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Wales Tourism Business Survey
Wave 1, 2013
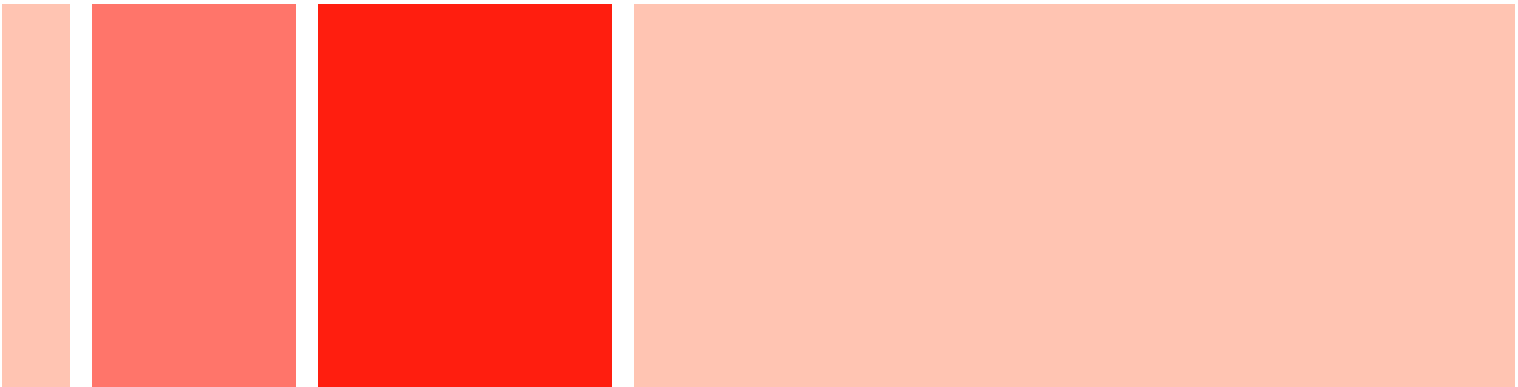
Wales Tourism Business Survey – Wave 1, 2013

Research on behalf of Visit Wales

Sarah McDonough, Beaufort Research Ltd.

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

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SURVEY QUESTIONNAIRE

1. INTRODUCTION AND OBJECTIVES

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

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

To achieve the required quick turnaround, a strict timetable is adhered to for each wave of the survey. Fieldwork is scheduled to take place immediately following a given date – this report relates to the Easter holiday period. The research data is supplied by the end of the week of fieldwork, with a full report completed by early the following week.

The subject areas covered in Wave 1 of the Business Tourism 2013 survey are:

Business confidence
Number of guests / visitors compared to the previous year and confidence in the 2013 summer season

Advertising and promotion
Use of online marketing tools, as well as printed materials, TICs and letting agents to promote the business, plus monitoring of how customers came to hear about the business

Online verses Printed Material in Marketing
Perceived effectiveness of online marketing compared to printed brochures and leaflets

Customer Review Sites
Perceived usefulness of customer review websites such as Trip Advisor

This report contains the main findings arising from the survey.

2. METHODOLOGY

The survey was conducted via telephone using CATI (Computer Assisted Telephone Interviewing) technology from the Beaufort Research dedicated interviewing unit. Interviews took around 5 – 8 minutes to complete and all respondents were offered the choice of conducting the interview in the language if their choice, English or Welsh. A total of 4% of the sample undertook the interview in Welsh; take-up of this option was highest in North Wales (8%), and lowest in South East Wales (1%).

A total of **406 interviews** were conducted, and fieldwork took place on 8th and 9th April 2013. This report was produced pm Monday 15th April; the quick turnaround was due to the excellent response from the businesses that were eager and willing to take part.

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

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

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

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

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

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

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

Table 1 – interviews achieved by business type and region

Business Type	Region				
	North	**Mid**	**South West**	**South East**	**TOTAL**
Attractions	29	11	21	18	79
Accommodation – serviced	46	29	29	33	137
Accommodation – self-catering	45	26	36	22	129
Accommodation - caravans	15	19	22	5	61
TOTAL	135	85	108	78	406

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

3. KEY FINDINGS

Business Confidence

- Nearly half (49%) of all businesses established longer than 12 months had received fewer guests / visitors this Easter compared to last Easter. A further third (34%) received about the same amount, while only 14% said they had received more guests / visitors this year compared to last year. Visitor numbers were more likely to be higher than last year for attractions (28% saying more) and lower than last year for caravan sites (82% saying fewer).

- For businesses receiving more guests / visitors this year, better weather (17%) and marketing efforts (13%) were felt to have contributed to the increase in numbers. On the other hand, for those businesses that had received fewer guests, the poor weather was seen to be the main cause for this (79%).

- Closely linked to guest / visitor numbers, half of the businesses interviewed reported lower turnover this Easter compared to last Easter (50%), with a quarter saying that turnover this year was the same (26%), and only 17% saying it was higher.

- Despite the general downturn in number of guests / visitors this Easter compared to last Easter, most businesses were confident about the upcoming summer season (73%), with 21% very and 52% fairly confident. However, a sizable minority of one in five (21%) were not confident for the summer.

Advertising and Promotion

- Overall, 89% of businesses used online marketing, while 57% used offline sources. This broke down as follows:
    - o   34% only used online sources
    - o   2% only used offline sources
    - o   55% used both.

- A further 7% of businesses did not intend to actively market their business, instead relying upon repeat business, customer recommendations and passing trade.

- The vast majority of businesses marketing their business online used their own website (96%), while eight in ten used the Visit Wales website or other tourism websites such as lastminute.com and their local authority website (81% for each).

- Amongst those businesses that intended to promote their business using printed materials and business recommendations, most used Tourist Information Centres (85%), while three quarters printed leaflets for their business (76%).

- When asked to consider which method they felt would win the most business, online sources were felt to be more effective than offline. The most effective online marketing method was felt to be the business' own website (38%), while leaflets were considered the most effective offline method (10%).

- Most businesses actively monitored how their guests / visitors heard about them (81%) – 45% said that they did this all the time, while 36% did it sometimes. However, nearly one in five (18%) reported that they did not monitor how their guests / visitors heard about them.

Online versus Printed Material in Marketing

- Attractions were much more positive about the role of printed material in promoting their businesses; the vast majority (95%) <u>agreed</u> that *"Leaflets / printed brochures are still important to many customers, in spite of the popularity of the internet"*, while only 64% of accommodation businesses agreed with this.

