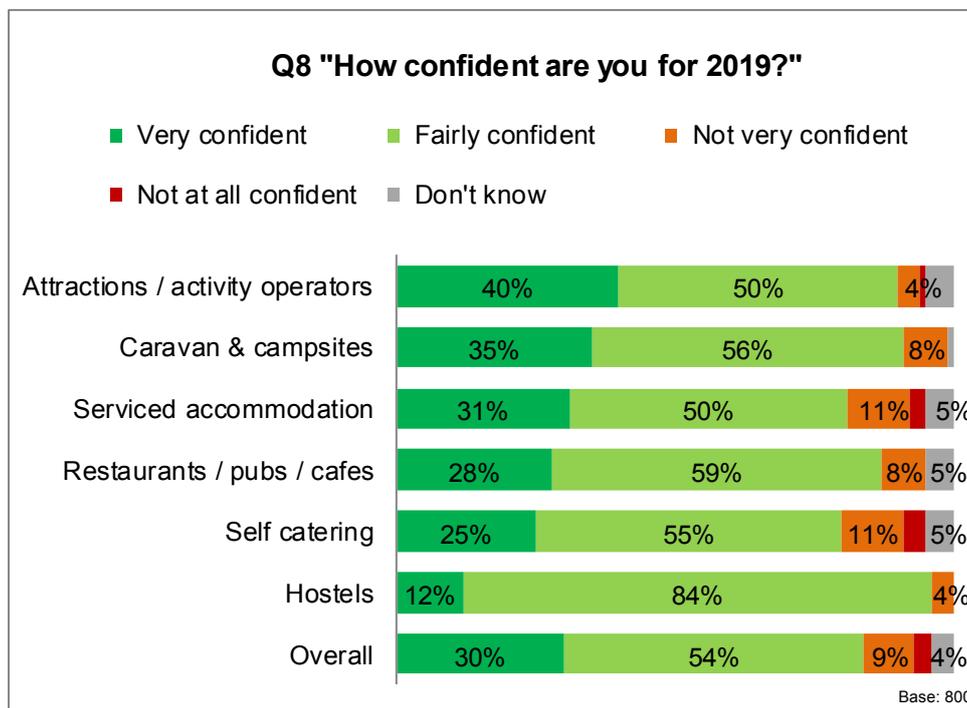
Serviced, South East

“A lot more Americans are coming to the UK due to the strength of the dollar. They go to London then Scotland then Wales. Wales should be promoted more to be the main attraction.”

Restaurant, South East

12. CONFIDENCE FOR 2019

CONFIDENCE BY SECTOR



Confidence for 2019 despite Brexit uncertainty

12.1 The impact of Brexit on the industry may be uncertain, but it is clear that the vast majority (84%) of tourism operators are confident for 2019. This may reflect the number of advance bookings some are seeing.

"We have a lot of bookings already for 2019, so we are very confident"
Caravan & campsite, South West

"I'm confident as we have a lot of weddings booked"
Serviced, South East

"More visitors expected from overseas next year. We already have bookings from Australia and USA."
Hostel, South West

12.2 However, the open comments suggest that some operators are feeling a little uneasy about 2019 because of Brexit, despite the level of confidence displayed in the chart. This is consistent with the findings in the depth interviews.

"Brexit could have an impact next year. Fewer visitors from Europe are expected"
Hostel, South West

“Numbers of visitors from overseas are significantly down this year. We are unsure about numbers next year after Brexit”

Hostel, Mid

“Bookings will depend on Brexit”

