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Wales Tourism Business Barometer

Wave 1, April 2018

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Wales Tourism Business Barometer: Wave 1, April 2018

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@gov.wales

Department: Department for Science, Economy and Transport

QED Centre

Treforest Estate

Pontypridd

Rhondda Cynon Taf

CF37 5YR

Tel: 0300 061 6026

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1. HEADLINE FINDINGS

Easter performance affected by poor weather

- 1.1 Easter 2018 has been a very challenging period for the tourism industry in Wales. Some (18%) operators have had more visitors than last year, and about two in five (42%) have had the same level. However, two in five (40%) operators report being down.
- 1.2 The majority (69%) of operators who report being down cite weather as a reason. This is by far the most frequently mentioned reason in every sector and region.
- 1.3 Attractions & activity providers have performed the best of any sector – largely helped by many attractions having an indoor offering. Around a third (31%) of attractions / activity providers have managed to increase their visitor levels this Easter.
- 1.4 All four regions of Wales have experienced a downturn in tourism over Easter compared to last year.

Positive outlook for the rest of the year however

- 1.5 In spite of a disappointing Easter and a difficult start to the year generally, many operators are positive about the rest of the year. About a quarter (23%) say they are 'very confident' for the rest of the year, and over half (55%) say they are 'fairly confident'.
- 1.6 This high level of confidence going forwards is reflected across every sector and region.

2. QUALITATIVE FINDINGS

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

A poor start to the year caused by poor weather

- 2.2 Industry leaders say they have received calls from members to say how poor the year has been so far, bucking the trend of continual growth throughout 2017.

“2017 was very good, but the start to this year hasn’t been great”

“2017 was very good, all year round, but 2018 hasn’t started off well”

- 2.3 A key reason for this is the recent cold spell, which brought snow to many parts of Wales on several occasions. This has not only deterred people from booking holidays in Wales, but it has also caused many to cancel holidays they had already booked.

“We have had a poor start because of the weather. It has been wet and obviously the snow caused a lot of problems.”

Rain, sleet and snow continued into the Easter Weekend

- 2.4 Poor weather has also been the reason for a poor Easter weekend. Some areas of Wales experienced further sleet and snow, while other areas were hit by heavy rain.

“Easter has been the main problem. That was a wash-out and we normally get a lot of business around then.”

But most remain confident for the rest of the year

- 2.5 Despite this, most are confident for the rest of 2018. Some even report that those who cancelled earlier in the year have re-booked for later in the year.

“There were a lot of cancellations because of the snow, but businesses are saying that people are re-booking for later in the year”

“Accommodation providers are getting forward bookings for the rest of the year. They are very confident.”

- 2.6 Despite most being confident, one industry leader is keeping a close eye on performance as their members reported poor performance even before the cold weather struck.

"We had quite a number of members contact us between January to March saying they have been quieter than normal, not just because of the snow. I'm a little bit concerned as it is across all sectors."

No change on Brexit

- 2.7 In previous waves of this survey, industry leaders told us that it was too early to know what the implications of Brexit will be, and they were waiting to see what would happen. This waiting could continue for some time given that a 'transition phase' may last until 31st December 2020.

"We had a meeting this week and Brexit wasn't even mentioned. It's still very much in the background."

- 2.8 Some say that the only effect so far has been positive due to the fall in the value of the pound immediately after the referendum (although the pound has since regained some ground).

"If anything, I think it [the lower pound] has made people more likely to visit. Looking to the future, who knows what it will hold but I don't think anyone is particularly depressed about it."

- 2.9 As a result, industry leaders say businesses aren't having to make any changes just yet.

"We're just plodding along. There's nothing that we are particularly doing, but equally there's nothing that we particularly aren't doing. It's pretty much business as usual."

"Let's not worry about Brexit. Let's worry about more immediate issues."

Getting businesses online

- 2.10 One such immediate issue could be getting more businesses online. Some industry leaders fear for those who do not increase their online presence.

