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Llywodraeth Cymru
Welsh Government

Statutory Licensing Scheme for Visitor Accommodation Providers

Views of Consumers and Residents

Report

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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Background and Methodology



Background

The Welsh Government is working on proposals for a Statutory Licensing Scheme for all visitor accommodation providers in Wales. The scheme would compel anyone offering accommodation to the public to acquire a license to operate.

As part of the policy development process they are looking to gather some consumer insight into how a license scheme might affect visitor perceptions of the accommodation offer in Wales.

To understand the views of the public, the Welsh government have commissioned BVA BDRC to conduct bespoke quantitative research.

Methodology

The research for this project was conducted by BVA BDRC – an independent market research company - via their ClearSight online survey – a monthly nationally representative survey that focusses on the UK public's attitudes to travel and leisure. The ClearSight survey is co-sponsored by VisitEngland, Visit Wales and VisitScotland, and includes a number of questions on domestic tourism intentions in the coming year.

- The study ran from the 1st September to 7th September 2023
- 2,557 respondents completed these survey, of whom 1,022 live in Wales
- The data has been weighted by age, gender, social grade and region so it is nationally representative of the UK population. Data is weighted separately for Wales, England, Scotland and Northern Ireland.

Definitions used within this report

This report uses a number of categorisations that may need clarification for the reader.

In the first chapter we use the term 'social grades' Social Grade is a classification system based on occupation and broadly aligns with income. It has been used as a standard within market research for a number of decades to build an understanding of respondents alongside a number of other factors. Broadly, social grades are outlined as below:

- A Higher managerial, administrative and professional
- B Intermediate managerial, administrative and professional
- C1 Supervisory, clerical and junior managerial, administrative and professional
- C2 Skilled manual workers
- D Semi-skilled and unskilled manual workers
- E State pensioners, casual and lowest grade workers, unemployed with state benefits only

We also provide regional breakdowns of Wales residents as defined below. Unitary authorities are merged to generate sufficient base sizes for robust analysis

- **North Wales:** Conwy County Borough Council, Denbighshire County Council, Flintshire County Council, Gwynedd Council, Isle of Anglesey County Council, Wrexham County Borough Council
- **Mid Wales:** Ceredigion County Council, Powys County Council
- **South West Wales:** Carmarthenshire County Council, Neath Port Talbot County Borough Council, Pembrokeshire County Council, City and County of Swansea
- **South East Wales:** Blaenau Gwent County Borough Council, Bridgend County Borough Council, Cardiff Council, Caerphilly County Borough Council, Merthyr Tydfil County Borough Council, Monmouthshire County Council, Newport City Council, Rhondda Cynon Taf County Borough Council, The Vale of Glamorgan County Borough Council, Torfaen County Borough Council

Key findings



Key findings (1)

Attitudes amongst domestic trip-takers

1. Compliance with health and safety requirements is clearly important for domestic trip intenders when booking accommodation. Accommodation that is 'operating safely' is considered important for the vast majority (89%) – marginally ahead of 'positive reviews' (88%) and comfortably ahead of being 'environmentally friendly' (73%). 'The ability to raise concerns or complaints about standards with an independent body' is regarded as important for 3 in 4 (76%).
2. Notably, of the different conditions measured, 'accommodation *not* operating safely' was regarded as the leading factor that would put intenders off booking accommodation – 59% saying they would probably/definitely not book in this scenario – ahead of 'not offering good value for money' (56%). 'Not providing the ability to raise concerns with an independent body' was regarded as less off-putting, although a notable 44% stated it would mean they'd probably/definitely not book.
3. The majority (62%) of domestic trip intenders are not aware that there is currently no scheme requiring accommodation providers to confirm they meet certain health and safety requirements to operate. This rises considerably amongst those who would not book accommodation if the venue is 'not operating safely' (80%) or if there is no 'ability to raise concerns about standards' (78%).
4. Perhaps unsurprisingly given its perceived importance, a majority (83%) of domestic trip intenders stated they would be 'more likely' to book accommodation if there was a legal requirement to confirm compliance with health and safety. A slightly larger majority (85%) stated they would be 'more confident' in their personal safety if this legal requirement existed.
5. When asked the relative importance of different elements to be included within health and safety requirements, a majority saw all those we tested as very/fairly important. 'Gas safety', 'electrical safety', 'fire risk assessment' and 'food hygiene' were deemed the most important – more than 4 in 5 regarding them as 'very important'. Other areas tested included 'water safety', 'legionella risk assessment', 'insurance' and 'ability to raise concern with an independent body'. In addition to those tested, trip intenders suggested a range of other potential areas including 'accessibility standards', 'child safety' and 'local crime levels'.

Key findings (2)

Attitudes amongst Welsh residents

1. Nearly 3 in 5 (59%) Welsh residents believe they get 'some' or 'a lot of' tourism in their local area, rising to 7 in 10 (70%) of residents of North Wales.
2. Of those that attract at least 'some' tourism to their local area, there is a general perception that the number of accommodation providers has increased in the last 5 years or so – highest amongst residents of North and Mid Wales.
3. The biggest perceived negative impacts of increasing visitor accommodation is 'litter or pollution' (50% seeing it as having a fairly/very negative impact), 'ease of parking' (47%) and 'ability of local people to find a house to rent or buy in the community' (41%). The biggest perceived positive impact of increasing visitor accommodation is to 'the local economy' (69% seeing it as having a very/fairly positive impact). There is also a net positive impact on 'health and safety', although the largest number of residents see the effect as relatively neutral in this area.
4. Similar to domestic trip intenders, most Wales residents (71%) were unaware there is no scheme requiring accommodation providers to confirm compliance with health and safety requirements to operate. When asked what impact such a scheme would have on their local area, the response was broadly positive. Nearly 7 in 10 (68%) believe it would have a positive impact on 'health and safety' – believing such a scheme would drive up standards and ensure compliance. Around two-thirds (65%) believe that it would have a positive impact on 'the local economy', perhaps driven by a sense that improved standards would also encourage more tourism. There were very few perceived negative impacts of such a scheme – the most negative being its impact on 'ability of local people to find a house to rent or buy in the local community' (just 17% negative and 49% positive).

