

Dadansoddi ar gyfer Polisi



Analysis for Policy



Llywodraeth Cymru
Welsh Government

SOCIAL RESEARCH NUMBER:

28/2017

PUBLICATION DATE:

JUNE 15, 2017

Wales Tourism Business Barometer

Wave 1, Easter 2017

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Wales Tourism Business Barometer: Wave 1, Easter 2017

Anthony Lydall and Laura Nesbitt, Strategic Research and Insight



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

For further information please contact:

Dr. Robert Lewis, Head of Tourism Research, robert.lewis@wales.gsi.gov.uk

Department for Science, Economy and Transport

QED Centre

Treforest Estate

Pontypridd

Rhondda Cynon Taf

CF37 5YR

Tel: 0300 061 6026



All content is available under the [Open Government Licence v3.0](#), except where otherwise stated.

Contents

1. HEADLINE FINDINGS	2
2. QUALITATIVE FINDINGS	4
3. BACKGROUND AND METHODOLOGY	7
4. YEAR-TO-DATE PERFORMANCE	9
5. REASONS FOR INCREASED VISITOR LEVELS	12
6. REASONS FOR DECREASED VISITOR LEVELS	14
7. PROFITABILITY	15
8. PERFORMANCE OF MARKETS.....	17
9. EXPECTATIONS AND CONFIDENCE FOR THE SUMMER.....	19
10. BREXIT AND EU WORKERS IN WALES	24

1. HEADLINE FINDINGS

Late Easter and good weather deliver fine results

- 1.1 The combination of fine weather and a later Easter has seen a lift in visitor numbers for 37% of businesses. Attractions and activity operators have performed particularly well, with 57% welcoming more visitors than Easter last year.
- 1.2 Weather-dependent caravan and campsite operators have also fared well, with nearly half (46%) seeing a boost in the number of visitors compared to the same period in 2016.

Taking more money

- 1.3 Most sectors have taken more profits so far in 2017, compared with the same period last year. Overall, a third (34%) of businesses have reported seeing higher profits, with higher proportions in the well-performing attractions and activity sector (50%) and caravan and campsites (47%).

High hopes for the summer season

- 1.4 With a sound Easter as a good foundation for the year, the summer looks to be bright for around two in five (42%) businesses, who expect to see more visitors during the peak season, compared to last summer.
- 1.5 With hopes of fine, dry weather - and bolstered by a blooming Easter - attractions and activity operators (62%) and caravan and campsites (57%) predict taking in more visitors than last year.

Confident tourism industry

- 1.6 Most (85%) respondents are confident about how their business will perform over the summer. This has been helped by an increase in advance bookings, as visitors secure a spot for their short breaks and holidays.

Little Brexit impact to date

- 1.7 Overall, around 4% of the workforce in Wales' tourism industry are from the EU (non-UK), with hotels (9% of the workforce) and restaurants, pubs and cafes (5%) having more EU workers. The impact of Brexit on the EU workforce so far is minimal, with the majority (81%) saying it has stayed the same.
- 1.8 But some industry leaders think this may change in the future, with fewer EU workers available to the tourism industry.

- 1.9 There is some uncertainty over how Brexit may impact future bookings, with 31% saying they don't know what impact it will have. A further 37% say they expect no impact on future bookings. And 18% believe it will have a slightly positive effect on the number of bookings they receive in the future.
- 1.10 The overview from industry leaders reveals a lot of uncertainty about how Brexit will affect Wales' tourism in the medium and long term. For most, it will be a case of seeing what happens, and reacting to any changes if and when they appear.

2. QUALITATIVE FINDINGS

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

Good start to the year

- 2.3 The late Easter this year brought with it a lift in visitors for many in the industry, as visitors spent the holidays in Wales. Some industry leaders say that the welcomed increase has encouraged a lift in confidence for the rest of the year.

“The performance this Easter has been quite good - probably the same or better than last year. We’re quite confident going into the summer.”

“The Easter period seems to have been busy. Those on the ground seem to be happy with how things have gone.”

“Visitor numbers are good, they’re up on last year. We have a reporting system which shows our visitor numbers for each week of the year and it’s looking good. We are quite confident looking towards the summer.”

“There have been a lot of people about around Easter.”

“I think most people are quite confident looking towards the summer.”

Worries over valued EU workers

- 2.4 Some industry leaders are concerned about how the Brexit vote may affect EU workers, who are relied upon within some tourism sectors. Those who hire EU workers say that they are hard workers and are more committed to a career in the tourism industry. Should Government negotiations make it harder for people from the EU working in Wales, this could have a negative impact on the industry in Wales.

“If there are problems getting EU workers then that could be really bad for restaurants and hotels.”

“When locals tend to start a job in this industry, they pack it in after four or five days, whereas those from the EU work harder. The more educated locals have ambition and don’t want to work or stay in the tourist or hospitality industry for long, they want to get a better job or go to university.”

“Europeans have a much better regard for the industry and understand that it has value. Whereas in the UK, we don’t look favourably on the industry, especially those in the middle to upper class.”

“I would be quite reluctant to come here if I was a worker from Europe. I’d probably prefer to go somewhere else to set up home. I’d go somewhere where there isn’t an issue of not being from the area, somewhere where you wouldn’t be

asked to leave in the future. Attracting talent in the future will be difficult. I think the better talent is now going to other parts of Europe.”

“Everyone is a little bit nervous about the situation with EU workers. These workers are very much part of our community. This could become a bigger problem if we’re seen as unwelcoming to workers from overseas. But again, we don’t know fully what the implications will be so everyone is keeping an eye on it and waiting to see what happens.”

Further uncertainty over Brexit impact

2.5 Along with concerns over how Brexit negotiations will affect EU workers, how Governmental decisions will impact individual businesses and the wider tourism industry are yet unknown. This is causing a somewhat unsettled feeling among some. And for most, it is a case of ‘wait and see’ what the medium and long-term impacts will be.

“Now Article 50 has been acted upon, I think people are just waiting and watching. We’re not going to know how Brexit will affect tourism, but things will become clearer. We won’t know anything solid for a couple of years.”

“There’s a lot of uncertainty at the moment.”

2.6 Some have noticed increased prices post-Brexit, which is having an impact on the cost of running a business.

“Brexit has caused a lot of uncertainty. Prices have increased also, goods such as oil have sky rocketed. It’s quite scary and there’s a lot of uncertainty out there.”

“We have seen inflation as a result of the drop in the value of Sterling. Buying goods etc is more expensive.”

Remaining upbeat about future impact

2.7 While the impacts of Brexit remain unclear, some industry leaders feel like Wales is well placed to deal with any effects. For now, the weaker pound has made the UK better value for money for European visitors and has prompted an increase in staycations.

“Although some are unsure because of Brexit, the fact that Britain is cheaper and that those in tourism are generally welcoming means everyone thinks we have a good chance of drawing more people in the future. Those from outside the UK will get more bang for their buck.”

“As Britain is cheaper I think more people from the UK will choose to holiday here.”

“Europeans are getting better deals at the moment because of the pound – this has helped. It’s far too early to tell what the implications of Brexit will be.”

“The low pound has definitely made a difference for Europeans coming here and also for staycations.”

Top attractions acting as a draw

2.8 Visitors are being enticed by the promise of top attractions and world-class establishments in Wales. This has been bolstered by The Year of Adventure, which helped put some parts of the country firmly on the map and is expected to have a positive, long-term effect.