- Conversely, while 82% of attractions <u>disagreed</u> with the statement *"It's not worth me producing leaflets / printed brochures anymore as most people search online"*, only around a third of accommodation businesses disagreed with this (31%) – 57% of these businesses agreed with this statement.

Customer Review Sites

- On the whole, opinion was divided on the usefulness of customer review sites; while nearly half (48%) of all businesses thought they were useful (21% very useful; 27% fairly useful), around a third (31%) did not think they were particularly useful for their business (9% not very useful; 22% not at all useful). A sizeable proportion, however, did not know (21%).
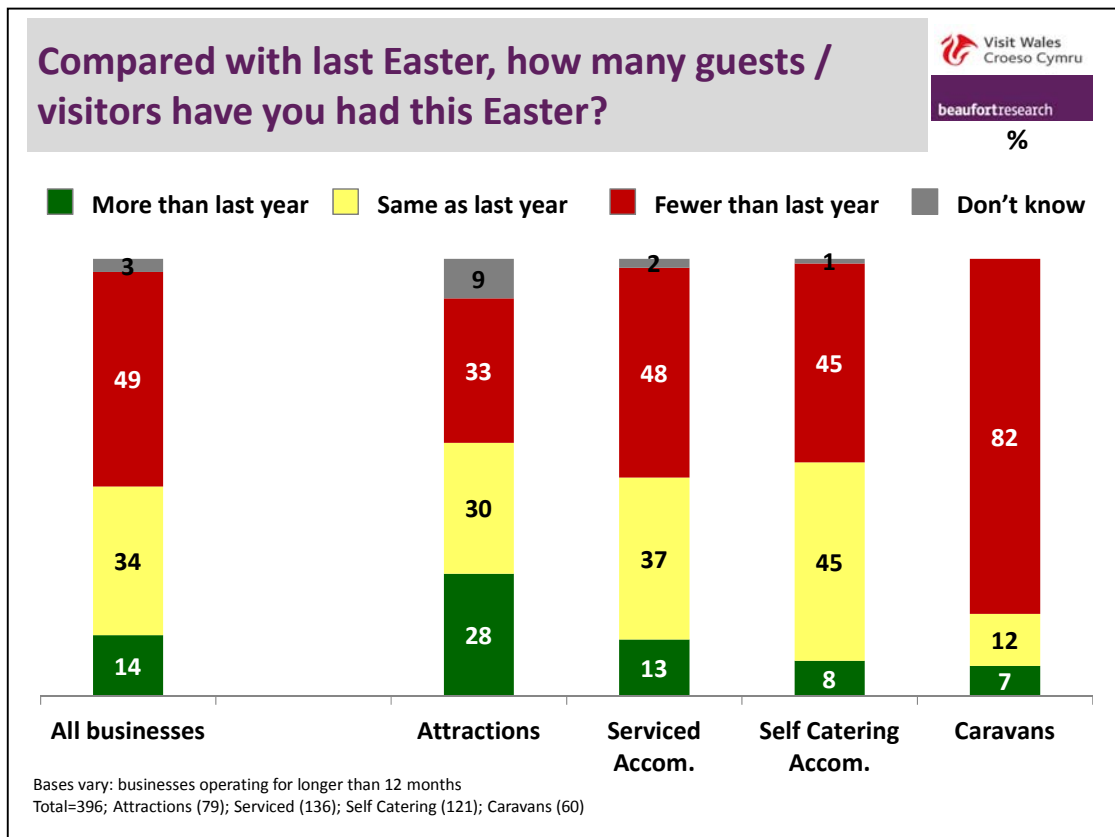
4. MAIN FINDINGS

4.1   Business Confidence

Those businesses that had been established for longer than 12 months were asked to compare the number of guests / visitors that they had received during this Easter season to those they received during Easter last year. Just over a third (34%) said they had received about the same amount, while a relatively small proportion (14%) reported that they had received more guests / visitors this Easter. However, nearly half (49%) of the businesses interviewed said that this year they had received fewer guests / visitors compared to last year.

Looking at this by business type, attractions showed the highest proportion of businesses receiving more guests (28%), while the vast majority of caravan sites reported that they had received fewer guests (82%) – see Figure 1 below.

Figure 1

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

Legend: More than last year | Same as last year | Fewer than last year | Don't know

	More than last year	Same as last year	Fewer than last year	Don't know
All businesses	14	34	49	3
Attractions	28	30	33	9
Serviced Accom.	13	37	48	2
Self Catering Accom.	8	45	45	1
Caravans	7	12	82	

Bases vary: businesses operating for longer than 12 months
Total=396; Attractions (79); Serviced (136); Self Catering (121); Caravans (60)

Looking at the comparison of customers by region, it can be seen that the highest proportion of business reporting fewer guests were situated in Mid Wales (60%), while the highest proportion reporting more guests (16%) were situated in the South East (where a high proportion of free attractions are located).

Amongst those businesses that had received more guests, many claimed that this was because of better weather (17%) and their own marketing efforts (13%). Around one in ten said that they had improved their rooms or facilities (9%) or increased their capacity (7%), while smaller proportions credited their increase in guests / visitors to an upturn in tourism (6%) and more British people staying and holidaying in the UK (4%) – see Table 2 below for more details.

Table 2

Why would you say you have had more guests / visitors (unprompted)?	% respondents
Better weather	17
Own marketing	13
Improved rooms / facilities	9
Increased capacity	7
Upturn in tourism	6
More British people staying in the UK	4
Events in the area	4
Repeat business	2
Other	52
Don't know	11

Base = businesses trading 12+ months with more visitors this Easter compared to last year (54)

Some businesses expanded on the efforts they had made to improve their business, including increasing their advertising spend and developing their online presence.

"We've joined the booking.com website"
(Serviced Accommodation, North Wales)

"We've extended our website"
(Caravans, South West Wales)

Other business mentioned how events and in their area had had a positive impact on the business.

"There was a church convention at Pontin's which affected us"
(Serviced accommodation, North Wales)

Amongst the higher proportion of businesses that said they had received fewer guests this Easter compared to last Easter, most felt that this was a direct result of the poor weather (79%), while around one in three (29%) felt that the economic climate was responsible for their receiving fewer guests – see Table 3 below for more details.

Table 3

Why would you say you have had fewer guests / visitors (unprompted)?	% respondents
Weather not as good	79
Economic climate	29
Unforeseen problems	2
Downturn in tourism in the area	2
Strong competition	1
Fewer overseas visitors	1
Didn't promote the business	1
Other	23
Don't know	3

Base = businesses trading 12+ months with fewer visitors this Easter compared to last year (195)

Several businesses felt that Easter falling earlier in the year had impacted negatively on their business.