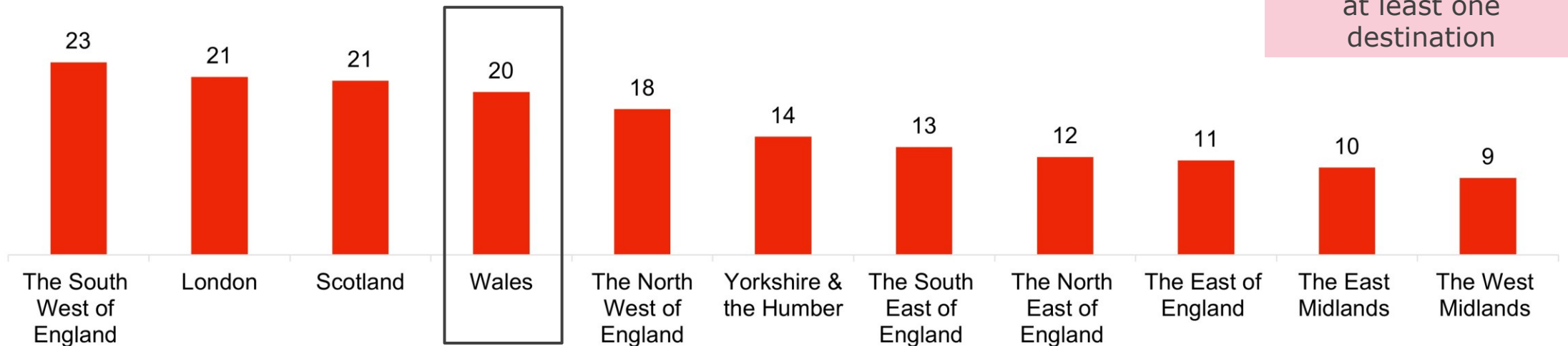
Setting the context: Respondent demographics and tourism intentions



Destinations for a UK short break or holiday

- The South West of England is the most popular destination for a UK overnight trip in the next few years - just under 1 in 4 (23%) very likely to go to this region. Wales is near the top for consideration, with 20% very likely to go there for an overnight visit in the next few years.

Figure 1. Destinations respondents very likely to take a holiday/short break in next few years, Percentage, All respondents



68%
'very likely' to visit
at least one
destination

A4. How likely or unlikely are you to go on a short break or holiday in the following parts of the UK in the next few years? Base:
All respondents n=2,557

Gender and life stage

- The gender split of respondents is relatively even across each of the sub-groups featured within this report. The age profile is also relatively consistent across audiences – around a third aged 16-34 and a further third 35-54.

Figure 2. Gender of respondents , Percentage, All respondents

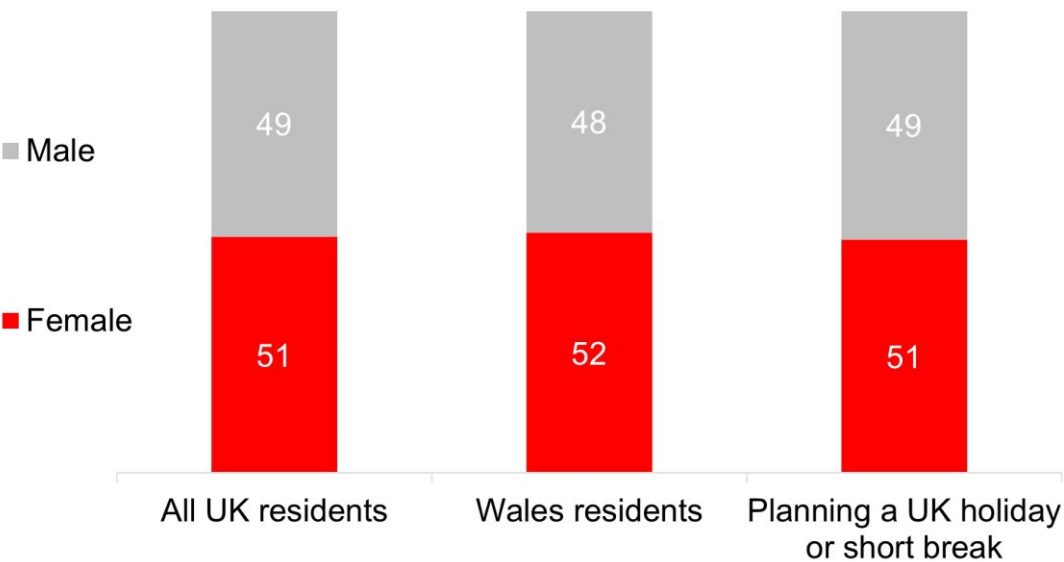
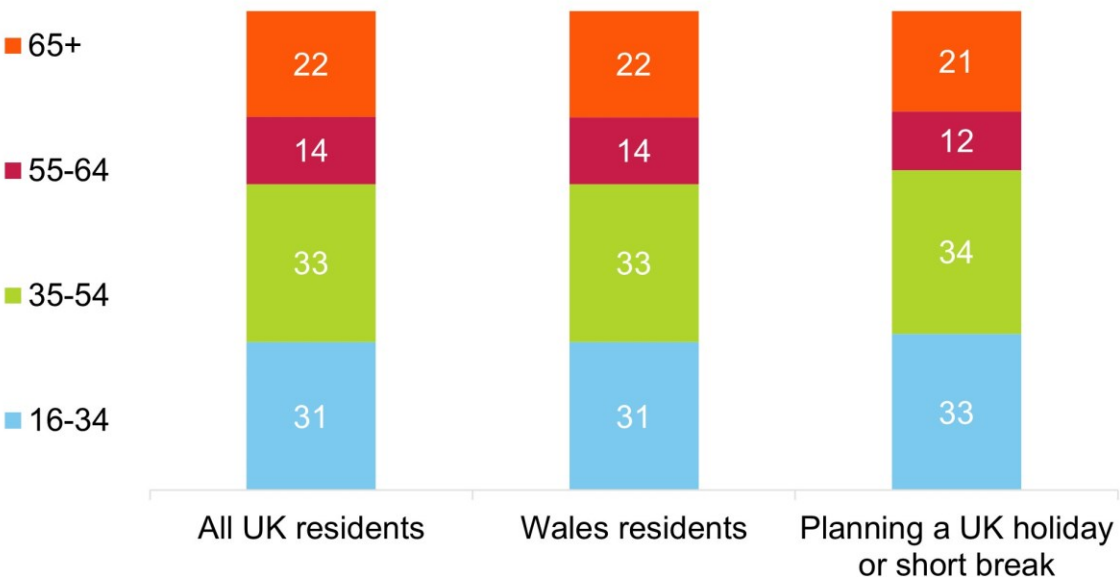


Figure 3. Age of respondents, Percentage, All respondents



Q4: Are you...? (Gender) Q2: Which of the following age groups are you in? (Age)
Base: All UK residents n=2,557; Wales residents n=1,022; Planning a UK holiday or short break n=1,700

Household income and social grade

- Around half of all UK residents belong to high social grades ABC1, relatively consistent across each sub-group featured in the research, although those planning a trip index slightly higher amongst these audiences.
- Those planning a domestic break tend to have higher household incomes than the broader population.