“There are ‘thrill’ activities, like Zip World, which definitely have an effect on the local area and a bit further afield too.”

“The Year of Adventure has been good for us, it’s fitted with what we provide. It wasn’t seen as a one-off; it was seen as a kind of catalyst or catapult for years to come.”

“More and more people are thinking out of the box when it comes to the normal adventure tourism industries. Businesses are springing up with things different to the conventional activity tourism. Zip World is an example of that, and has regenerated a region, as has Surf Snowdonia. They are drawing people in, and different people too – people that wouldn’t normally come to Wales. These people then do other things while in the area.”

UEFA Champions League boost

2.9 Football fans are due to descend upon Cardiff this summer for the UEFA Champions League finals. With around 300,000 people expected to visit the capital, many tourism operators – particularly in the south of the country – look forward to the positive boost to businesses in the region.

“As soon as the dates for the Champions League were announced the hotels in the area filled up straight away. There’s always a spill over from events in Cardiff to here, so we’re confident. It’s not just the hotels that will benefit, but all the others businesses too, especially restaurants and pubs.”

“Obviously the Champions League Final will be good for the area and the region.”

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 Easter 2017, with measurements also of expectations for the rest of the year.

How is the Survey conducted?

- 3.3 This Survey has been made available for online completion as an alternative to telephone, which prior to 2016 was the only method used.
- 3.4 We have conducted 802 interviews by telephone, and the online survey distributed by area and sector partners has yielded an additional 80 responses. The overall sample of 882 makes results of questions asked to everyone accurate to $\pm 3.3\%$.
- 3.5 The sample of 882 responses is reflective of the tourism industry in Wales and is shown below by sector and region:

Sector / Region	North	Mid	South West	South East	Total
Serviced accom	88	47	81	68	284
Self catering	92	51	104	44	291
Caravan / campsites	36	13	29	6	84
Hostels	11	10	5	5	31
Attractions	28	12	21	27	88
Restaurants / pubs / cafes	6	18	13	10	47
Activity operators	21	15	9	12	57
Total	282	166	262	172	882

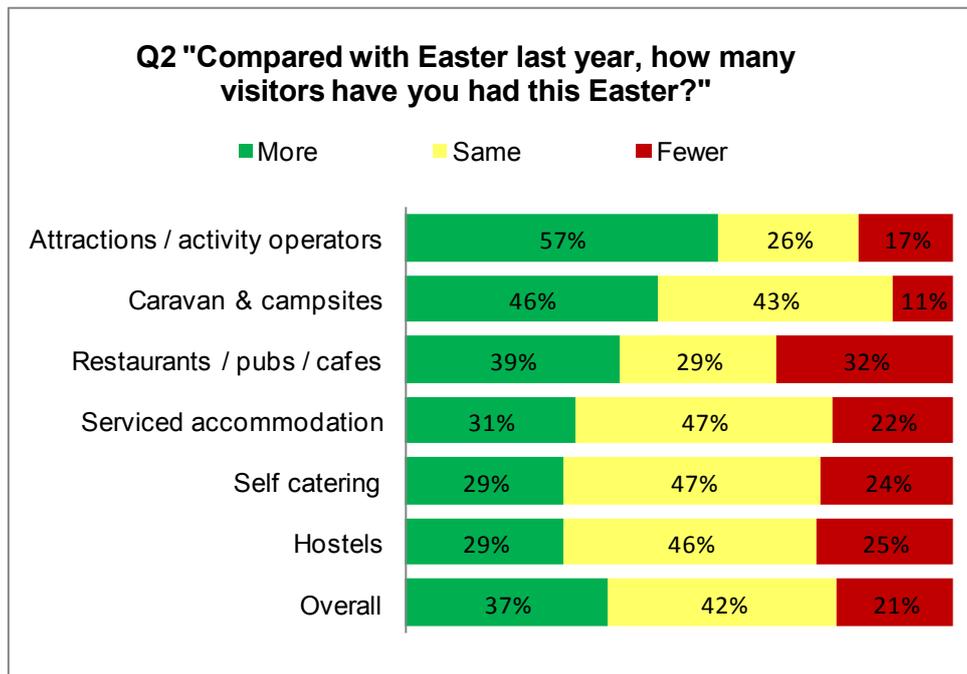
- 3.6 59% of the businesses in the sample are currently graded by Visit Wales and 41% are not. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes and activity operators, where grading is not applicable. Operators of restaurants, pubs and cafes have been selected in areas of high tourism footfall across different parts of Wales and have

been asked to answer questions in the context of their tourist (i.e. non-local) customers.

- 3.7 All telephone interviews have been conducted with business owners or managers in April. A copy of the questionnaire used is included as an appendix.

4. YEAR-TO-DATE PERFORMANCE

PERFORMANCE BY SECTOR



Fair weather and a late Easter give businesses a boost

4.1 Wales enjoyed bursts of bright weather over the Easter holidays, which fell later than previous years. These two factors combined to bring a lift in visitors for some business in Wales. Overall, 37% have welcomed more visitors this year compared to Easter in 2016.

4.2 In particular, attractions and activity operators have seen a boost in 2017, with 57% reporting to have received more visitors.

"People check weather apps before travelling and loads came on Easter Saturday as it was very good weather."
Attraction

"Better weather and Easter falling later really helped."
Attraction

"We had a 20% increase in visitors over the four-day Easter weekend this year compared to the previous year."
Attraction

More campers pitching up in 2017

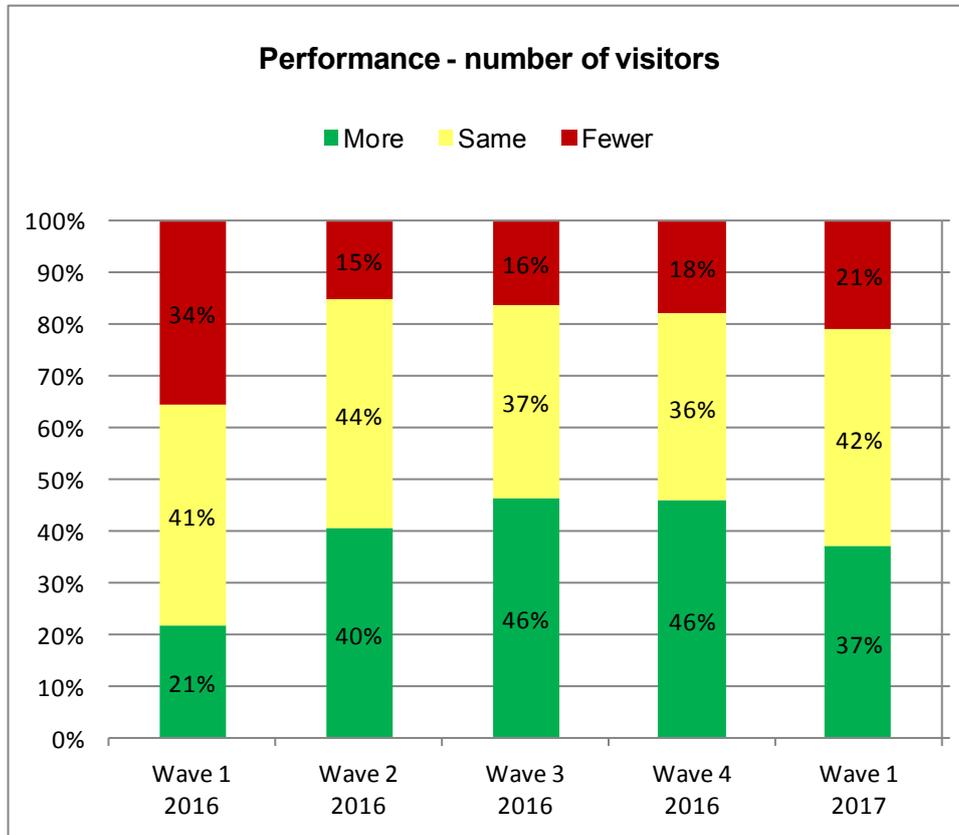
4.3 Close to half (46%) of caravan and campsite operators report more people setting up a bed on their site compared with 2016. Around half (49%) of those who have seen an increase say that the better weather encouraged campers to pitch up, and 16% cite the late Easter as a reason for more visitors.