Serviced, North

12.3 Some are hoping for another year of warm weather, particularly caravans and campsites.

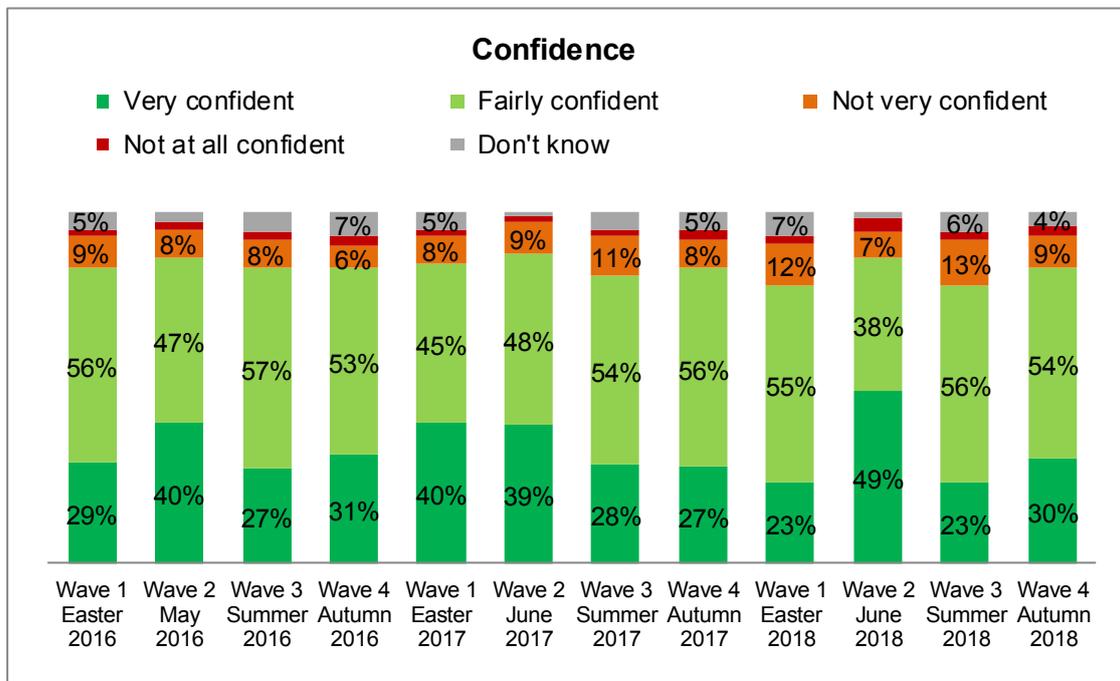
“I feel fairly confident but it’s weather dependent”

Caravan & campsite, North

“Being a campsite business is very weather orientated”

Campsite, South East

CONFIDENCE TREND



Confidence is normal for this time of year

12.4 Confidence for the coming year is very similar to results recorded in autumn 2017 & 2016.

“Business is doing well. Great expectations for next year.”

Restaurant, South East

“I’m very confident based on this year’s performance”

Activity operator, South West

Wales Tourism Business Barometer

Autumn 2018

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

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

- Yes Go to Q2
No Go to Q8

Q2 Compared with the same period last year, how many visitors have you had this autumn?

- More than last year
- About the same as last year.....
- Fewer than last year
- Don't know

Q3 Why would you say you have had more visitors? (UNPROMPTED, TICK ALL THAT APPLY)

- Better weather
- Own marketing.....
- 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 _____

Q4 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
 - Low-priced competition
 - Downturn in tourism in the area.....
 - Fewer overseas visitors.....
 - Fewer British people holidaying in the UK.....
 - Don't know
 - Other
- Please specify other _____

Q5 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"/>

Q6 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

Q7 How many advance bookings do you have for 2019?

- More than what we normally have expected at this time of year
- About the same we would normally have expected at this time of year.....
- Fewer than what we would normally have at this time of year
- Don't know

Q8 How confident are you for 2019?

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

Q9 Interviewer: record all useful comments on performance this autumn, particular markets or confidence for 2019.

Q10 In which countries do you think Visit Wales should prioritise its marketing next year? (Prompt if necessary, tick up to five priorities)

If UK, which countries? If Europe, which countries?

- Wales
- England
- Scotland.....
- Northern Ireland
- Republic of Ireland.....
- Germany
- France
- Netherlands
- Spain
- United States
- Canada
- Australia.....
- China
- Other

Please specify other _____

Q11 What types of information and advice would you find most useful from Visit Wales?

Q12 Could I just confirm whether your business is graded or accredited by Visit Wales?

- Yes.....
- No

Thank you for your time