Figure 4. Social grade of respondents , Percentage, All respondents

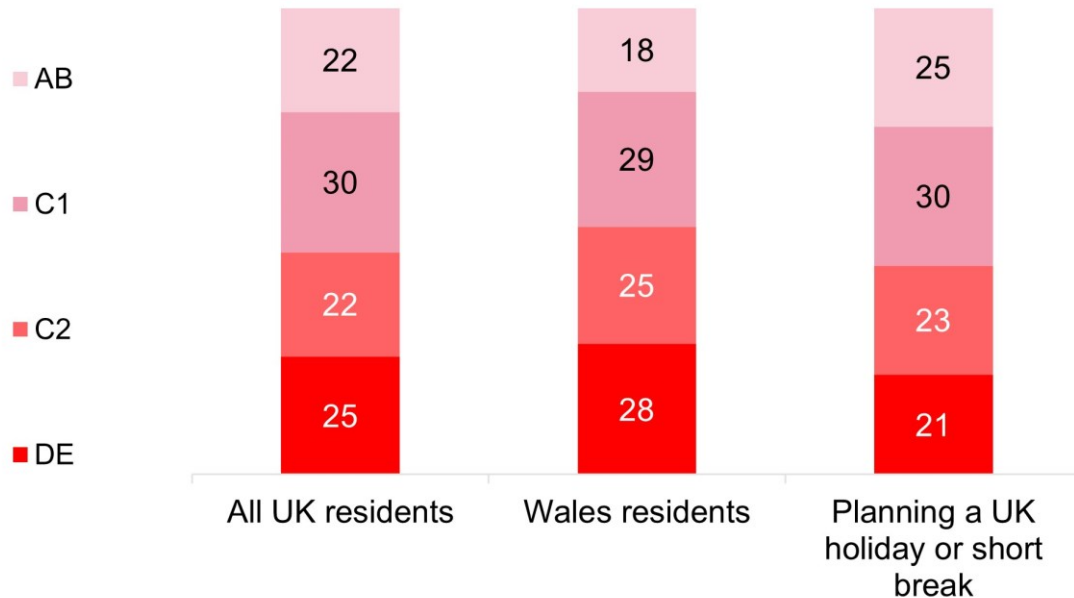
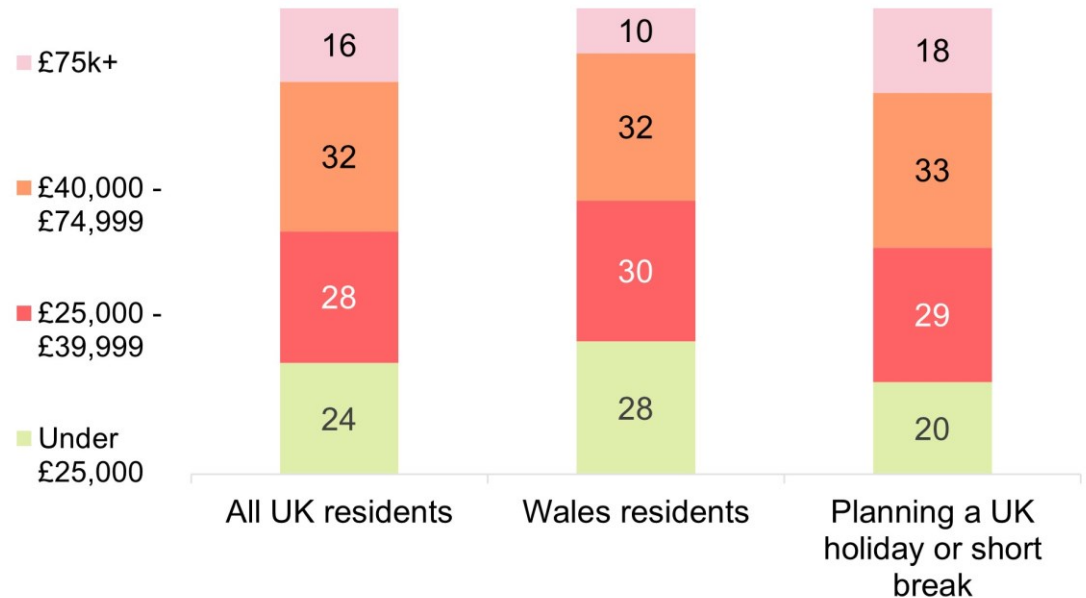


Figure 5. Household income of respondents, Percentage, All respondents



Q15: Which of these most clearly applies to your occupation? QGBP: Into which of the following categories does your total yearly household income before taxes fall?

Base: All UK residents n=2,557; Wales residents n=1,022; Planning a UK holiday or short break n= 1,700

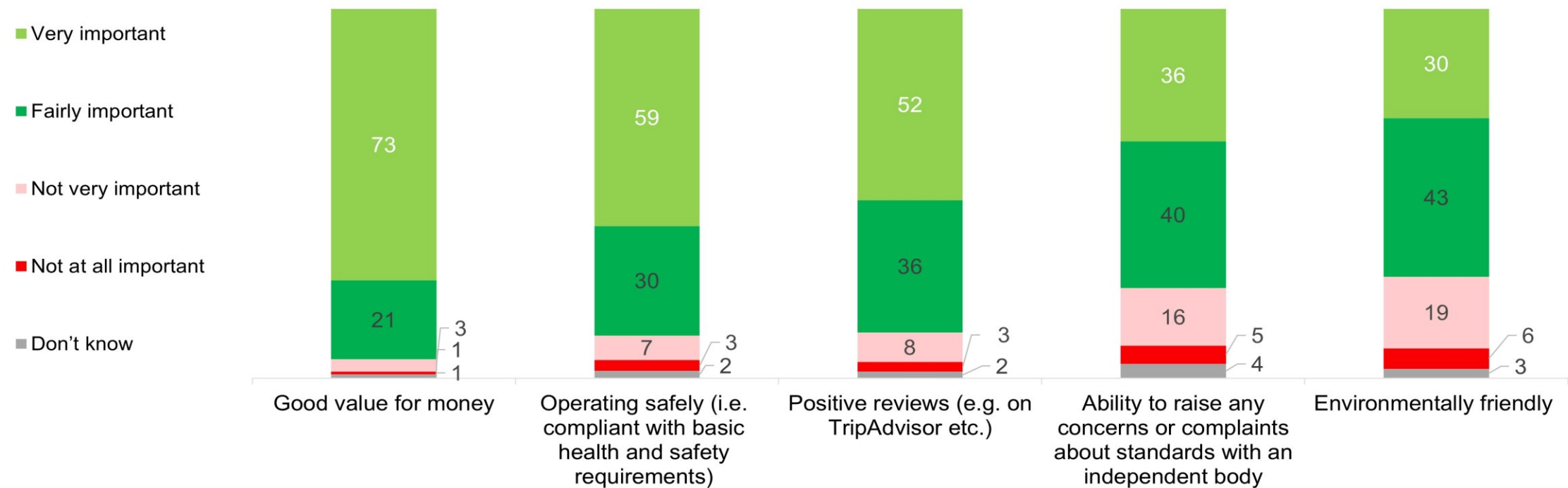
Attitudes amongst domestic trip-takers



What is important when booking visitor accommodation

- Unsurprisingly, ‘good value for money’ is the most important factor (of those tested) when booking visitor accommodation.
- In relation to health and safety factors, ‘operating safely’ is important for the vast majority (89% stating it is ‘very/fairly important, of whom 59% see it as ‘very important’), as is ‘ability to raise any concerns or complains about standards with an independent body’ (76% important; 36% very important).