"Easter fell later and the whole area was just very busy."

Caravan / campsite

“Good weather and Easter falling later helped bring more business.”
Caravan / campsite

PERFORMANCE TREND

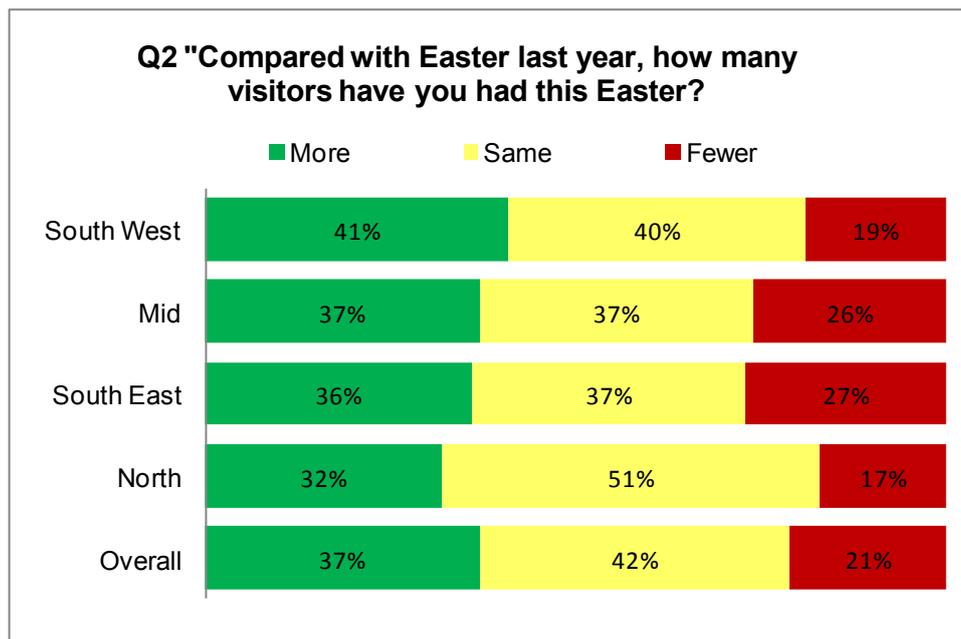


Wales' tourism sector shows continued improvement

4.4 The tracking of business performance in each wave shows how the industry is improving overall. From Easter last year (Wave 1 2016), the proportions of businesses reporting increases have risen.

4.5 At this point of the year, 37% have seen more visitors than last Easter, when 21% had seen an increase on the same period in 2015.

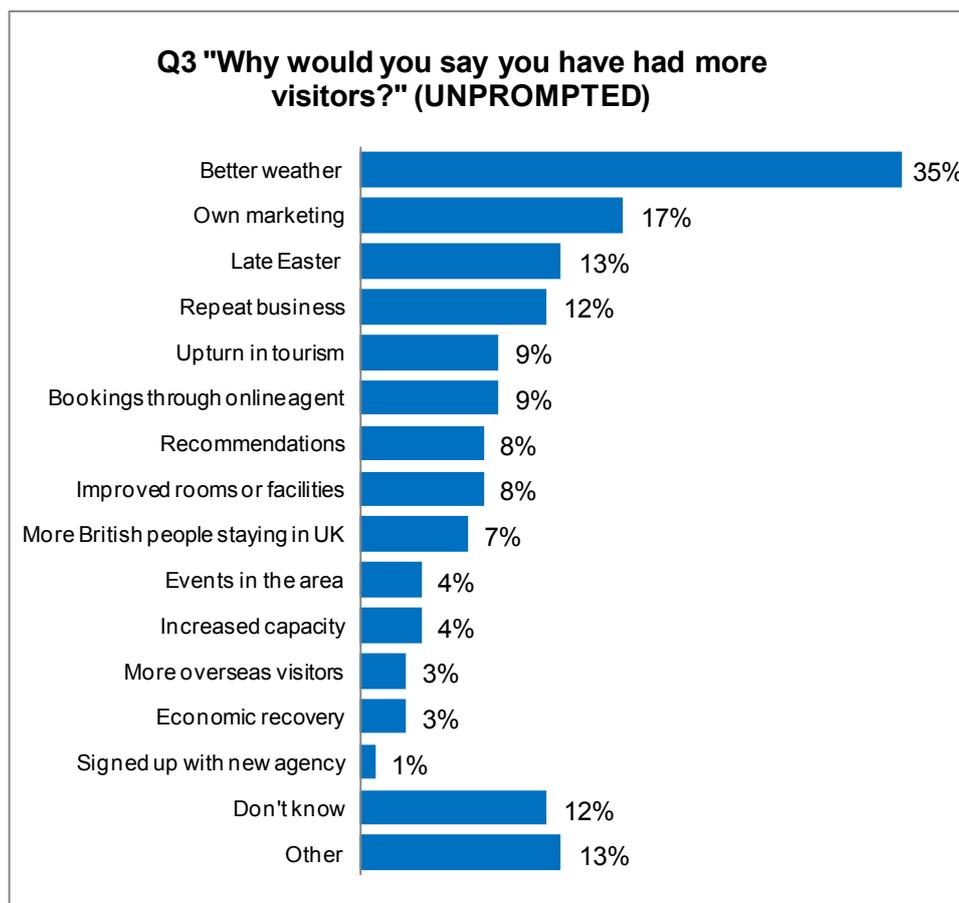
PERFORMANCE BY REGION



Tourism improves across the country

- 4.7 All four regions of Wales report improved visitor numbers this Easter compared to last year. The South West has seen the greatest improvements, with 41% reporting an increase on 2016's Easter period.
- 4.8 The other regions have seen a lift for around a third of businesses (Mid Wales 37%; South East Wales 36%; North Wales 32%).

5. REASONS FOR INCREASED VISITOR LEVELS



Better weather delivers more visitors

- 5.1 Around a third (35%) of respondents who have received more visitors this year say that better weather has contributed to the increase, as people looked to get away for the warmer Easter holidays.

"It was very busy with dry sunny weather!"

Self catering

"Better weather meant more people staying in the local area."

Restaurant

- 5.2 A higher proportion of weather-dependent businesses report have benefited from improved weather. Around half of caravan / campsites (49%) and attractions and activities (52%) have seen more visitors this Easter, compared to 2016.
- 5.3 Higher proportions of businesses in the South West (41%) and South East (40%) pointed towards the good weather as a reason for more visitors over the holiday season, compared to other regions (North 30%; Mid 25%).