"Whenever we have an early Easter we get less people"
(Attraction, South West Wales)

One business believed that there were too many similar businesses in their area, some of which had not received planning permission, which resulted in their receiving less trade.

"In the Vale of Glamorgan, there is an over provision in the number of holiday cottages. People convert their barns, and do not get residential planning permission and then they find it difficult to let. We have a battle between the Tourist Office and the breaking of the planning permission. We choose to holiday let because we don't want people living on the farm, we want to be in control but we only rent two out of six cottages currently, as there are so many in the area. "
(Self-catering accommodation, South East Wales)

Not surprisingly, when asked to compare their business' overall turnover for this Easter season compared to the previous year, the findings reflected those seen for number of guests / visitors. Just over a quarter said that their turnover was the same (26%), and while 17% of businesses reported that they had a higher turnover this Easter, half (50%) said that turnover for their business during Easter 2013 was lower than in 2012.

Again, attractions were more likely to report that they had higher turnover (28%), while caravan sites were much more likely to report a reduction in turnover (78%) – see Figure 2 below.

Figure 2

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

Visit Wales Croeso Cymru
beaufortresearch
%

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

	All businesses	Attractions	Serviced Accom.	Self Catering Accom.	Caravans
Don't know	7	14	8	2	2
Lower than last year	50	38	46	49	78
Same as last year	26	19	24	40	12
Higher than last year	17	29	21	9	8

Bases vary: businesses operating for longer than 12 months
Total=396; Attractions (79); Serviced (136); Self Catering (121); Caravans (60)

In terms of region, more businesses in South West Wales reported an increase in turnover compared to last year (20%), while more businesses in Mid Wales reported a decrease (55%).

Despite the general downturn in the number of guests / visitors this Easter compared to last Easter, the majority of all businesses interviewed were optimistic about the coming summer season.

Nearly three quarters (73%) said that they were confident for the summer season, with one in five (21%) saying they were very confident, and over half (52%) fairly confident. However, a sizable minority of one in five (21%) were not confident for the upcoming summer, with 17% reporting that they were not very confident, and 4% not at all confident.

Overall confidence levels were highest amongst attractions (78% confident) and those businesses located in South East Wales (88% confident) – these two figures are no doubt related, as South East Wales has a high number of attractions (especially free of charge attractions).

There was an interesting polarisation of opinion amongst caravan sites; this sector contained the highest number of businesses reporting that they were very confident about the summer season (28%), as well as the highest proportion that were not confident (26%) – see Figure 3 below.

Figure 3
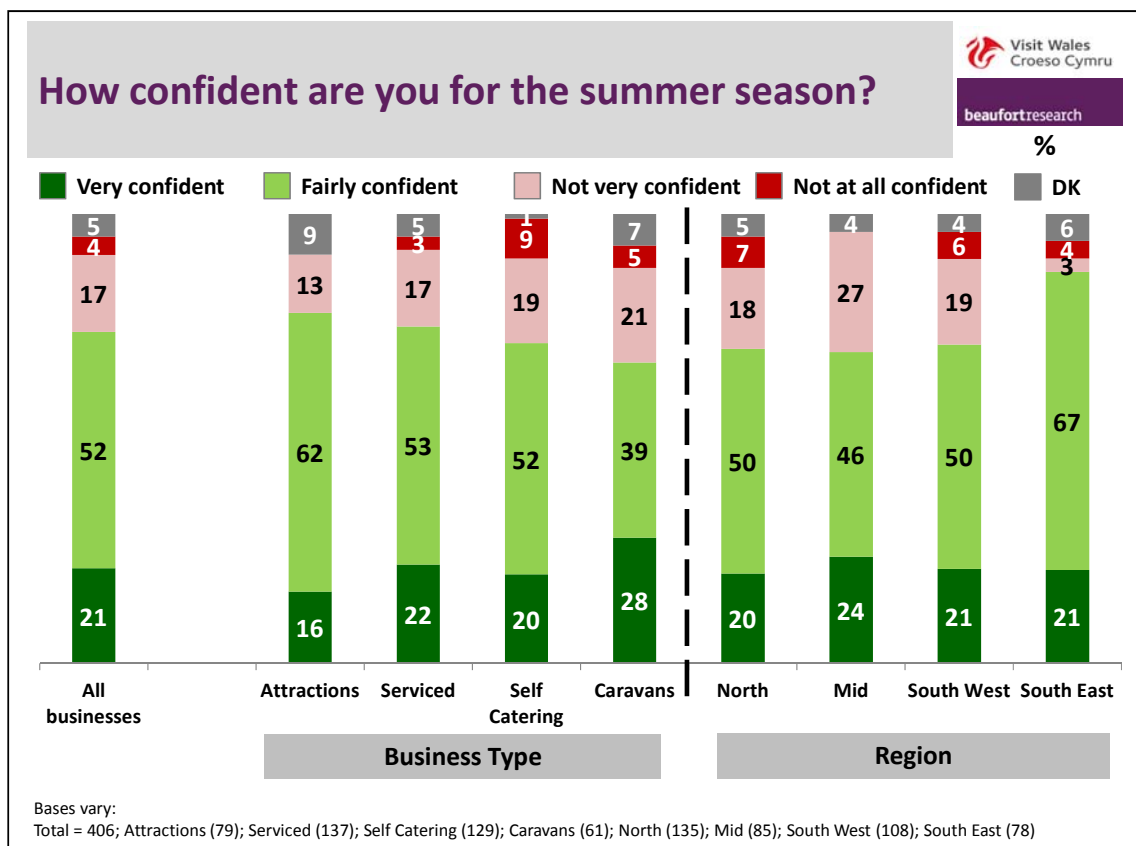
4.2   Advertising and Promotion

All businesses were asked how, if at all, they intended to promote their business during 2013.

Just over a third of businesses said that they only intended to promote their business online (34%), while a very small proportion (2%) only intended to use printed materials or business recommendations. Most of the businesses interviewed intended to use a combination of both online and offline marketing to promote their business in 2013; around one in ten (7%) did not intend to do any active promotion, instead relying upon repeat business, customer recommendations and passing trade.