"People are searching for information through a variety of channels now, like social media, and I fear that some businesses will suffer if they don't keep up"

"Many that are doing well are those using booking.com and Airbnb"

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 2018, 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 806 interviews by telephone, and the online survey distributed by area and sector partners has yielded an additional 88 responses. The overall sample of 894 makes results of questions asked to everyone accurate to $\pm 3.3\%$.
- 3.5 The sample of 894 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	116	48	68	58	290
Self catering	101	66	88	36	291
Caravan / campsites	44	17	21	6	88
Hostels	9	10	9	8	36
Attractions	30	13	22	26	91
Restaurants / pubs / cafes	11	18	8	12	49
Activity operators	19	9	16	5	49
Total	330	181	232	151	894

- 3.6 About two thirds (64%) of businesses in the sample are currently graded by Visit Wales, and 36% 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

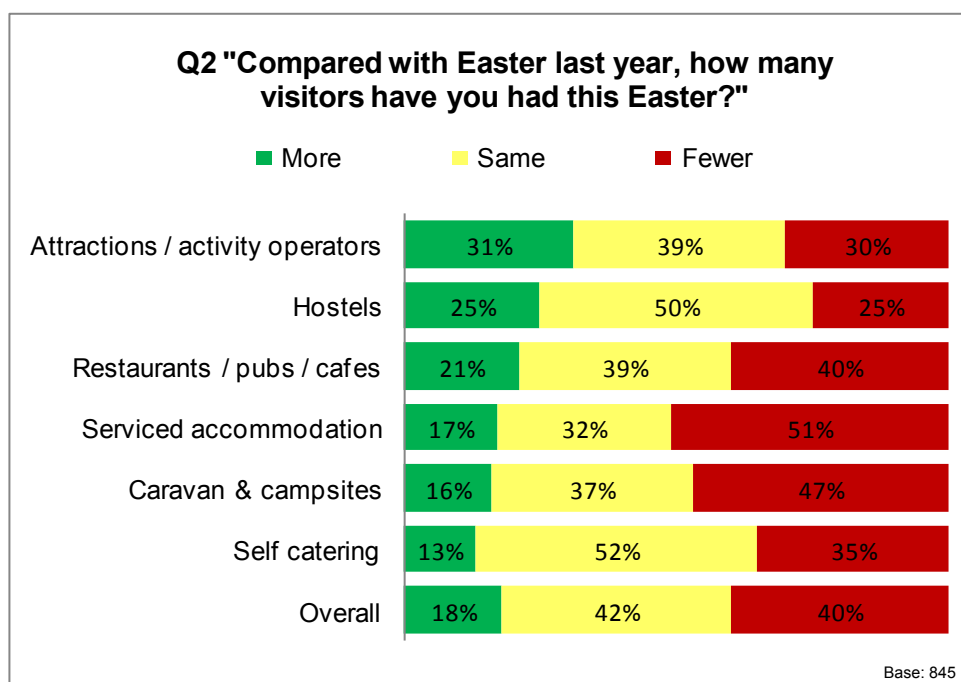
tourism footfall across different parts of Wales and have been asked to answer questions in the context of their tourist (i.e. non-local) customers.

- 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.

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

4. EASTER PERFORMANCE

PERFORMANCE BY SECTOR



Performance affected by poor weather

- 4.1 The tourism industry in Wales has experienced a disappointing Easter, mostly due to poor weather. Some (18%) business have managed to increase their visitor levels, but two in five (40%) have had a decrease.

"We had about a thousand pounds' worth of cancellations because of the weather"
Caravan park, Mid

Heading indoors to escape the rain

- 4.2 Attractions & activity providers have performed the best of any sector. A key reason for this is that many attractions have an indoor offering, thus giving people somewhere to go during periods of wet weather.

"Very rainy weather, which is good for our business as it's indoors only"
Attraction, North

Tough period for serviced accommodation

- 4.3 One in six (17%) serviced accommodation operators have increased their visitor levels this Easter, but half (51%) have experienced a decrease.

"We attract a lot of walkers. The weather has been so terrible – we have hardly had any guests in."

Serviced, South East

Self catering sector facing additional pressures

- 4.4 The self catering sector has been down on balance over Easter. As well as the weather hampering the sector as a whole, some operators have suddenly come under a lot of pressure from Airbnb.

"There used to be only three or four accommodation providers in the area. Now with the introduction of Airbnb, who don't have to abide by the same regulations, there seems to be so much more for people to choose from."

Self catering, South East

"In our area, Airbnb is encouraging competition but it's not graded. It's a concern – what about fire regulations? We have been established for over 18 years and are graded. It feels like supply is outstripping demand."