Happy Easter!

- 5.4 The late Easter has been cited by 13% of those who have seen an increase in visitor numbers as a reason for the lift. And 16% of serviced accommodation and caravan and campsites say that it has helped to boost business.

Shorter breaks

- 5.5 Through the open comments, some businesses report noticing people staying less time. Some have reduced the minimum number of nights visitors can stay and say this has helped encourage more bookings.

“Now taking shorter bookings, instead of weeklong ones.”

Self catering

“Changed to weekend bookings instead of just weekly.”

Self catering

“We decided to offer just weekends out of high season, instead of just a week as we previously did, and this has had a positive effect.”

Self catering

Weddings in Wales

- 5.6 A few businesses say that they have seen more couples tying the knot in Wales over the Easter period, which has helped lift their visitor numbers.

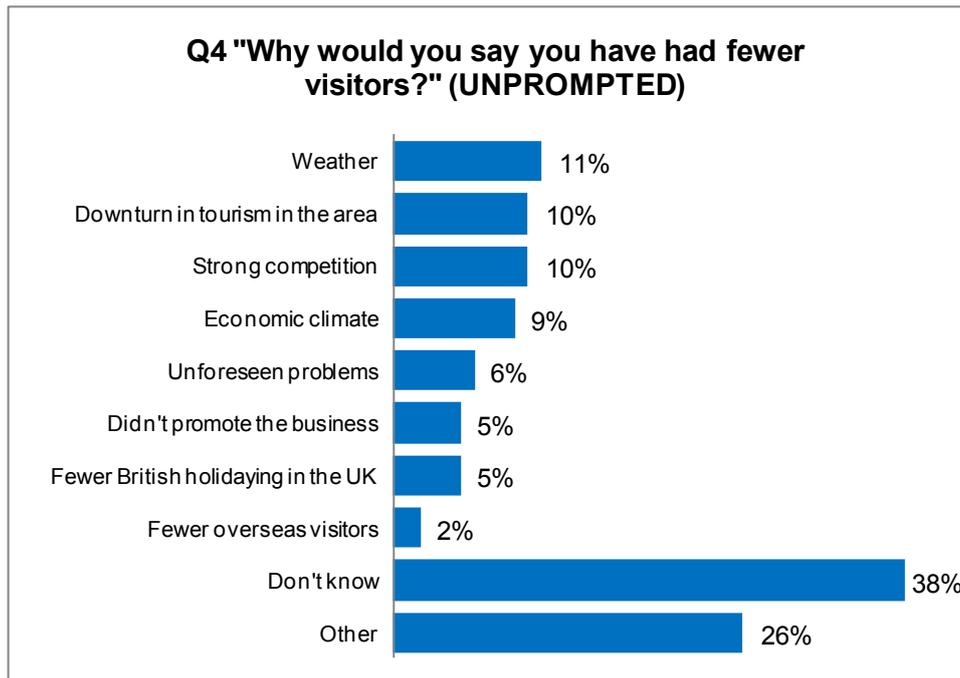
“Three weddings at Easter.”

Self catering

“More weddings.”

Serviced accommodation

6. REASONS FOR DECREASED VISITOR LEVELS



Some confusion over a drop in visitors

6.1 Around one in five (21%) of all business report fewer visitors over Easter compared to last year. But the reasons for the drop are unclear for 38% of these respondents, who say they don't know why they have had fewer visitors.

"I have had no visitors. I don't know why. The website, Facebook, Twitter and everything and is working. I don't know what's going on."

Serviced accommodation

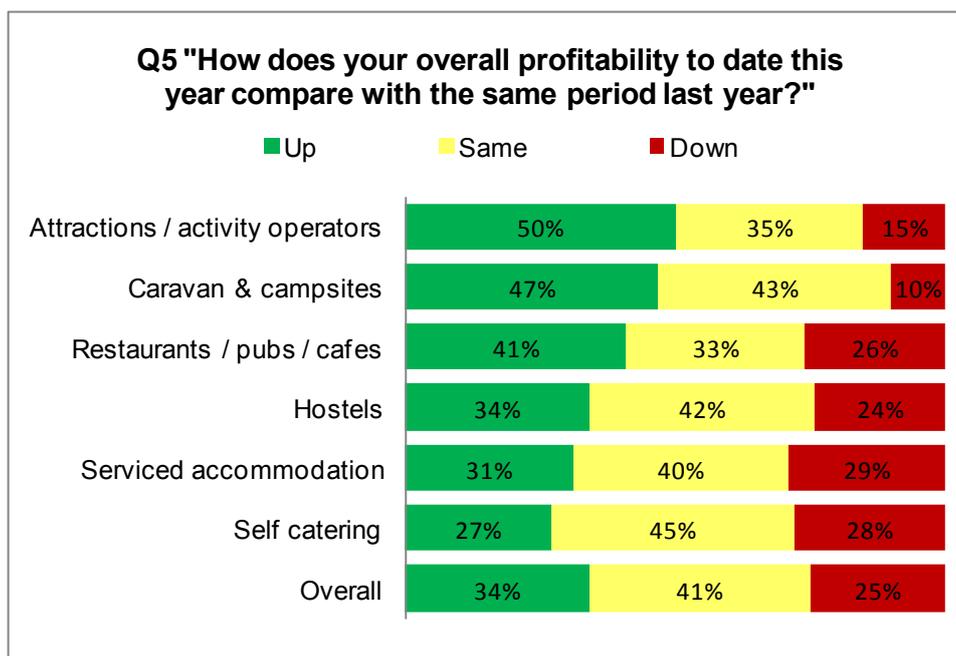
Weather put a dampener on Easter for some

6.2 While many businesses were pleased to see better weather entice more visitors to their business over Easter, a few (11%) pointed towards the weather as a reason for a drop in the number of people they welcomed.

"Weather was awful here this Easter. It was the first time we couldn't put up any pitches so we're down for now, but hopefully we'll be up once weather picks up."