Overall, 89% of businesses used online marketing, while 57% used offline sources.
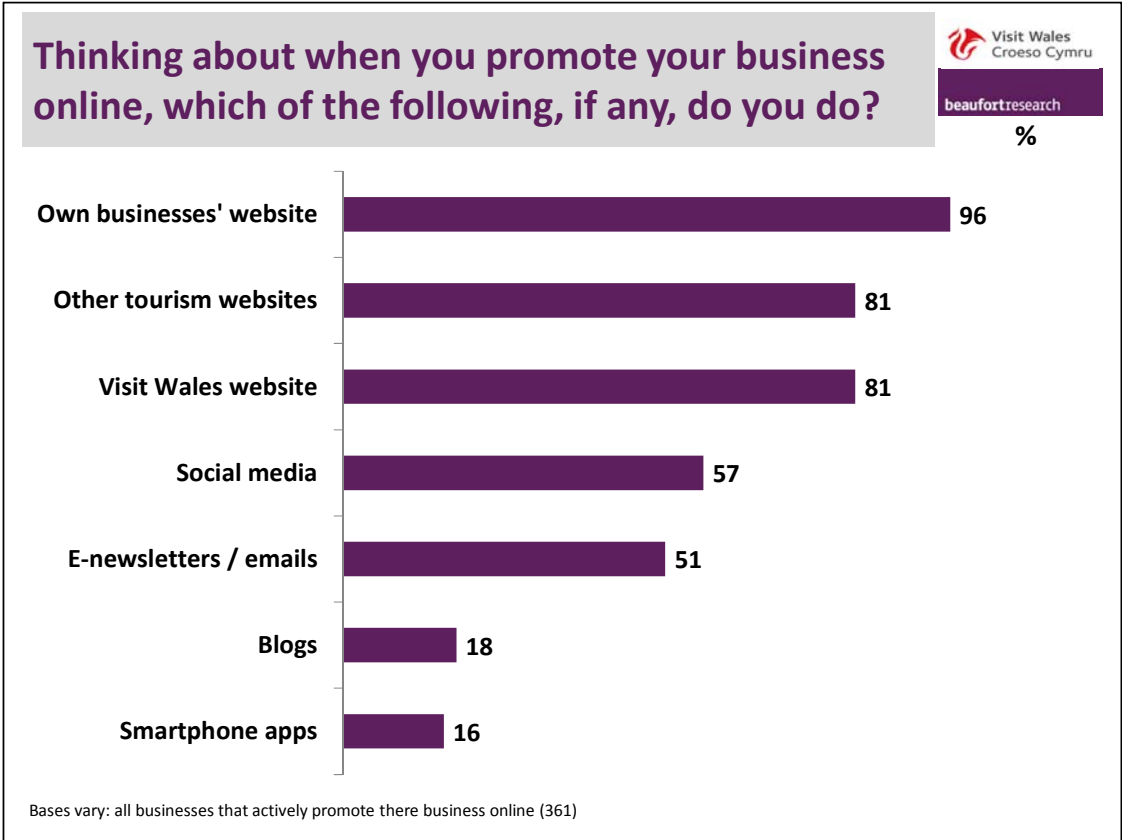
Figure 4
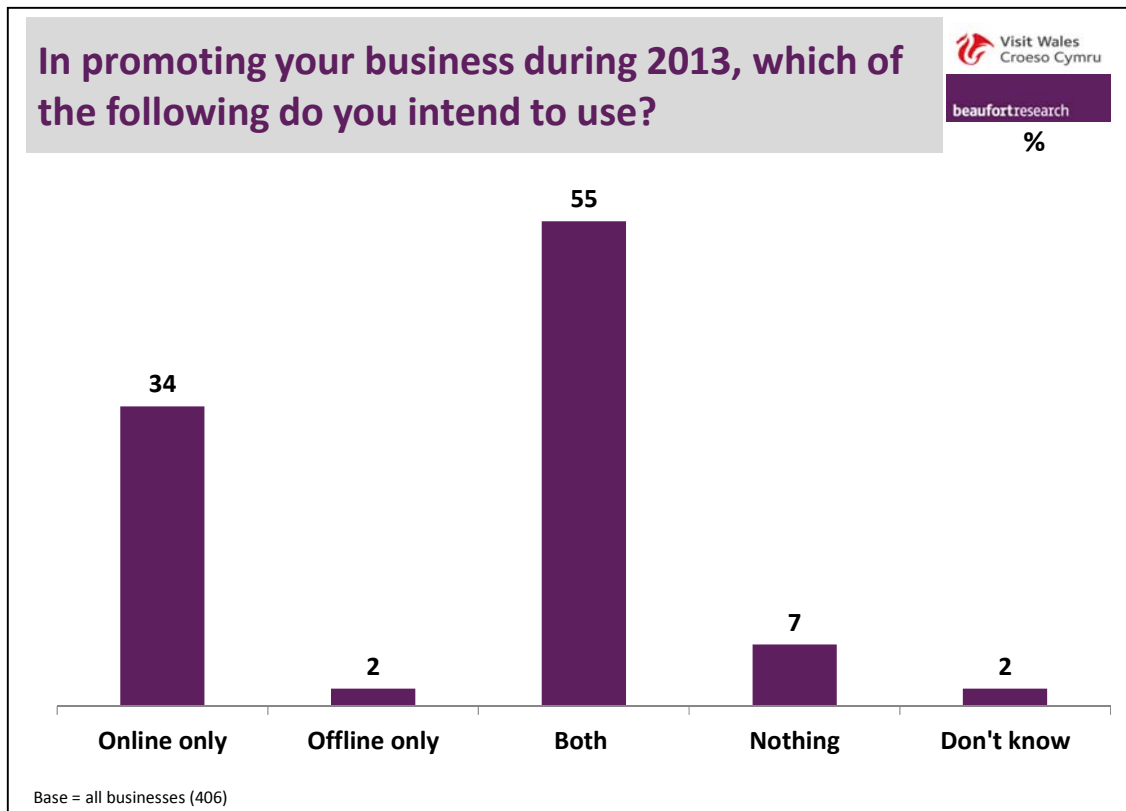
Serviced and self-catering accommodation businesses were more likely to choose to market their businesses exclusively online (42% and 41% respectively), while attractions were much more likely to use both online and offline marketing (71%). There were no significant differences in methods of marketing by region.

Those businesses intending to market their business online were asked which specific methods they use. The vast majority (96%) said that they used their own website, while eight in ten mentioned other tourism sites (such as lastminute.com or their local authority website) and the Visit Wales website (81% for each).

Just over half used social media (57%) or e-newsletter and emails (51%) to market their business online, while around one in five said they use blogs (18%) or smartphone apps (16%).

Other sources of online marketing included business directories such as yell.com and letting sites, Trip Advisor and QR codes that can be scanned using a smartphone – see Figure 5 below.