Self catering, South East

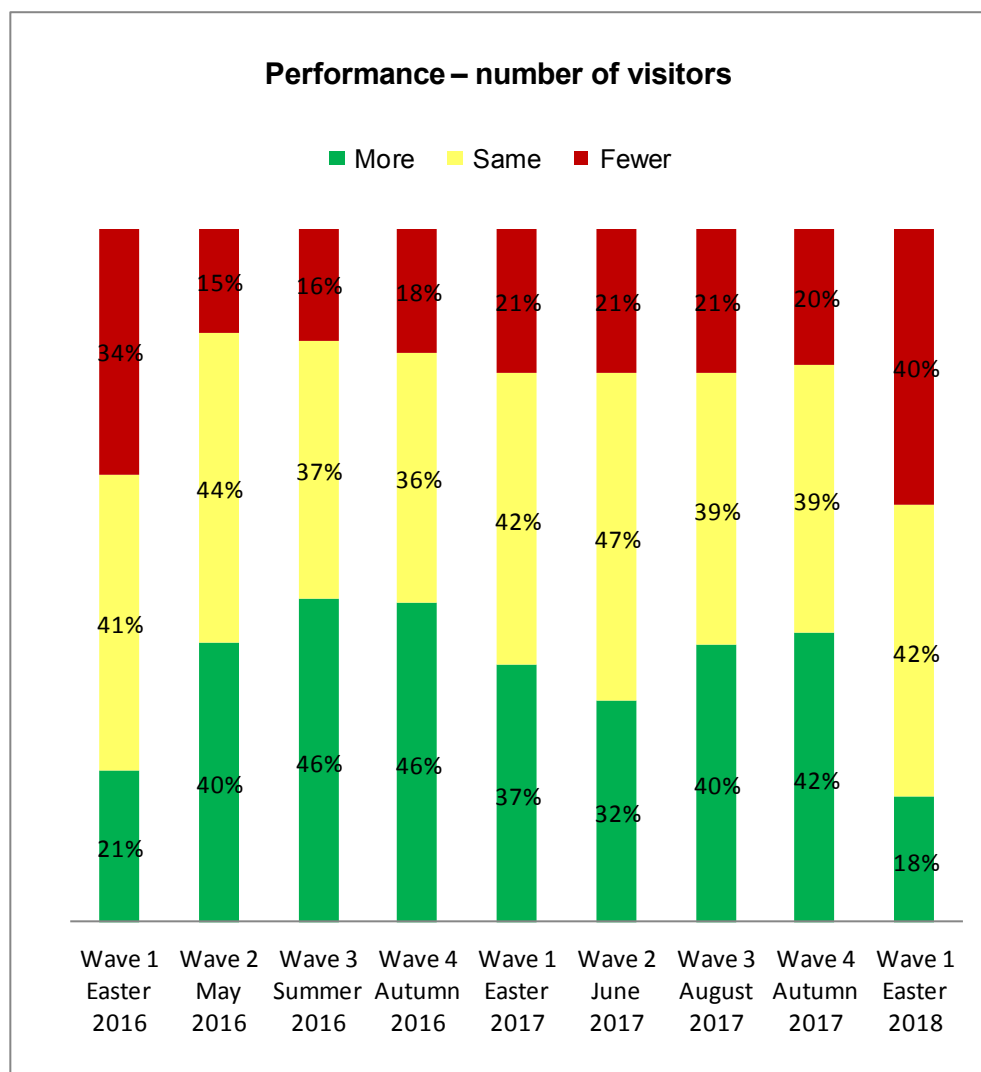
Unfortunate weather for camping

- 4.5 Not surprisingly, the caravan & camping sector was always likely to be one of the sectors strongly affected by the poor weather. Around half (47%) report being down over Easter.

"We would have been up. We had more bookings but the wet weather hindered us and we had to cancel."

Caravan park, South East

PERFORMANCE TREND



Hopefully just a temporary knock on visitor levels

- 4.6 The tourism industry was showing signs of consistent growth year on year until this Easter. Open comments show that it is not just Easter that has been a tough period – rather the whole year to date because of the poor weather.