Caravan / camping

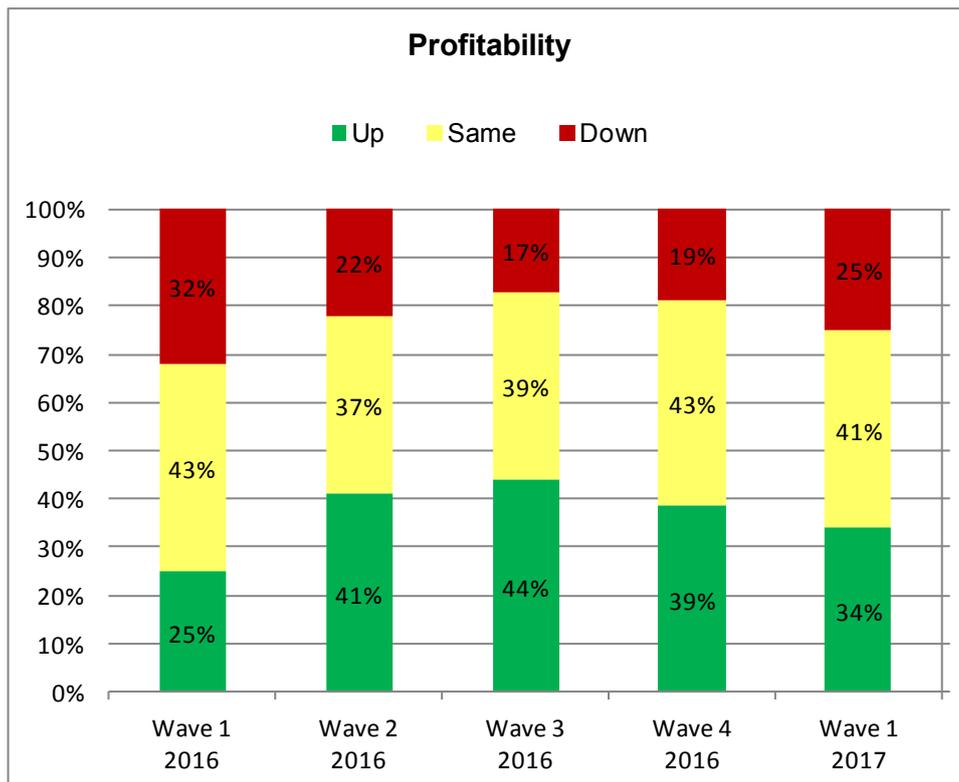
7. PROFITABILITY



Increased profitability for most sectors

- 7.1 Sectors have seen an increase in profits so far this year compared with the same period last year. Overall, a third (34%) of businesses have reported seeing higher profits.
- 7.2 Many attractions and activity operators have capitalised on good weather and the later Easter, with half (50%) reporting an increase in their profits. Similarly, 47% of caravan and campsite say the same.
- 7.3 It has also been an improved start to the year for restaurants, pubs and cafes, of which 41% have recorded higher profits compared to the same period in 2016.

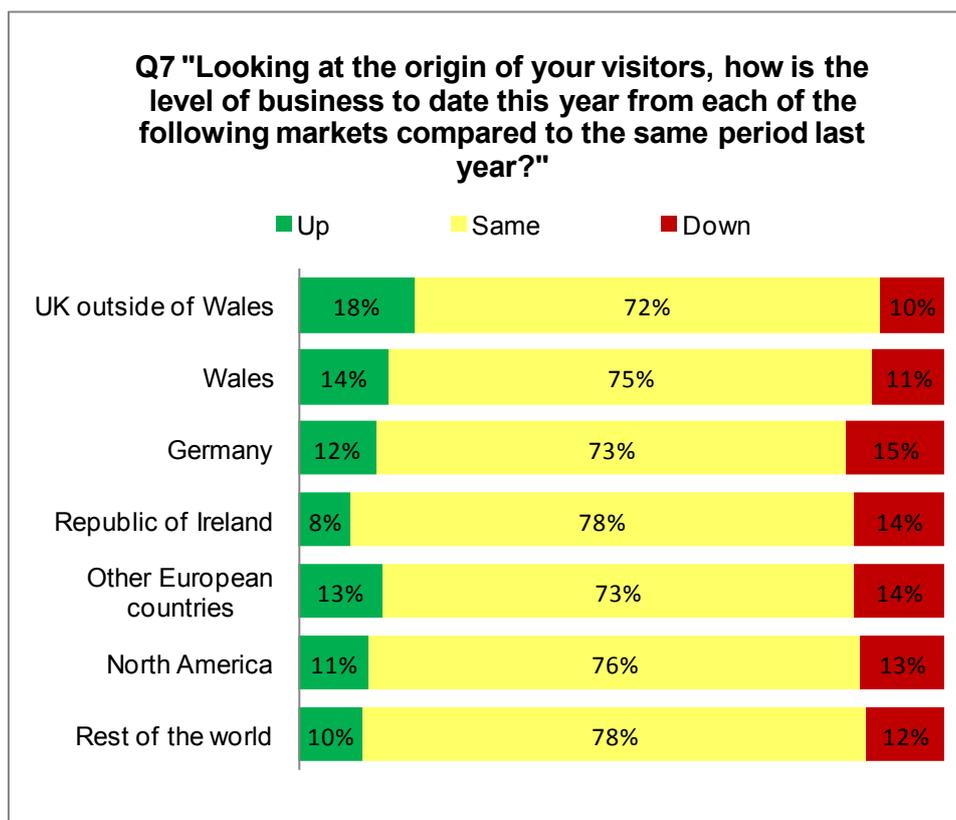
PROFITABILITY TRENDS



Profitability improved over the past year

- 7.4 Overall, there has been encouraging lifts in profits for tourism businesses across Wales since the start of 2016.
- 7.5 The industry looks to be in a stronger position than it has been, with around a third (34%) reporting increased profits at this point in the year compared with the same period last year, at which point a quarter (25%) reported to be up on 2015.

8. PERFORMANCE OF MARKETS



Steady performances across all markets

8.1 Market performances over the first months in 2017 have remained on par with last year for the majority of businesses.

Small improvements in Wales and UK

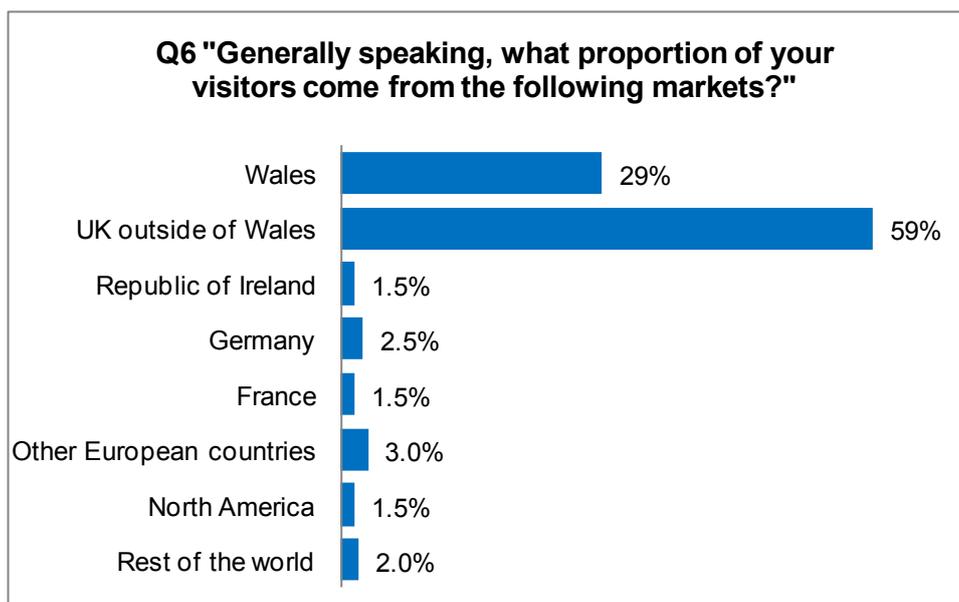
8.2 The UK outside Wales has been a source of more visitors for around one in five (18%) businesses, and 14% have welcomed more Welsh visitors, as more British people choose to holiday at home.

"We've definitely seen more UK (English) visitors in recent years."
Self catering

"We are getting a lot more English."
Caravan / camping

"We have had more English tourists this year so far."
Caravan / camping

SPREAD OF VISITORS BY MARKET



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

UK outside of Wales brings in three out of every five visitors

8.3 About three fifths (59%) of tourist visitors to/in Wales are from the UK outside of Wales. The Wales market provides 29% of the volume. Germany is the most significant single country outside of the UK, contributing about 2.5% of visitors.