Figure 6. Ratings of importance of factors when booking visitor accommodation, Percentage, All intending a UK short break or holiday



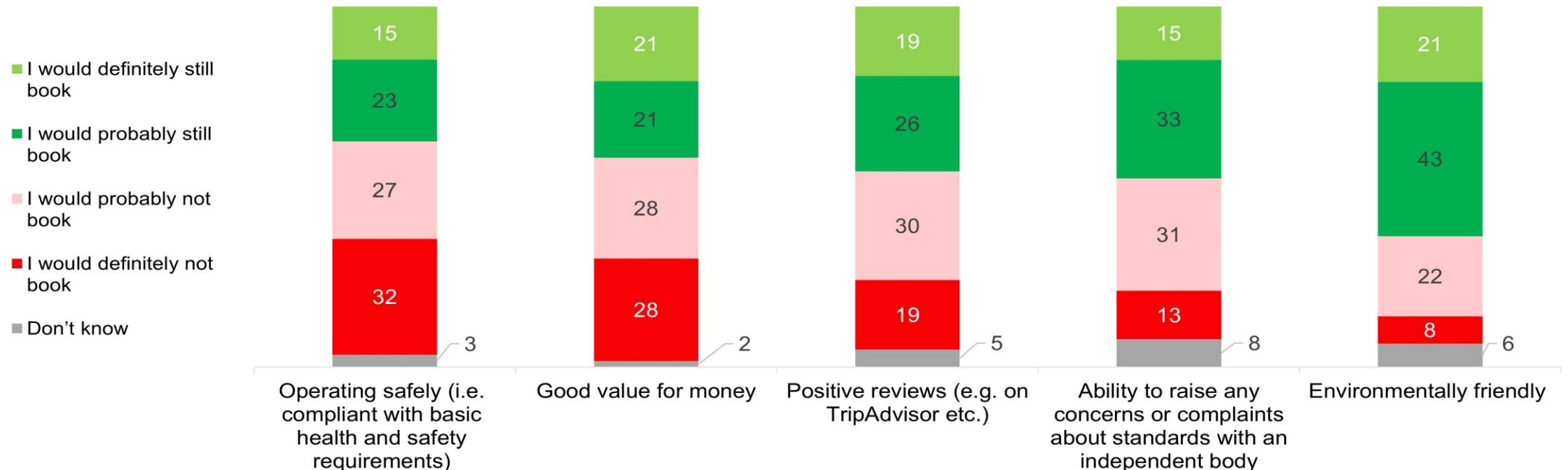
A5. How important, if at all, are the following when you are booking visitor accommodation for a holiday or short break in the UK?
Base: All intending a UK holiday or short break in the next 12 months n=1,700



Booking likelihood without stated standards in place

- Notably the biggest factor that would *put off* a UK trip-taker from booking a domestic break is if it was not 'operating safely' - nearly half saying they would definitely/probably not do so in this scenario. The 'ability to raise concerns about standards with an independent body' is less off-putting (only not being 'environmentally friendly' ranked lower), although a notable 44% still state they would probably/definitely not book in this instance.

Figure 7. Likelihood of booking accommodation if venue did not fulfil these conditions, Percentage ranked on 'would definitely not book', All intending a UK short break or holiday



A6. How likely or unlikely would you be to book accommodation on a UK short break or holiday if it was not...?
Base: All intending a UK holiday or short break in the next 12 months n=1,700

Awareness of no scheme requiring accommodation to confirm they meet health and safety requirements to operate

- The majority of UK residents (62%) planning a UK overnight break are not aware that there is no scheme requiring all visitor accommodation providers to confirm they meet health and safety requirements to operate. Awareness is notably lower amongst those that would not book if a venue was not operating safely or did not offer ‘the ability to raise concerns about standards to an independent body’.

Figure 8. Awareness of no scheme requiring accommodation to confirm they meet health and safety requirements to operate, Percentage, All intending a UK short break or holiday

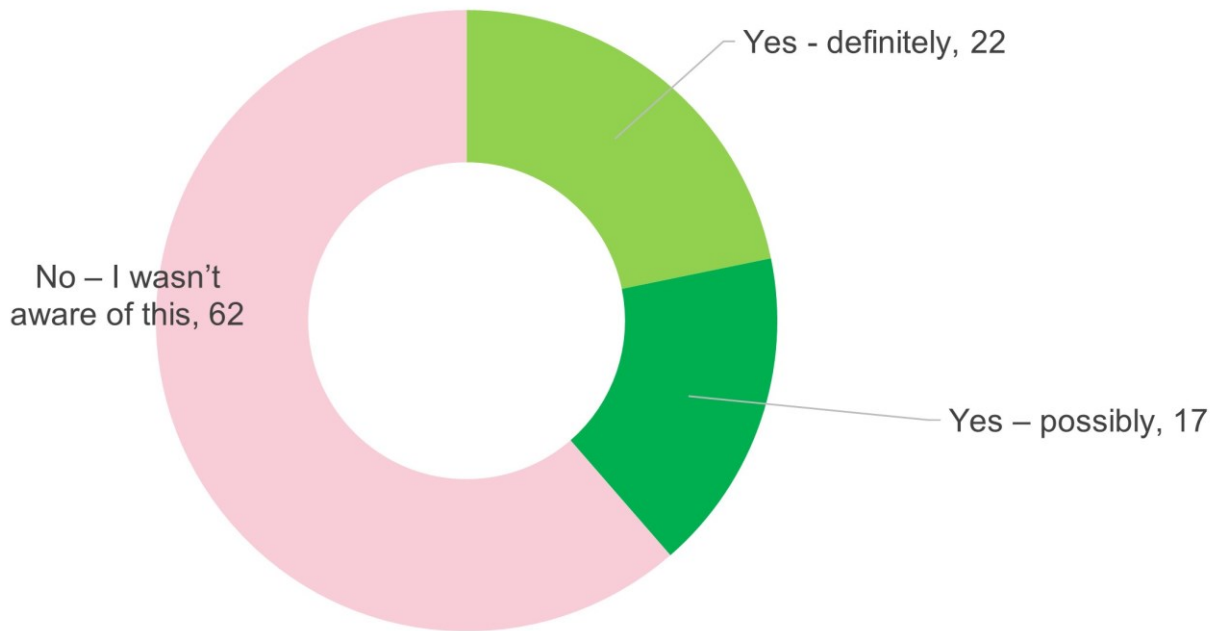


Table 1. Awareness of lack of health and safety scheme by sub-groups

	All whom would not book if accommodation not 'operating safely'	All whom would not book if no 'ability to raise concerns about standards'
Yes – definitely	12%	14%
Yes – possibly	8%	9%
No – I wasn't aware of this	80%	78%

A7. There is currently no scheme requiring all visitor accommodation providers to confirm they meet certain requirements (e.g. basic health and safety) to operate. Is this something you were aware of before filling out this questionnaire?

Base: All intending a UK holiday or short break in the next 12 months n=1,700



Impact of potential health and safety scheme on trip-bookers

- The majority of domestic trip intenders state they would be more likely to book accommodation (83%) and that they would be more confident in their personal safety (85%) if the accommodation provider was legally required to confirm compliance with basic health and safety requirements to operate.