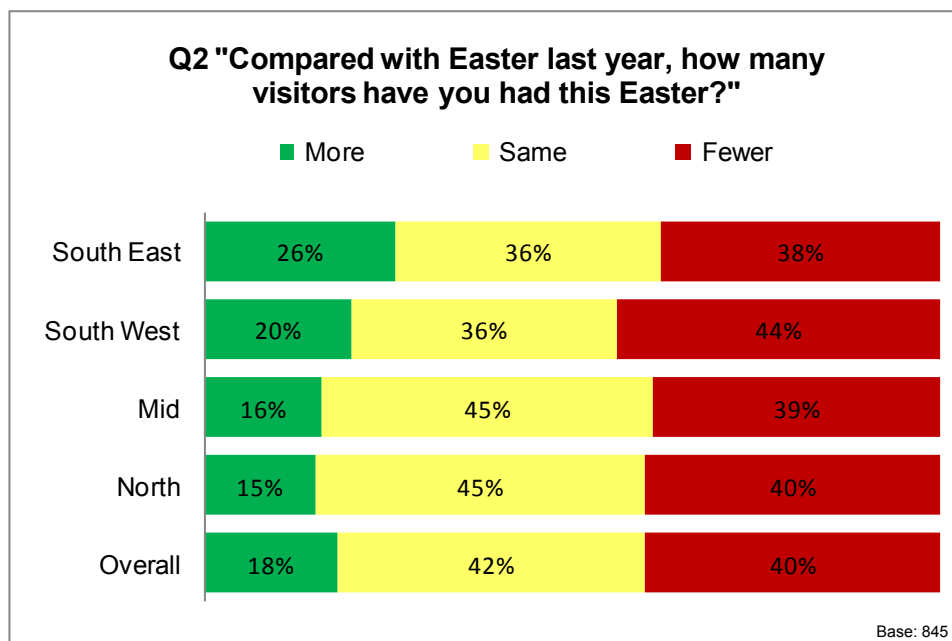
“It’s the worst start to the year over the last 10 years in business. Usually by March, trade has picked up.”
Café, North

“It’s been a dreadful start to the year. January to March has been very well below last year.”
Serviced, South East

- 4.7 Expectations going forwards (discussed later in Section 9) suggest that this tough period is hopefully just a temporary blip within a longer term upward trend. Often, an early Easter sees

fewer visitors for operators. The early Easters in 2018 (April 1) and 2016 (March 27) did not perform as well as the later Easter in 2017 (April 9).

PERFORMANCE BY REGION



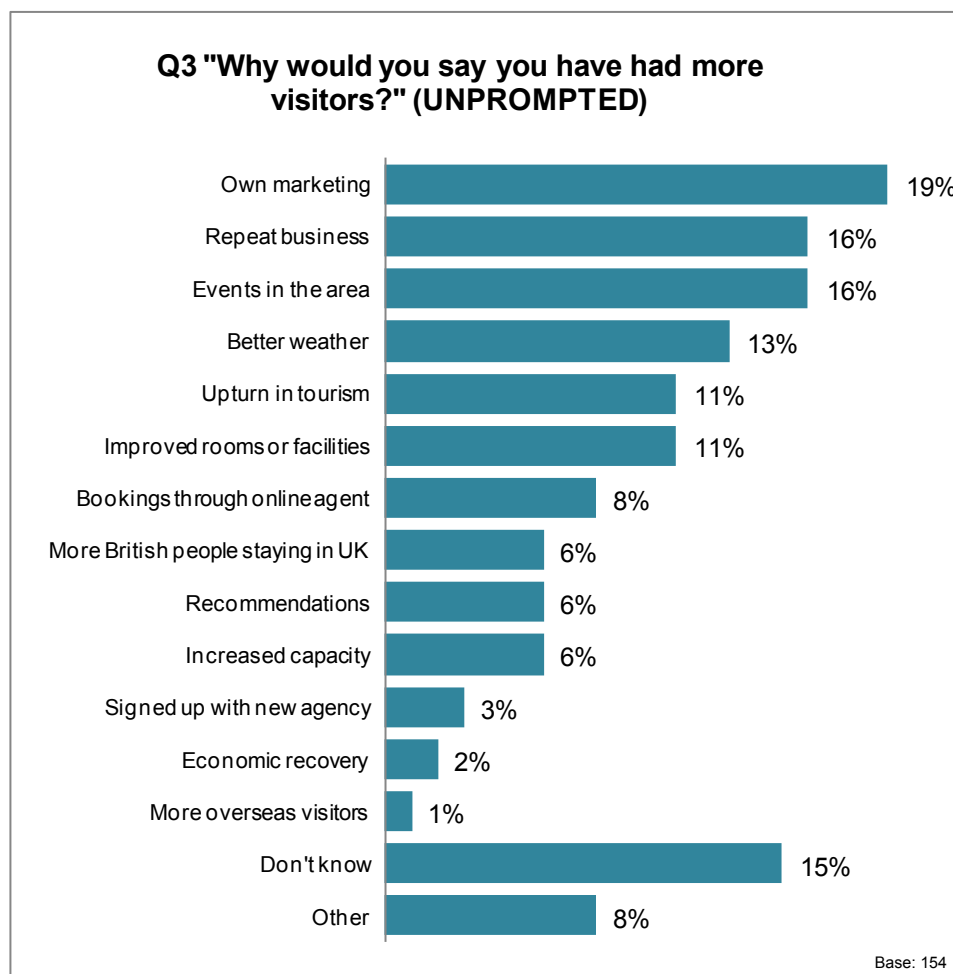
Challenging period for all regions of Wales