8.4 Significant differences between sector include:

- The self catering sector receives a much higher proportion (74%) of UK (outside Wales) visitors than the other sectors
- Wales visitors are most represented among restaurants / pubs / cafés (48% of tourist customers), attractions & activity providers (45%) and caravan & campsites (45%).
- European (outside UK) visitors represent 15% of guests staying in hostels – higher than in other sectors

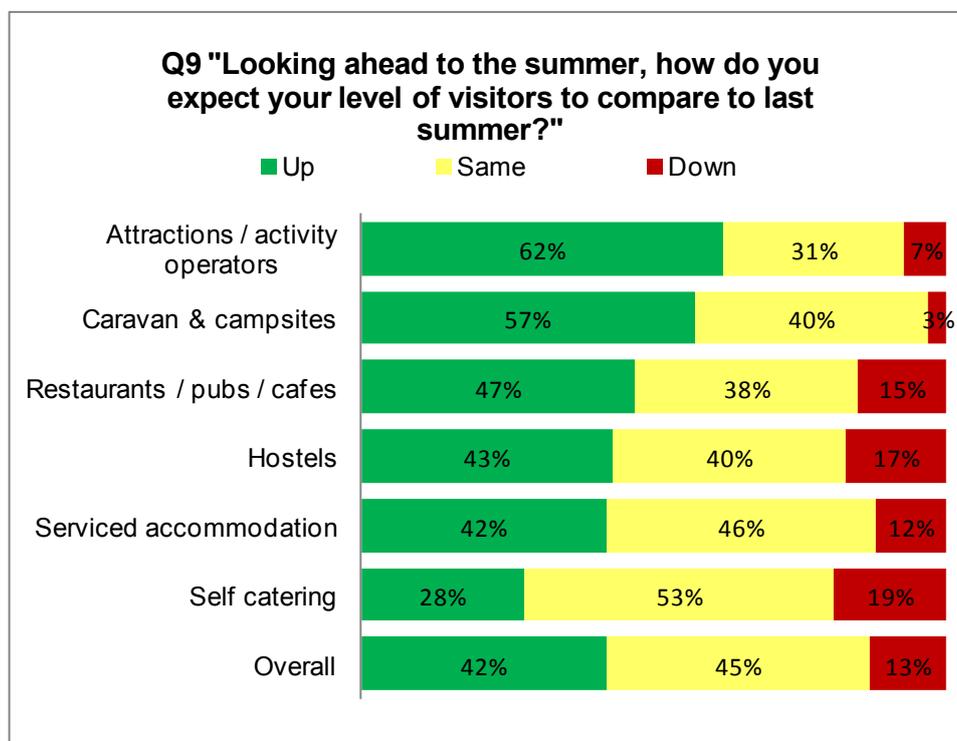
8.5 Significant differences by region of Wales include:

- South East Wales attracts the highest proportion (17%) of visitors from outside the UK
- North Wales attracts the highest proportion (71%) of UK (outside Wales) visitors

8.6 All of the above results are very similar to the last time this question was asked (September 2016).

9. EXPECTATIONS AND CONFIDENCE FOR THE SUMMER

EXPECTATIONS BY SECTOR



Well-performing summer expected

- 9.1 Around two in five (42%) businesses expect to welcome more visitors during the summer this year compared to the summer of 2016.
- 9.2 Many businesses are already taking advance bookings for the coming season, and some are fully booked over the summer. Advance bookings seem to be increasing, helping businesses look to the coming months with an air of positivity.

Busy season for attractions and activity operators

- 9.3 The summer looks bright for attractions and activity operators, with 62% expecting to receive more visitors than last year. While many hope a warm, dry season will bring in the guests, there are other factors contributing to the high expectations.
- 9.4 Some have noticed an increase in the number of advance bookings they take.

"We're basically getting bookings in, in advance – we work three to nine months in advance."

Activity operator

"As more people know we are here, we already have courses full for the summer. This didn't happen until probably June last year."

Activity operator

- 9.5 Other factors include more promotional activity and improving or increasing the number of events run, to attract bigger numbers.

“We are doing some promotions, so I think they will go well.”
Attraction

“The events we are putting on will increase visitors, I am confident about that.”
Attraction

“Increases due to own marketing strategy and social media.”
Activity operator

Weather-dependent campsites hopeful for sunny season

- 9.6 With summer on its way, 57% of caravan and campsite businesses are expecting more people to pitch up on their sites this year compared to last year. But all eyes are on the skies – with hopes for a warm, dry season.

“It's very much going to depend on the weather, but we are fairly confident.”
Caravan / campsite

“We expect to be fully booked this summer.”
Caravan / campsite

“We are getting a lot of bookings so far, so we are very optimistic.”
Caravan / campsite

“Feeling confident for summer but business is very weather dependent.”
Caravan / campsite

Eating out is on the rise

- 9.7 Nearly half (47%) of all restaurants, pubs and cafes are expecting to serve more hungry customers this summer. Like some other sectors, there are hopes that good weather will encourage more visitors to venture out in Wales, as the sun encourages people to get out and about.

“We are confident and ready for it, as long as the sun's out!”
Restaurant / pub / café

“I am expecting double the number of visitors this summer.”
Restaurant / pub / café

Hostels to offer beds to more guests

- 9.8 With a good Easter behind them, this summer is expected to bring more visitors through the doors of 43% of hostels across Wales, and bookings are already rolling in for some.

“Numbers have been up so far and we’ve got quite a few pre-booked for the summer.”

Hostel

“We already have advanced bookings, very busy.”

Hostel

Lift predicted for serviced accommodation

9.9 Around two in five (42%) respondents from the serviced accommodation sector are preparing for a summer with more visitors than last year. Like other sectors, there seems to be a lift in the number of visitors booking in advance.

“We’re fully booked until July. In previous years we would have last minute bookings, whereas now we have bookings all through summer.”

Serviced accommodation

“We are getting booked way quicker than last year.”

Serviced accommodation

“We’re full! We’ve got lots of bookings in place already.”

Serviced accommodation

“We are 50% up on any previous year in terms of advanced bookings. The volume of business continues to grow.”

Serviced accommodation

Less growth expected for self catering operators

9.10 Compared to other sectors, a significantly smaller proportion (28%) of self catering businesses are expecting more visitors this summer. More than half (53%) expect the same number of visitors as the summer of 2016.

9.11 Like other sectors, many businesses say that advance bookings are already rolling in for the coming season.

“We’re fully booked for summer.”