Figure 9. Likelihood of booking with legal requirement to confirm compliance with health safety, Percentage, All intending a UK short break or holiday

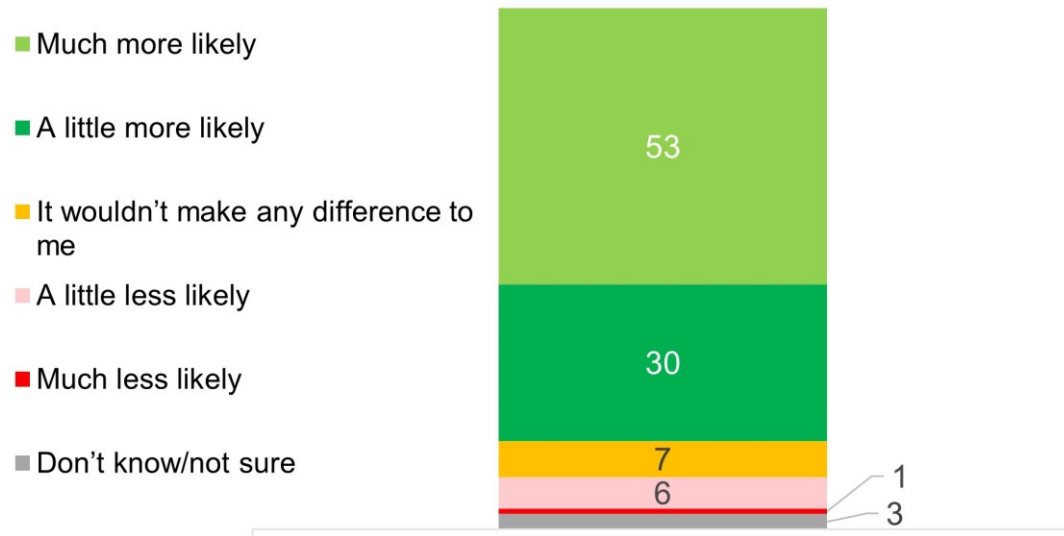
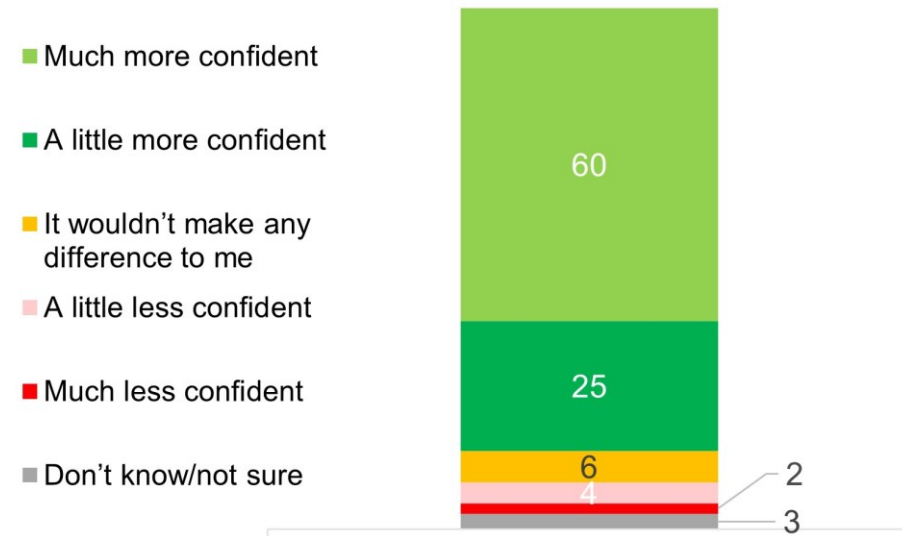


Figure 10. Confidence in personal safety with legal requirement to confirm compliance with health safety, Percentage, All intending a UK short break or holiday



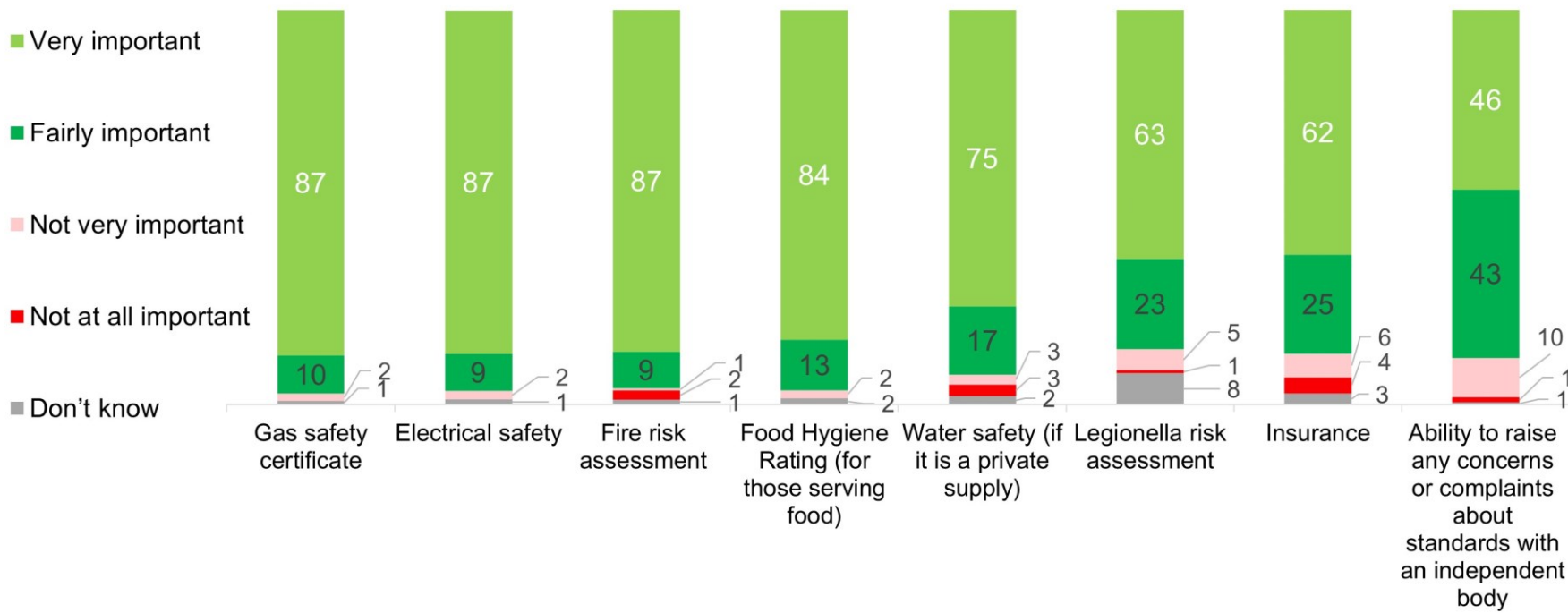
A8. If accommodation providers were legally required to confirm that they comply with basic health and safety requirements (e.g. through a Statutory Scheme) to operate, how much more or less likely would you be to book a holiday or short break with them? A9. How much more or less confident would you be in your personal safety if the visitor accommodation you were staying at was legally required to confirm that they comply with basic health and safety requirements, to operate (e.g. through a Statutory Scheme)?