Figure 5

Thinking about when you promote your business online, which of the following, if any, do you do?

%

Own businesses' website	96
Other tourism websites	81
Visit Wales website	81
Social media	57
E-newsletters / emails	51
Blogs	18
Smartphone apps	16

Bases vary: all businesses that actively promote there business online (361)

Attractions were much more likely than accommodation businesses to say that they used social media (84%), blogs (37%) and smartphone apps (28%), and less likely to say they marketed their business using the Visit Wales website (63%).
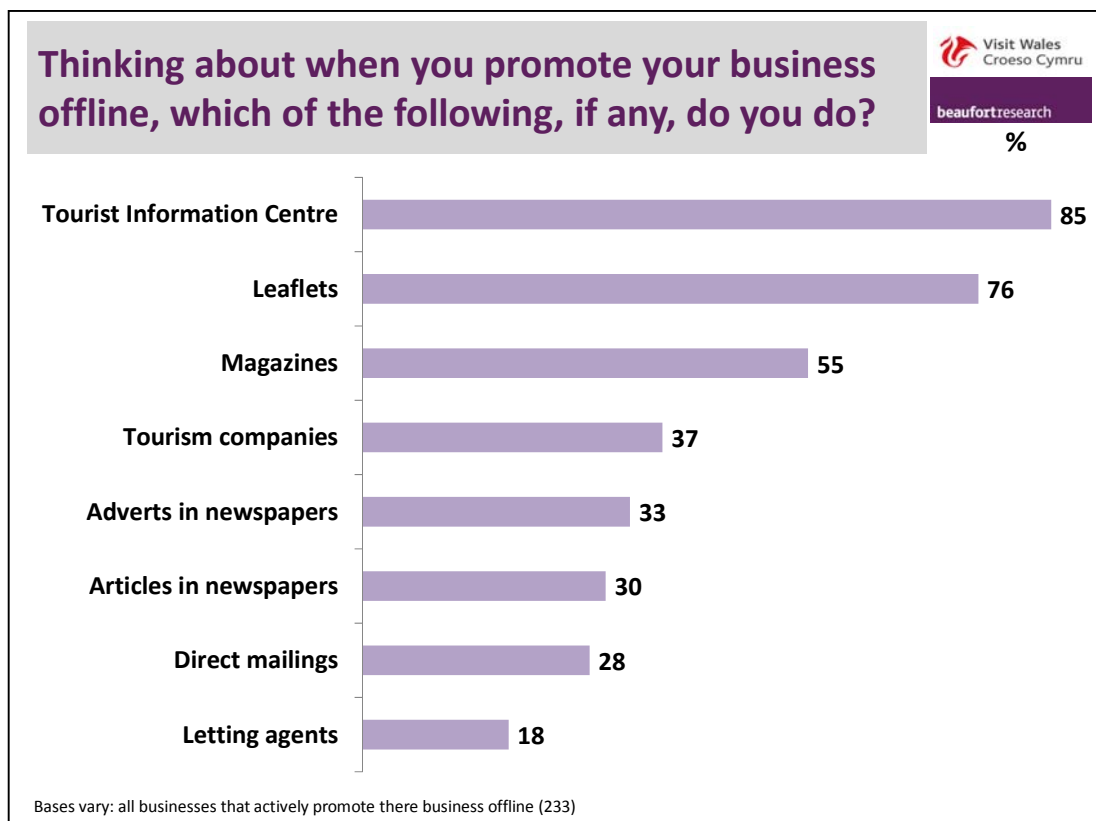
Turning to offline methods of marketing, amongst those businesses that intended to promote their business using printed materials and business recommendations, most used Tourist Information Centres (85%), while three quarters printed leaflets for their business (76%) – this rose to 98% amongst attractions. A further 28% said they used direct mailings to promote their business.

Just over half said they used magazines to promote their business (55%), while around a third used adverts (33%) and articles (30%) in newspapers. Use of printed media sources increased significantly amongst attraction businesses; 72% said they used magazines, 60% said they used adverts in newspapers and 67% articles in newspapers.

Over a third (37%) of all businesses intending to use offline marketing said they used tourism companies (rising to 46% for serviced accommodation), while 18% used letting agents (rising to 37% for self-catering accommodation).

Other offline promotion methods included local radio, brochures and posters - see Figure 6 below.

Figure 6

Thinking about when you promote your business offline, which of the following, if any, do you do?

	%
Tourist Information Centre	85
Leaflets	76
Magazines	55
Tourism companies	37
Adverts in newspapers	33
Articles in newspapers	30
Direct mailings	28
Letting agents	18

Bases vary: all businesses that actively promote there business offline (233)

When asked to consider which method they felt would win the most business, online sources were felt to be more effective than offline. While this may relate in part to the fact that more businesses use online (89%) than offline (57%) methods to promote their business, there is still a clear majority that consider online marketing to be more effective versus offline (74% compared to 24%).

The business' own website was mentioned by nearly four in ten of those that actively market their business online (39%), while other tourism sites were mentioned by nearly three in ten (28%). The most effective offline marketing method was felt to be leaflets; 10% of those that use printed materials and business recommendations thought that this marketing method brought in the most business (this rose to 32% amongst attractions) – see Figure 7 below for more details.

Figure 7

Which one in particular do you expect will win you the most businesses?

%

Own business' website	39
Other tourism websites	28
Leaflets	10
Social media sites	4
Tourist Information Centre	4
Letting agents	4
Visit Wales website	2
Tourism companies	3
Magazines	2
E-newsletters / emails	1
Adverts in newspapers	1
Direct mailiings	1
Other	4
Don't know	8

Online marketing = 74%

Offline marketing = 24%

Bases vary: all businesses that actively promote there business offline and / or offline (371)

Most businesses actively monitored how their guests / visitors heard about them (81%) – 45% said that they did this all the time, while 36% did it sometimes. However, a sizable minority of nearly one in five (18%) reported that they did not monitor how their guests / visitors heard about them.

Serviced accommodation businesses were the most active in monitoring this (58% all of the time), while attractions were the least active (20% all of the time). Moreover, attractions were most likely to report that they did not actively monitor how their visitors heard about them (32%). There were no significant regional differences observed – see Figure 8 below.