Self catering

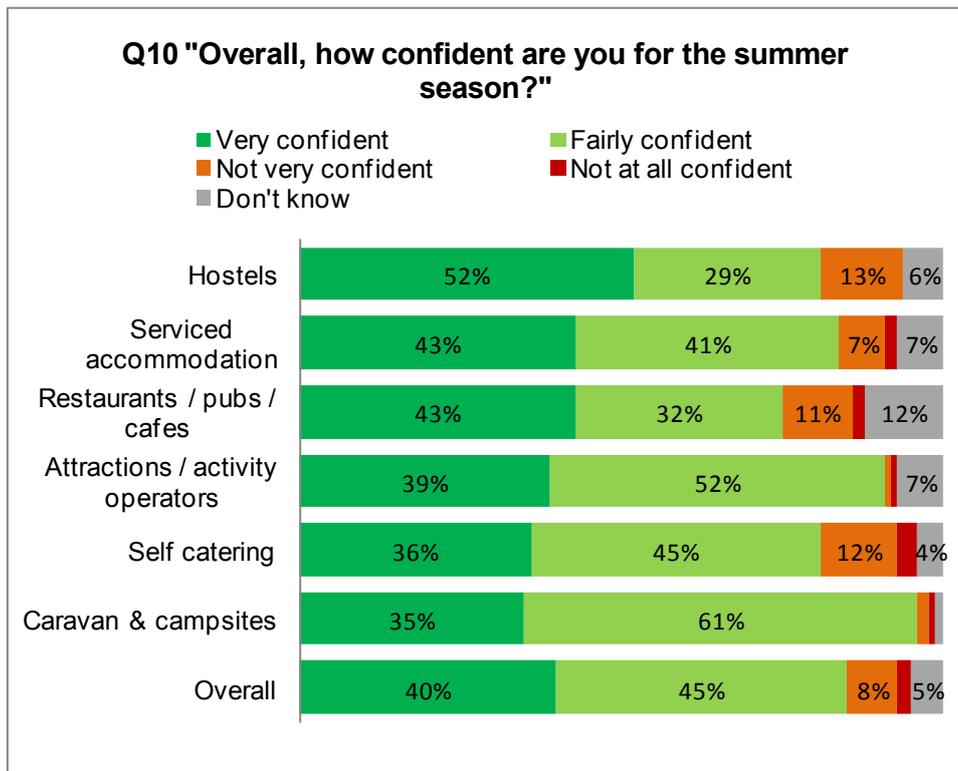
“We had very good summer last year, hoping to continue this summer.”

Self catering

“I was full last year and am this year.”

Self catering

CONFIDENCE BY SECTOR



Soaring confidence heading into summer

9.12 There is an encouraging amount of confidence across the tourism industry, as warm summer days bring with them high hopes for business performances.

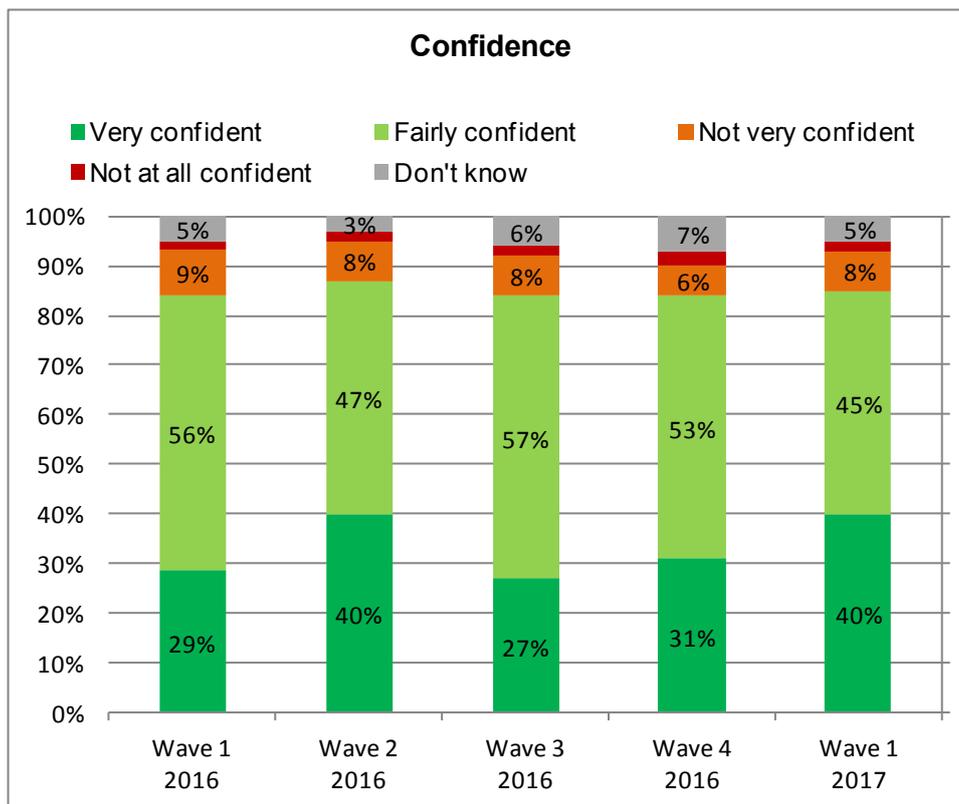
9.13 With many already seeing advance bookings roll in for the summer, and following a good Easter, the majority (85%) of responding business are confident for the coming months.

"We are getting quite a lot of bookings so I'm very confident."
Serviced accommodation

"We are very confident for the summer season. We expect business to be quite steady."
Caravan / campsite

"We have been full every summer and advanced bookings are good. We have always improved year on year."
Serviced accommodation

CONFIDENCE TREND

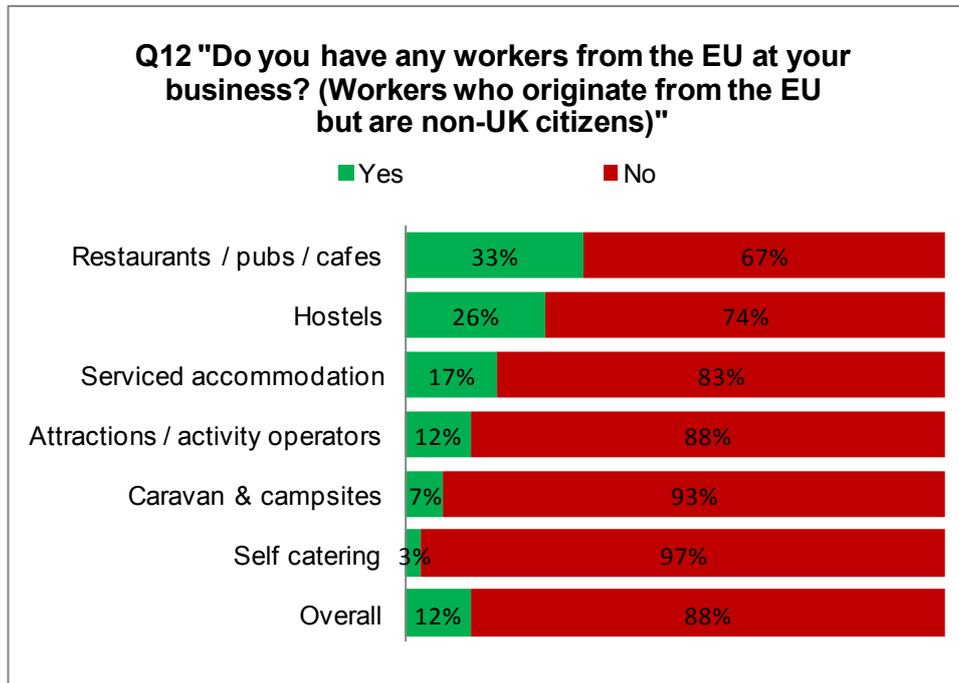


Encouraging confidence continues

9.14 The combined confidence trend across each wave shows that Wales' tourism industry is in good spirits. Compared to 12 months ago, there has been an improvement in the proportion of 'very confident' businesses, rising to 40% from 29% last Easter.