Base: All intending a UK holiday or short break in the next 12 months n=1,700

What health and safety elements are important when booking accommodation

- The vast majority of domestic trip intenders see all tested areas as important for accommodation providers to confirm they comply with basic health and safety requirements. Gas safety certificate, electrical safety, fire risk assessment and food hygiene ratings are the most important. The ability to raise concerns or complaints with an independent body is deemed the least important, although still important to a majority. A range of other areas were also suggested, including 'accessibility standards', 'child safety', and 'crime levels'.

Figure 11. Areas of importance when confirming compliance with basic health and safety requirements, Percentage, All intending a UK short break or holiday



Other suggestions*

"Accessibility standards"
 "Child safety"
 "Emergency exits"
 "General cleanliness"
 "Height of rooms"
 "Local crime levels"
 "Mold detection"
 "Security in premises"
 "Noise pollution"
 "Carbon monoxide monitoring"

A10. If all accommodation providers were legally required to confirm they comply with basic health and safety requirements, to operate (e.g. through a Statutory Scheme), how important or unimportant would it be for each of these elements to be included? Please answer in relation to how important it would be to you as someone who would potentially stay in UK accommodation

Base: All intending a UK holiday or short break in the next 12 months n=1,700

*Other suggestions are predominantly single comments so have not been coded into percentages

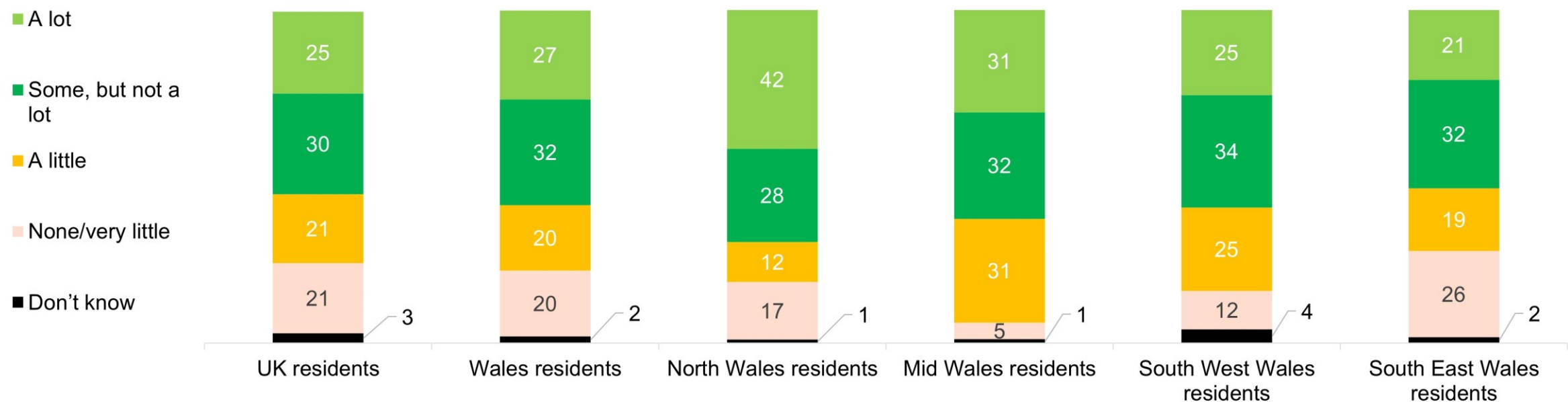
Attitudes amongst Welsh residents



Amount of tourism in local area and impact on accommodation providers

- 1 in 4 (25%) of the UK public believe they get ‘a lot’ of tourism in their local area, similar in Wales (27%). Of the Wales residents that get some or lots of tourism in their area, more have noticed an increase in accommodation providers than have noticed a decrease (net +20).

Figure 12. Amount of tourism in local area, Percentage, All residents



A1. In your opinion, how much tourism do you get in your local area?
Base: UK residents n=2,557; Wales residents n=1,700; North Wales residents n=184; Mid Wales residents n=57; South West Wales residents n=223; South East Wales residents n=558

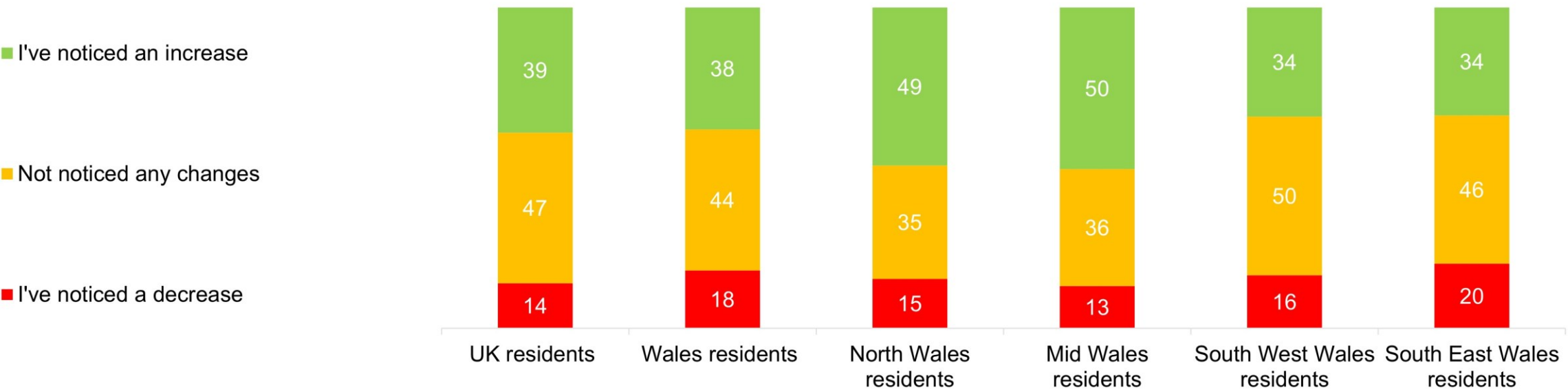
For regional definitions see page 5
Note: Responses were geographically sampled at random so will not be fully representative of Wales regions. Data is therefore indicative only



Amount of tourism in local area and impact on accommodation providers

- 1 in 4 (25%) of the UK public believe they get ‘a lot’ of tourism in their local area, similar in Wales (27%). Of the Wales residents that get some or lots of tourism in their area, more have noticed an increase in accommodation providers than have noticed a decrease (net +20).

Figure 13. Change in number of overnight accommodation providers in local area in last 5 years, Percentage, All residents with some/lots of tourism in their area



A2: Have you noticed any changes in the number of overnight visitor accommodation providers (e.g. Hotels, B&Bs, self-catering lets, campsites, etc) in your local area in the last 5 years or so?