Figure 8
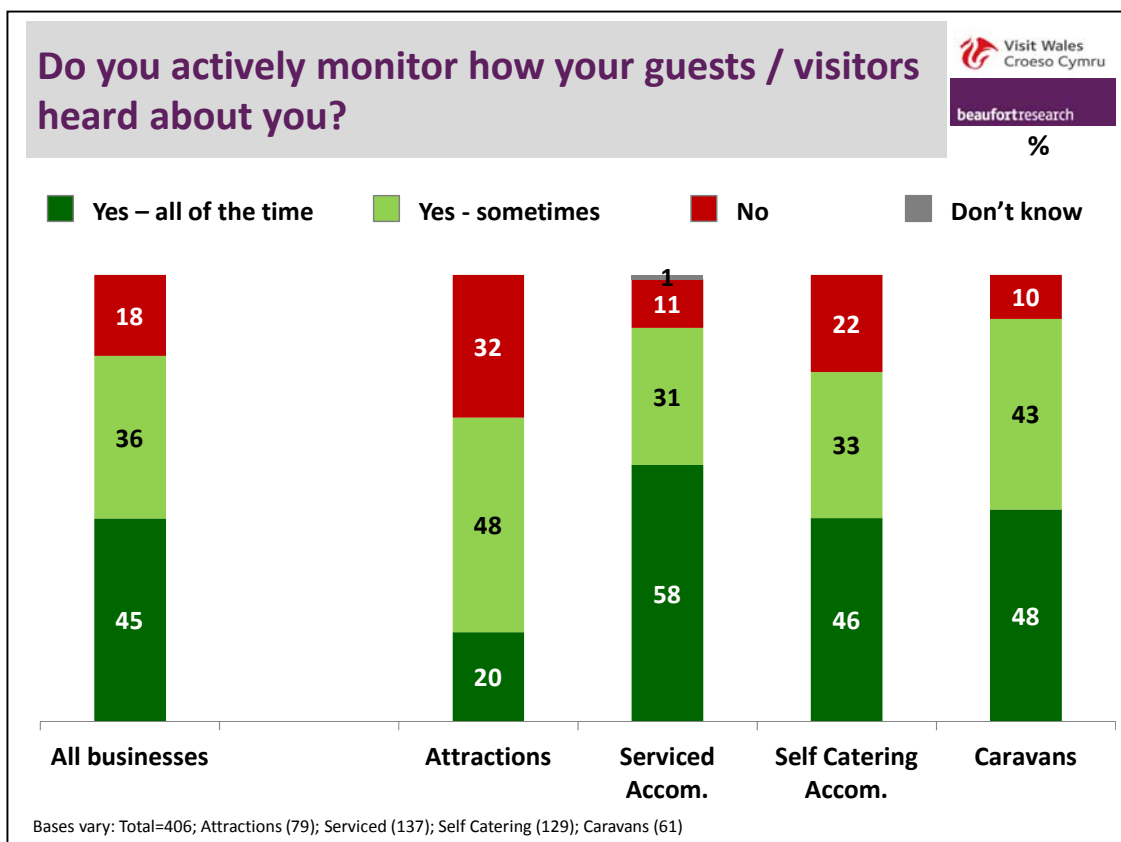
The main method used to monitor how guests / visitors heard about the business was simply to ask them. Other methods included booking forms, website analytics, customer satisfaction surveys and feedback forms.

4.3   Online versus Printed Material in Marketing

When it came to directly comparing the effectiveness of online promotion versus printed marketing materials, there were clear differences in opinion between attractions and accommodation businesses.
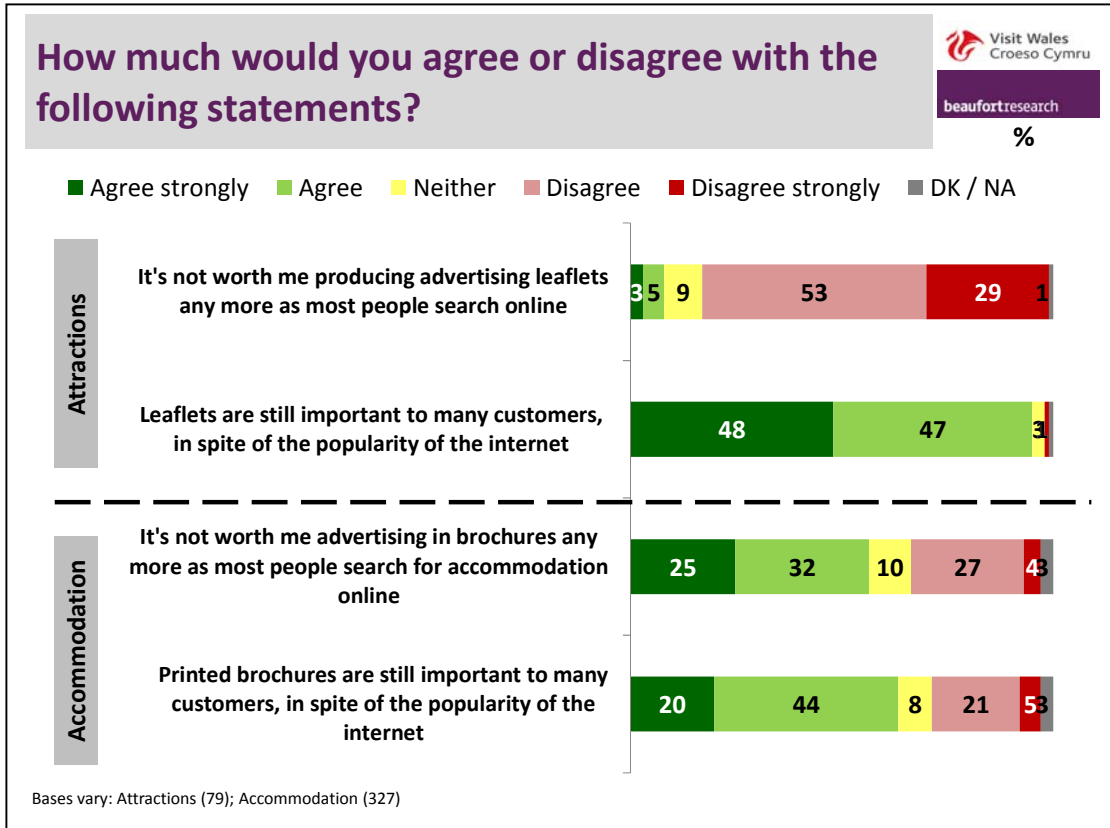
Attractions were much more positive about the role of printed material in promoting their businesses; the vast majority (95%) <u>agreed</u> that *"Leaflets are still important to many customers, in spite of the popularity of the internet"*, with 48% agreeing strongly with this, and 47% simply agreeing. Only 1% of businesses disagreed with this statement.