- 4.8 The decline in visitor levels has been experienced by operators in all four regions of Wales. South East Wales has seen some of the poor weather effect countered by events, most notably the Anthony Joshua boxing world title fight, which took place on Easter Saturday.

"The Anthony Joshua boxing match drew more visitors to us this Easter"
Serviced, South East

"We were rammed because of the boxing"
Serviced, South East

5. REASONS FOR INCREASED VISITOR LEVELS



Own marketing can help overcome challenging times

5.1 Some operators have marketed their business so strongly that even the poor weather could not prevent them from increasing their visitor numbers.

"We have won a few awards and are promoting ourselves on social media and websites. The business keeps growing."

Serviced, South West

"On Good Friday we were rushed off our feet as we held an egg hunt for children"

Attraction, South East

"We're very active with marketing"

Serviced, South East

Repeat customers

- 5.2 Repeat customers are very important in the tourism industry, and they can bring stability during the more difficult periods.

"I have loyal customers. One family has been coming every Easter for the last 40 years since they were children, and now they are grown adults, they come with their own families."

Serviced, South East

'Better weather' – if your attraction is indoors

- 5.3 Most of the answers coded as 'better weather' mean better weather from the operator's own perspective of running an indoor attraction, or a business which benefits from or is unaffected by rain. The fortunes of different types of attraction can vary greatly when the weather is extreme.

"All our tours are underground, so more people come in wet weather"

Attraction, North

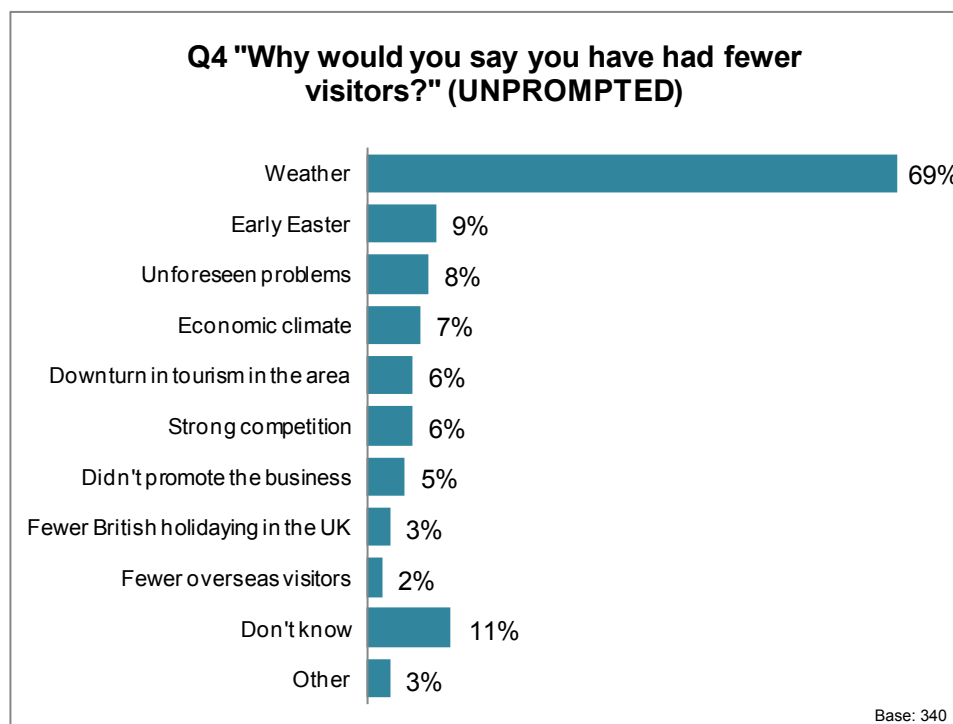
"Last year there was hardly any water in the river so people cancelled their bookings"