Base: UK residents with lots of tourism in their area n=1,447; Wales residents with lots of tourism in their area n=583; North Wales residents n=131; Mid Wales residents n=39*; South West Wales residents n=131; South East Wales residents n=282

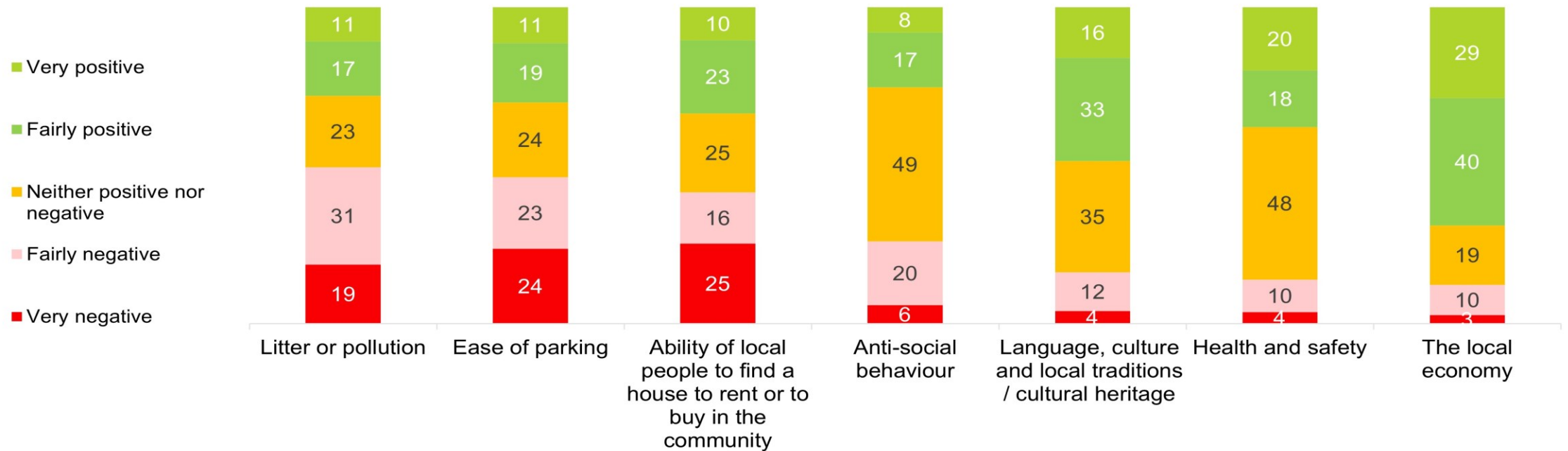
*Low base sizes – treat with caution. Note: Responses were geographically sampled at random so will not be fully representative of Wales regions. Regional data is therefore indicative only.



Impact of increasing accommodation in local area

- The increase in visitor accommodation has had a number of perceived negative impacts on Wales tourism areas – ‘litter or pollution’, ‘ease of parking’ and ‘ability of local people to find a house to rent or buy’ the leading areas. There is only a limited perceived negative impact on health and safety – the most popular answer to this ‘neither positive nor negative’. The perceived impact on the local economy is very/fairly positive.
- The pattern is relatively consistent across regions of Wales, although negative perceptions are stronger in North Wales.

Figure 14. Impact of increasing visitor accommodation in area, Percentage ranked on negative impact, All Wales residents reporting an increase in overnight visitors in their area (Don't know responses removed)



A3. From your understanding, how positive or negative an impact has the increase in overnight visitor accommodation had on your local community in terms of...?

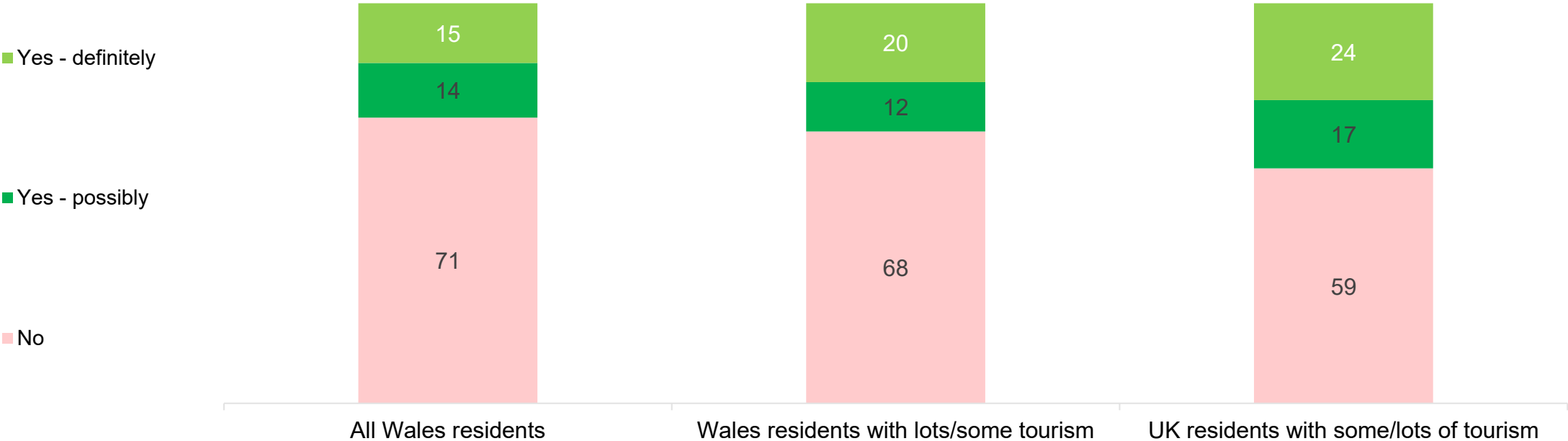
Base: All Wales residents reporting an increase in overnight visitor accommodation in their local community n=c.200 per statement

Note: Responses were geographically sampled at random so will not be fully representative of Wales regions. Regional data is therefore indicative only.

Residents' awareness of no scheme requiring accommodation to confirm they meet health and safety requirements to operate

- Similar to overnight domestic trip intenders, the vast majority of Wales residents – with or without tourism in their area – are unaware that there is currently no scheme requiring all visitor accommodation providers to confirm compliance with health and safety requirements

Figure 15. Residents' awareness of no scheme requiring accommodation to confirm they meet health and safety requirements, Percentage, All Wales residents with lots/some tourism in their areas



A7. There is currently no scheme requiring all visitor accommodation providers to confirm they meet certain requirements (e.g. basic health and safety) to operate. Is this something you were aware of before filling out this questionnaire?