A total of 82% of attractions <u>disagreed</u> with the statement *"It's not worth me producing leaflets anymore as most people search online"*. Nearly three in ten (29%) disagreed strongly with this statement, with over half (53%) simply disagreeing. Around one in ten agreed or strongly agreed with this (8%), while a similar proportion (9%) neither agreed nor disagreed.

Opinion was more polarised amongst accommodation businesses, especially regarding whether or not it was worth them advertising in brochures. Just over half (57%) agreed that *"It's not worth me producing leaflets anymore as most people search online"*, however nearly a third of accommodation businesses disagreed with this (31%).

A slight majority of 64% <u>agreed</u> that *"Printed brochures are still important to many customers, in spite of the popularity of the internet"*, although only 20% agreed strongly (44% simply agreed). However, a sizable minority of 26% disagreed with this; 5% disagreed strongly and 21% simply disagreed – see Figure 9 overleaf.

Figure 9

How much would you agree or disagree with the following statements?

%

■ Agree strongly ■ Agree □ Neither ■ Disagree ■ Disagree strongly ■ DK / NA

Attractions

It's not worth me producing advertising leaflets any more as most people search online — 3 5 9 53 29 1

Leaflets are still important to many customers, in spite of the popularity of the internet — 48 47 3

Accommodation

It's not worth me advertising in brochures any more as most people search for accommodation online — 25 32 10 27 4 3

Printed brochures are still important to many customers, in spite of the popularity of the internet — 20 44 8 21 5 3

Bases vary: Attractions (79); Accommodation (327)

There were several verbatim comments received about the relative merits of printed leaflets and brochures compared to the internet.

Many accommodation providers felt that the printed brochure was 'dying out', and that these would no longer be produced in the coming years.

"Brochures are dying. It's only a matter of time before it's only the internet"
(Serviced accommodation, North Wales)

Others felt that most things are done online these days, therefore it made sense to promote their accommodation business online.

"The internet is the way people are going. If we had to do brochures and things like that it'd be too time consuming and costly what with printing and posting them all out and finding people who were actually willing to receive them. When people use the internet they can get any information they want straight away without going through lots of irrelevant things."
(Self-catering accommodation, South West Wales)

Others recognised that printed brochures still had a place in their marketing portfolio, and that they were perhaps more important to older guests compared to younger ones.

"Both have their place… it depends who the audience is. If it's older people then perhaps they're not computer literate in which case obviously they need brochures."
(Self-catering accommodation, Mid Wales)

Comments received from attractions were, as might be expected, much more positive about printed leaflets. Again, several acknowledged that these were more valued by older visitors compared to younger ones.

"A lot of those people who come to this sort of place, they don't have internet access. It's older people."
(Attraction, North Wales)

Other attractions felt that leaflets, being easily portable and able to show maps of how to get there, were still important to their business.

"For us the leaflets work very well as people pick them up and can have all information in one, they also have maps on it. Unless they have smartphone apps they cannot access these."
(Attraction, South East Wales)

However, for some attractions, the cost of producing and posting leaflets had become too prohibitive in the face of the reduction in costs associated with online marketing.

"I think it's purely because of the cost, environmental and economic we now tend to just create leaflets for targeted events e.g. we've now phased out our postal mail out."
(Attraction, North Wales)

4.4   Customer Review Sites

Businesses were asked how useful they found customer review sites such as Trip Advisor. On the whole, opinion was divided on the usefulness of these sites; while nearly half (48%) of all businesses thought they were useful (21% very useful; 27% fairly useful), around a third (31%) did not think they were particularly useful for their business (9% not very useful; 22% not at all useful). A sizeable proportion, however, did not know (21%).

There were differences according to business type – serviced accommodation businesses were most likely to consider these sites to be useful (31% saying very useful), while self-catering accommodation were least likely (12% very useful). However, this sector contained the highest proportion of businesses that could not comment on the usefulness of these sites (33%).

Regional differences were less pronounced, although those businesses in South Wales tended to be more positive about review sites than those in Mid Wales and North Wales – see Figure 10 below for more details.

Figure 10
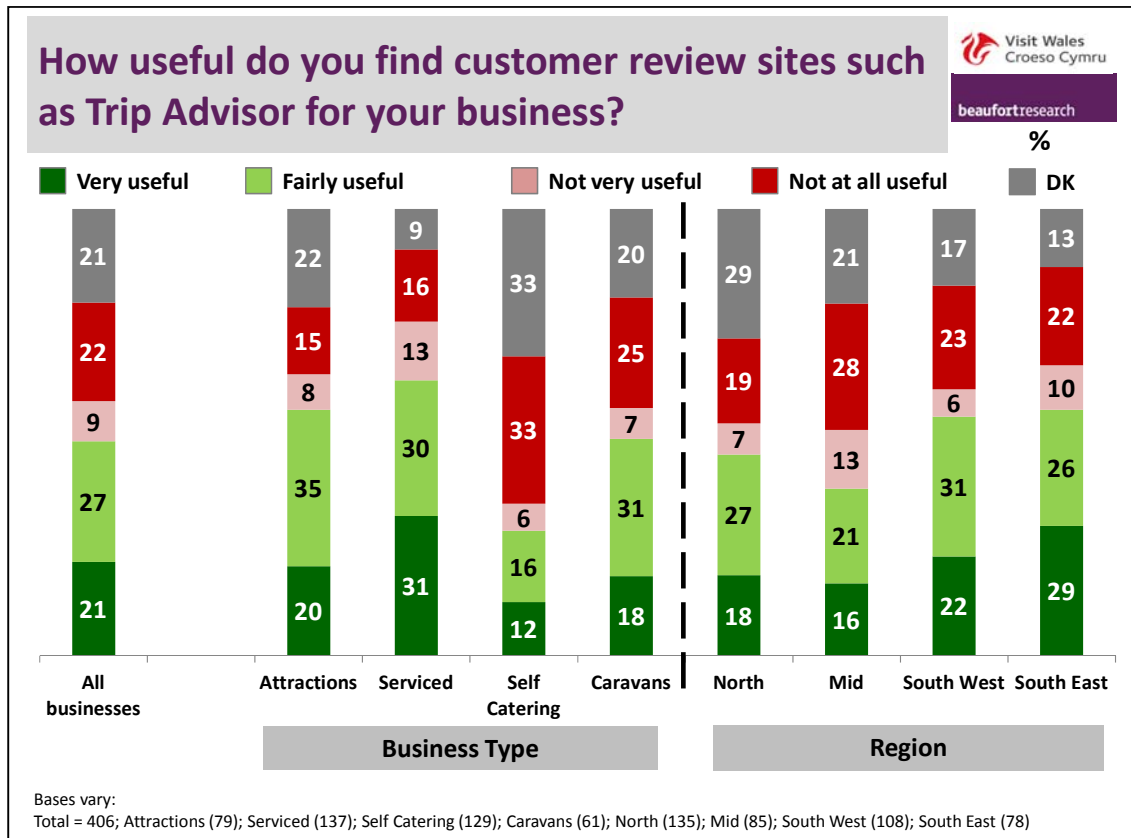
APPENDIX
Survey Questionnaire

VISIT WALES BUSINESS SURVEY 2013 – WAVE 1
FINAL QUESTIONNAIRE (2^(ND) April 2013)

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

Can I just check, are you the owner of the business or in a managerial role at the business?
IF NO ask to speak to person in a managerial role/ owner.