10. BREXIT AND EU WORKERS IN WALES

EU WORKERS IN TOURISM BUSINESSES



Higher proportions of EU workers in eateries and hostels

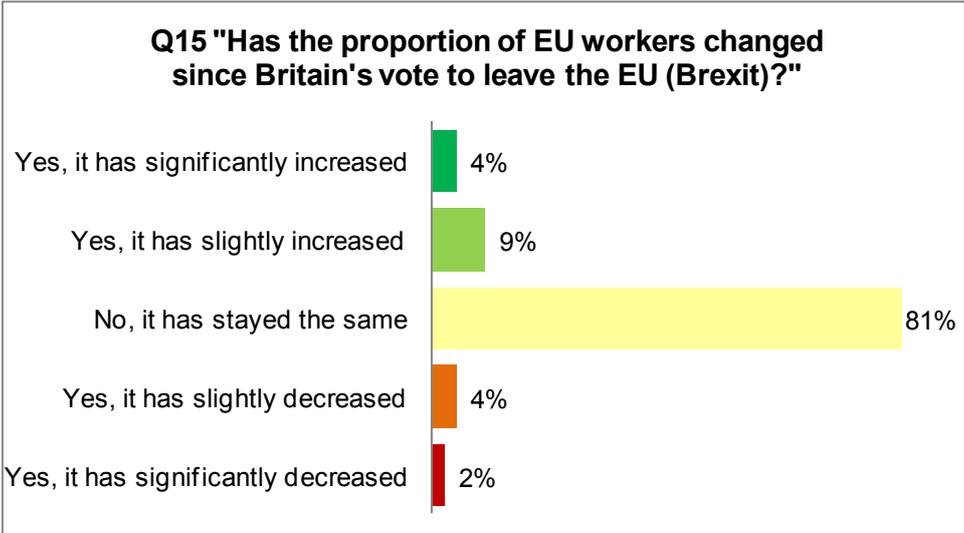
10.1 Overall, 12% of businesses in the tourism industry have people working for them who originate from the EU but are not UK citizens. This is true for higher proportions of restaurants, pubs and cafes (33%) and hostels (26%), along with serviced accommodation (17%).

"We rely on overseas workers."
Restaurant / pub / café

EU workers represent approximately 4% of the workforce

10.2 Using data provided by operators on the number of people they employ and the proportion of EU workers, approximately 4% of all workers in the tourism industry in Wales are non-UK citizens from the EU. This proportion is highest among hotels (9% of workers are from the EU) and restaurants, pubs and cafes (5%).

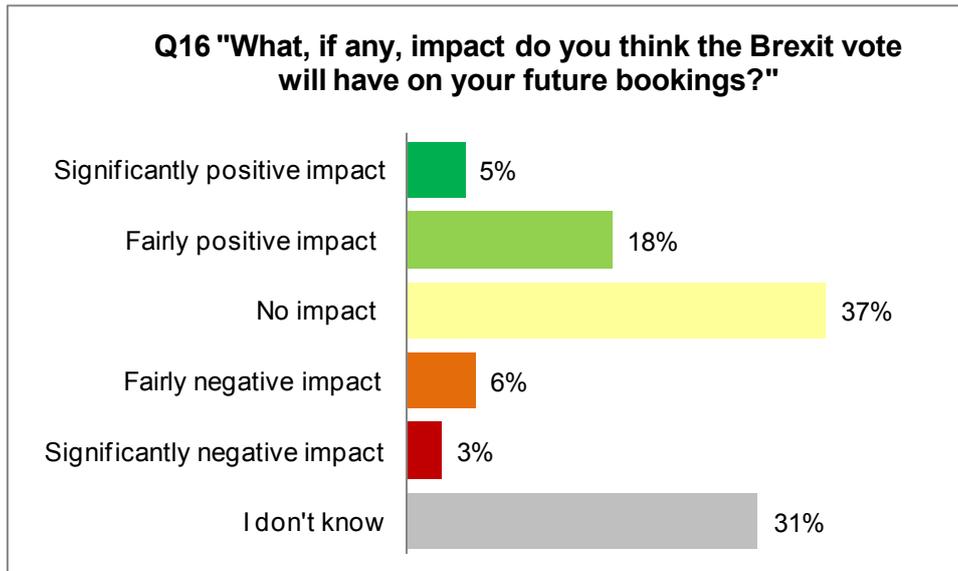
PROPORTION CHANGES



Slight increase in EU workers since Brexit vote

10.3 While the majority (81%) of businesses who have EU workers say that there has been no change in the proportion they employ, 13% say they have taken on more compared to 6% who have fewer EU workers since Britain’s vote to leave the European Union.

IMPACT OF BREXIT



Some hope for a positive post-Brexit impact on bookings

- 10.4 The long-term impact of the Brexit vote is yet to be seen. For Wales' tourism industry, there is a level of uncertainty on how businesses will be affected, with 31% unable to predict how it may impact visitor numbers.
- 10.5 Nearly two in five (37%) do not think the Brexit vote will have any impact on their future bookings.
- 10.6 But of those that do predict an impact on bookings, a higher proportion (23%) expect a positive impact compared to those who think the Brexit vote will have a negative impact (9%).

More staycations expected

- 10.7 One of the most frequently mentioned reasons why businesses expect a positive impact on bookings, is the drop in value of the pound. Some expect this to result in more Brits holidaying at home as overseas destinations become less value for money.

"If the exchange rate drops, then people will be more inclined to stay in the UK for holidays."

Self catering

"With the Euro being quite strong compared to the sterling or the dollar, people tend to stay in the UK."

Serviced accommodation

"We're hoping more people will have staycations as a consequence of Brexit."

Restaurant / pub / café

UK to increase in value for overseas visitors

10.8 Should the pound remain lower than its pre-Brexit value, overseas visitors could get more value for money, making the UK – including Wales – financially more appealing as a destination. Should this be the case, many businesses hope that they will see more visitors from abroad.

“The pound has dropped so more Europeans holidaying here.”

Serviced accommodation

“The main impact seems to be the pound losing value against the Euro. I would expect more people from the continent, which should be a positive impact.”

Self catering

“More Brits holidaying in UK and overseas visitors arriving as the pound is weaker.”

Caravan / camping

Britain viewed with caution

10.9 Some respondents who expect the Brexit vote to have a negative impact on their future bookings believe that overseas visitors will give the UK a wide berth and choose to holiday elsewhere. Some visitors – especially Europeans – are perceived to view the country as one that is unwelcoming to overseas visitors since the decision to remove Britain from the EU.

“Image of UK has been adversely affected – seen to be unwelcoming and racist.”

Self catering

“People will give Britain a wide berth.”

Serviced accommodation

“The attitude towards foreigners, people are more concerned about the response they might get.”

Self catering

“I just think we're distancing ourselves from Europe and that people won't be inclined to visit as much.”

Self catering

Perceived drop in visitor confidence

10.10 There remains a feeling of uncertainty about how the Brexit vote will impact the country, and some businesses think that this will result in a tightening of pockets, with a predicted drop in visitor numbers.

"I think it will have a fairly negative impact as people are currently quite wary of the uncertainty of the situation and they are quite careful with money. They're not caring as much about holidays but more about saving for the future."

Caravan / campsite

"Confidence has gone, people are trying to make the money go further, people aren't spending much at the moment."

Serviced accommodation