Hostel, North

"Very rainy weather, which is good for the business as it's indoors only"

Attraction, North

6. REASONS FOR DECREASED VISITOR LEVELS



Rain, cold and even snow

6.1 The weather in Wales over Easter has been cold for the time of year, wet, and in some parts even snowing.

"I think the bad weather impacted us. It was cold, miserable and forecast to snow."
Self catering, North

Damage to properties

6.2 The weather has affected businesses in different ways. Besides a general lack of tourists willing to travel, some operators suffered the misfortune of damage to their properties before Easter.

"We had a flood so we weren't able to let out the rooms. The damage needed to be fixed before we could advertise again."
Serviced, South West

"We had a burst pipe and had to redecorate. We lost three bookings."
Self catering, Mid

Weather forecast made business even worse than it should have been

- 6.3 Some operators, especially in North Wales, say that the extreme messages about the weather in some sections of the media put people off coming, when the reality turned out to be not as bad.

"We were affected by the poor weather news ... cancellations 8 days before Easter due to the news stating do not travel ... Easter Saturday and Sunday were fine, but it was too late"

Activity operator, North

"The forecast was far worse than the actual weather so we got a lot of unnecessary cancellations"

Serviced, North

"The media were telling people to stay indoors"

Serviced, Mid

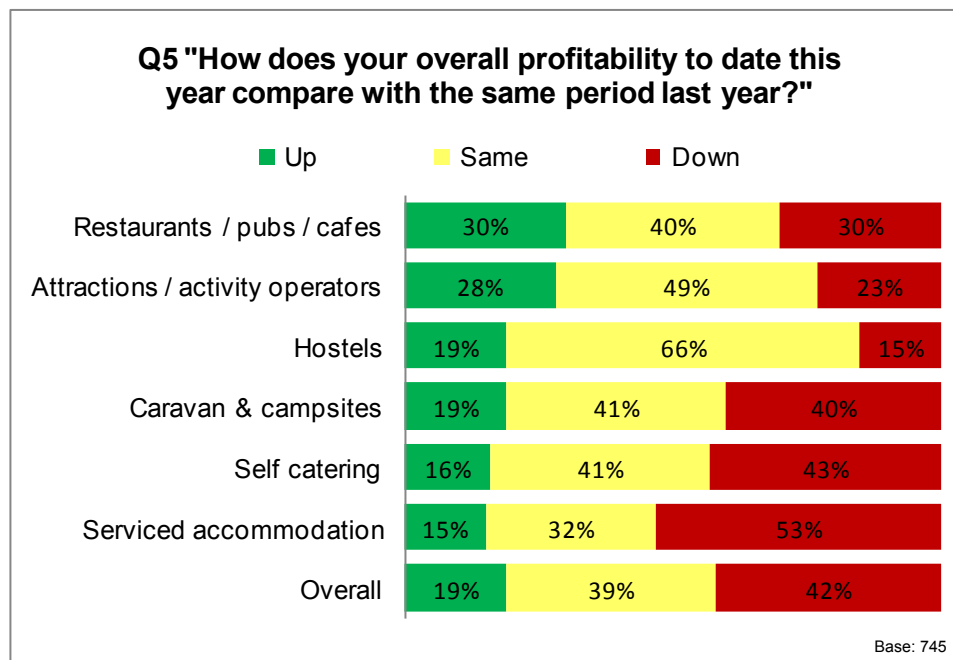
Early Easter

- 6.4 When Easter falls early, it is normal for some operators in the tourism industry to cite this as a reason for business being down. This is linked to the weather.