S1   Can I just check – do you speak Welsh?
                Yes – fluently ➔ S2
                Yes – not fluently ➔ S2
                No – does not speak Welsh ➔ Q1

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

CORE SECTION (Section 1)

ASK ALL

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

        Yes (Go to Q2)   *No* (Go to 6)

Q2   Compared with last Easter, how many guests/visitors have you had this Easter? Would you say you have had…READ OUT

        More than last year – go to Q3
        Same as last year – go to Q5
        Fewer than last year – go to Q4
        Don't know – go to Q5

Q3 **(IF MORE) Why would you say you have had more guests/visitors? (DO NOT PROMPT)**
MAY MULTICODE

More British people staying in the UK

Better weather

Own marketing

Repeat business

Upturn in tourism

Recommendations

Increased capacity

Events in the area

Improved rooms/facilities

More overseas visitors

Don't know

Other (specify)

Q4 **(IF FEWER) Why would you say you have had fewer guests/visitors? (DO NOT PROMPT)**
MAY MULTICODE

Economic climate

Weather not as good

Unforeseen problems

Strong competition

Downturn in tourism in the area

Business winding down

Fewer overseas visitors

Didn't promote the business

Don't know

Other (specify)

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

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

ADVERTISING (Section 2)

ASK ALL

Q6   **In promoting your business during 2013 which of the following do you intend to use? READ OUT. SINGLE CODE**

On-line promotion i.e. on the internet – **GO TO Q7a**
Printed material and business recommendations– **GO TO Q7b**
Both – **GO TO Q7c**
Nothing – I rely on word of mouth recommendations from previous guests
Nothing – I rely on repeat business
Nothing – I rely on passing trade

Q7a   **(IF PROMOTE BUSINESS ON-LINE AT Q6) And thinking about when you promote your business online, which of the following, if any, do you do? READ OUT. MULTI CODE**

Your own business' website
Visit Wales website (www.visitwales.com)
Other tourism websites (e.g. lastminute.com, Local Authority website)
Smartphone apps (e.g. IPhone, Android)
E-newsletters / emails
Blogs
Social media sites (Twitter, Facebook)
Other (specify)

Q7b   **(IF PROMOTE BUSINESS OFF-LINE AT Q6) And thinking about when you promote your business using printed material and business recommendations, which of the following, if any, do you do? READ OUT. MULTI CODE**

Leaflets
Magazines
Adverts in newspapers
Articles in newspapers
Direct mailings
Tourist Information Centre
Letting agents
Tourism companies
Other (specify)

Q7c **(IF PROMOTE BUSINESS USING BOTH AT Q6) And thinking about when you promote your business, either online, or using printed material and business recommendations, which of the following, if any do you do?**
READ OUT. MULTI CODE

Your own business' website
Visit Wales website (www.visitwales.com)
Other tourism websites (e.g. lastminute.com, Local Authority website)
Smartphone apps (e.g. IPhone, Android)
E-newsletters / emails
Blogs
Social media sites (Twitter, Facebook)
Leaflets
Magazines
Adverts in newspapers
Articles in newspapers
Direct mailings
Tourist Information Centre
Letting agents
Tourism companies
Other (specify)

LIST TAKEN FROM ANSWERS TO Q7a, Q7b and Q7c

Q7d **Which one in particular do you expect will win you the most business?**
DO NOT PROMPT. SINGLE CODE

Your own business' website
Visit Wales website (www.visitwales.com)
Other tourism websites (e.g. lastminute.com, Local Authority website)
Smartphone apps (e.g. IPhone, Android)
E-newsletters / emails
Blogs
Social media sites (Twitter, Facebook)
Leaflets
Magazines
Adverts in newspapers
Articles in newspapers
Direct mailings
Tourist Information Centre
Letting agents
Tourism companies

Other (specify)
Don't know

Q8　**Do you actively monitor how your guests/visitors heard about you?**
READ OUT

　　　Yes – all the time – Q8
　　　Yes – sometimes – Q8
　　　No – Q9
　　　Don't know – Q9

Q9　**How do you monitor this?**

_____

_____

Q10　**How useful do you find customer review sites such as Trip Advisor for your business?**
READ OUT

Very useful
Fairly useful
Not very useful
Not at all useful
DK

ACCOMMODATION ONLY – ATTRACTIONS SKIP TO Q13

Q11 **How much would you say you agree or disagree with each of the following statements? READ OUT Would you say you…**

Agree strongly
Agree
Neither agree nor disagree
Disagree
Disagree strongly

Not applicable to my business

READ OUT. ROTATE ORDER.

    A. It is not worth me advertising in brochures any more as most people search for accommodation online
    B. Printed brochures are still important to many customers, in spite of the popularity of the internet

Q12 **Do you have any further comments you would like to make about the role of printed brochures versus the role of the internet?**

ATTRACTIONS ONLY – ACCOMMODATION SKIP TO Q15

Q13 **How much would you say you agree or disagree with each of the following statements? READ OUT Would you say you…**

Agree strongly
Agree
Neither agree nor disagree
Disagree
Disagree strongly

Not applicable to my business

READ OUT. ROTATE ORDER.

    A. It is not worth me producing advertising leaflets any more as most people search online
    B. Leaflets are still important to many customers, in spite of the popularity of the internet

Q14 **Do you have any further comments you would like to make about the role of printed leaflets or brochures versus the role of the internet?**

Q15   **Which of the following best describes your location:**

Seaside   *Inland*   *Urban*

Q16   **How confident are you for the summer season?**

Very confident

Fairly confident

Not very confident

Not at all confident

Don't know

Q17   **To help us with the analysis, can I ask, is your business graded or accredited by Visit Wales?**

Yes

No

Don't know

MRS REASSURANCE - THANK AND CLOSE