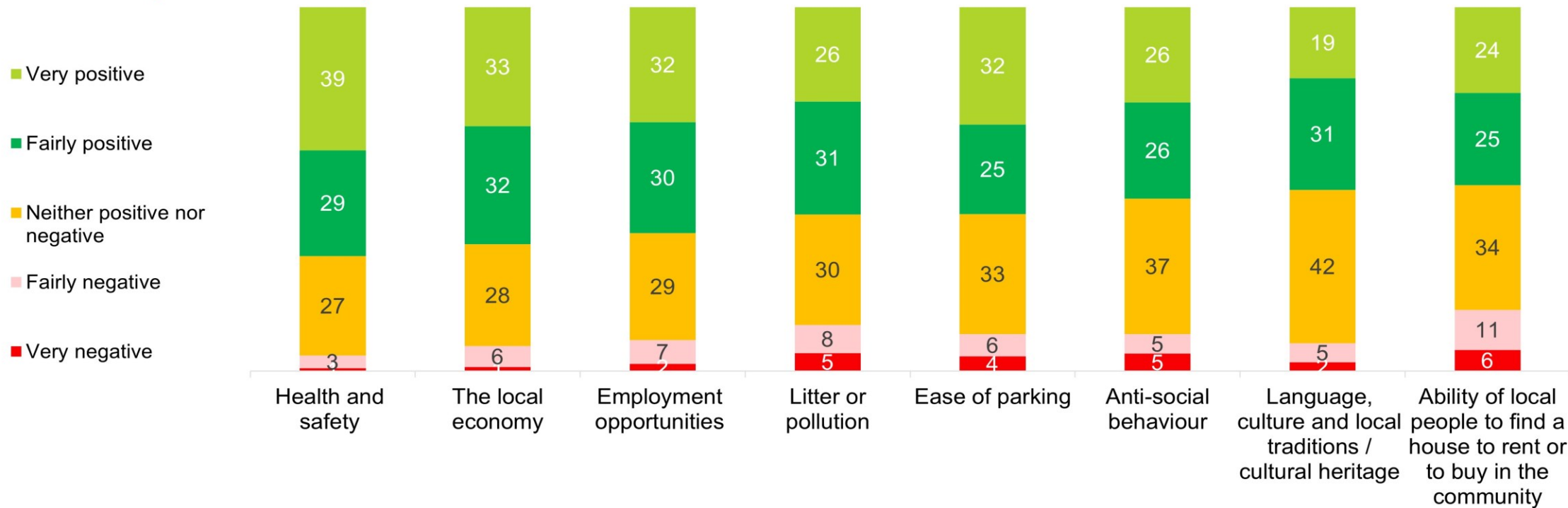
Base: All Wales residents n=583



Impact of introducing a Statutory Scheme concerning confirmation of health and safety compliance

- Welsh residents perceive the introduction of a health and safety Statutory Scheme as broadly positive on all areas within their community. Very few see it as negative in any way.
- Positivity is felt across regions within Wales, although marginally less so in North Wales.

Figure 16. Impact of introducing a Statutory Scheme concerning confirmation of health and safety compliance, Percentage, All Wales residents reporting an increase in overnight visitors in their area (Don't know responses removed)



A13. And how positive or negative an impact do you think a Statutory Scheme around confirmation of health and safety compliance for visitor accommodation would have on your local area in terms of...?

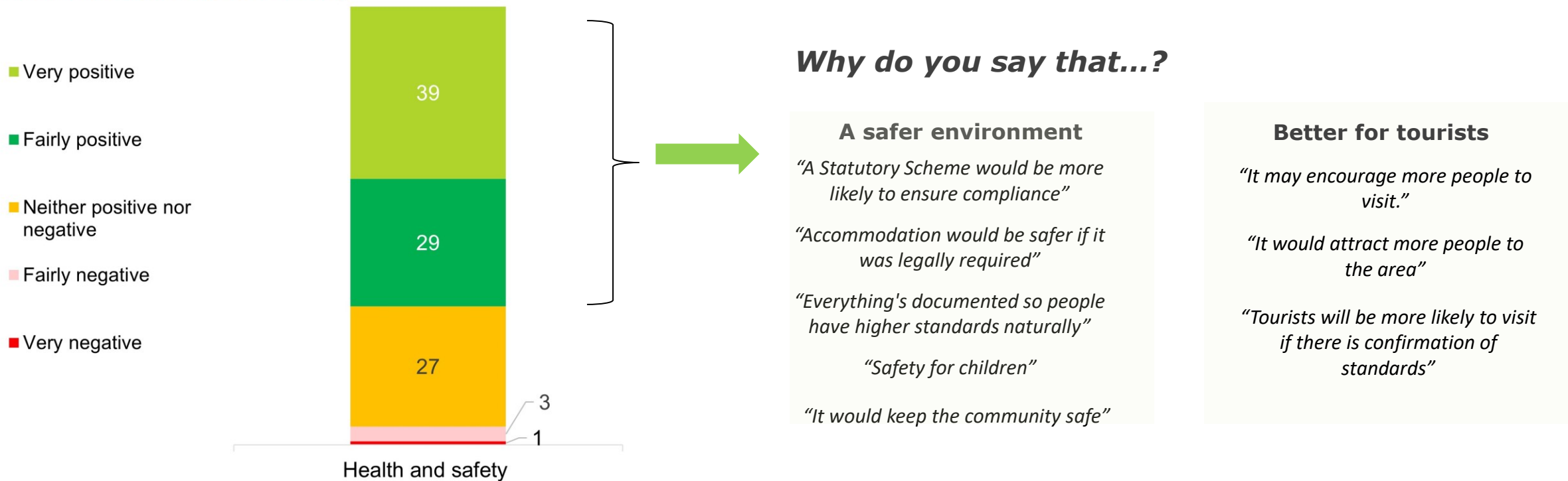
Base: All Wales residents with lots/some tourism in their area n=c.500 – don't knows removed.



Response to introducing a Statutory Scheme concerning confirmation of health and safety compliance

- Impact of introducing a Statutory Scheme concerning confirmation of health and safety compliance positive impact on their local area, the most common response was that it would drive up safety standards. Some also felt this would attract more tourists to the area.

Figure 17. Response to introducing a Statutory Scheme concerning confirmation of health and safety compliance, Percentage, All Wales residents reporting an increase in overnight visitors in their area (Don't know responses removed)



A13. And how positive or negative an impact do you think a Statutory Scheme around confirmation of health and safety compliance for visitor accommodation would have on your local area in terms of...?

Base: All Wales residents with lots/some tourism in their area n=c.500 – don't knows removed.

Appendix 1



Statistical significance

The table below outlines the statistical reliability of survey responses. The examples used are not exhaustive but have been selected to illustrate varying confidence at a range of different sample sizes.

Base	Survey finding of...		
	5 / 95%	20 / 80%	50 / 50%
Domestic trip intenders (1,700)	+/- 1.0%	+/- 1.9%	+/- 2.4%
Wales residents (1,022)	+/- 1.3%	+/- 2.5%	+/- 3.1%
North Wales residents (184)	+/- 3.1%	+/- 5.8%	+/- 7.2%
Mid Wales residents (57)	+/- 5.7%	+/- 10.4%	+/- 13.0%
South West Wales residents (223)	+/- 2.9%	+/- 5.3%	+/- 6.6%
South East Wales residents (558)	+/- 1.8%	+/- 3.3%	+/- 4.1%