"Our business is so weather-dependent that when Easter is as early as this year, it has a huge impact"

Caravan park, Mid

7. PROFITABILITY



A number of factors contributing to reduced profitability

- 7.1 Overall, about one in five (19%) businesses have experienced increased profitability to date this year, but about two in five (42%) have had a decrease.
- 7.2 The key factors affecting profitability appear to be:
- Reduced visitor numbers due to poor weather
 - Rising costs across a number of areas
 - Competition from Airbnb
 - Sacrificing margin for volume by signing up to online travel agents (OTA)

Rising costs

- 7.3 The cost of operating a tourism business is rising in numerous ways, and this puts strain on profit margins unless the operator feels they can raise their prices accordingly without losing volume.

"Profit is falling due to increased costs such as rates, payroll, utilities, food and liquor"
Serviced, South East

Competition from Airbnb

- 7.4 From the open ended comments, some operators say they are having a hard time competing with Airbnb, which can offer lower prices by not incurring the same operating costs.

"We are having fewer enquiries because traditional B&Bs are being outnumbered by Airbnb properties. They have no regulatory costs and so can undercut traditional B&Bs."

Serviced, Mid

"Business is very poor. There are far too many Airbnb places available."

Serviced, Mid

Margin vs volume

- 7.5 Serviced accommodation operators continue to face the dilemma of choosing between signing up to a major OTA such as booking.com and therefore sacrifice margin to gain volume, or retain their margin but have a harder time competing.

"Booking.com take a lot of commission, so we're not making as much"

Serviced, North

"I don't use sites like booking.com. I only use my own website."

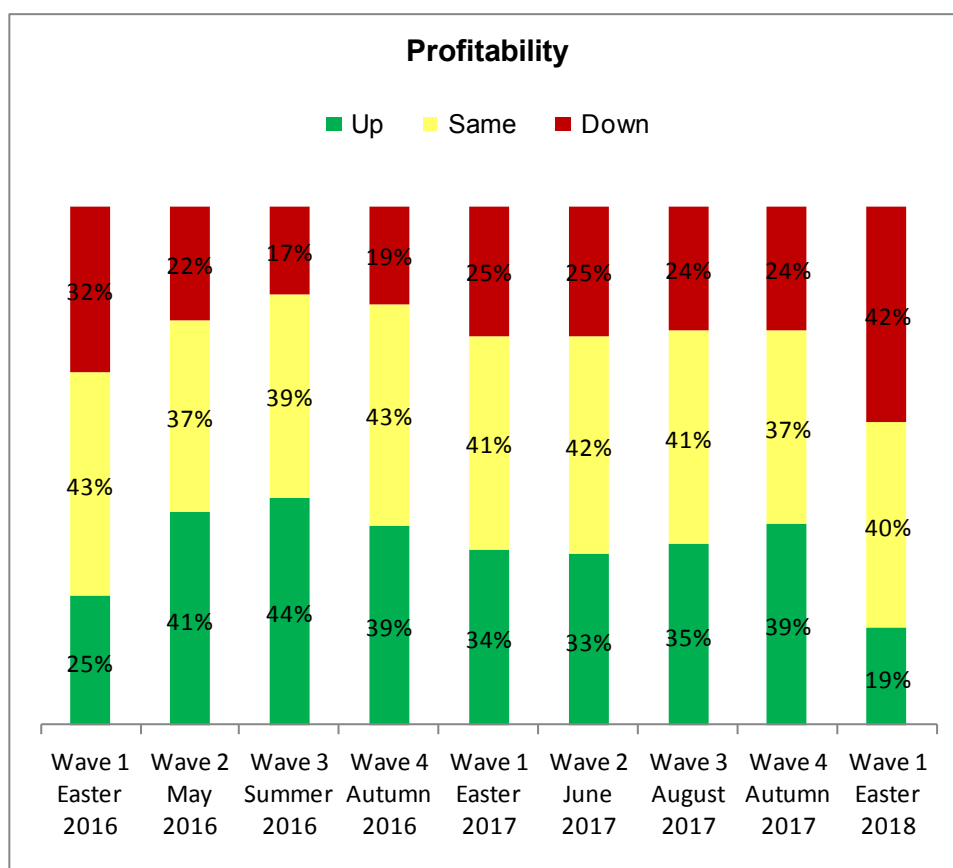
Serviced, South East

- 7.6 Self catering operators have a similar decision to make between remaining independent or signing up to an agency.

"We went with a new agency to take away some of the strain because people are using the internet a lot now and I don't have the time to go on the computer to sort out bookings. The agency takes a lot of commission which means we do have to work harder to make a profit."

Self catering, South West

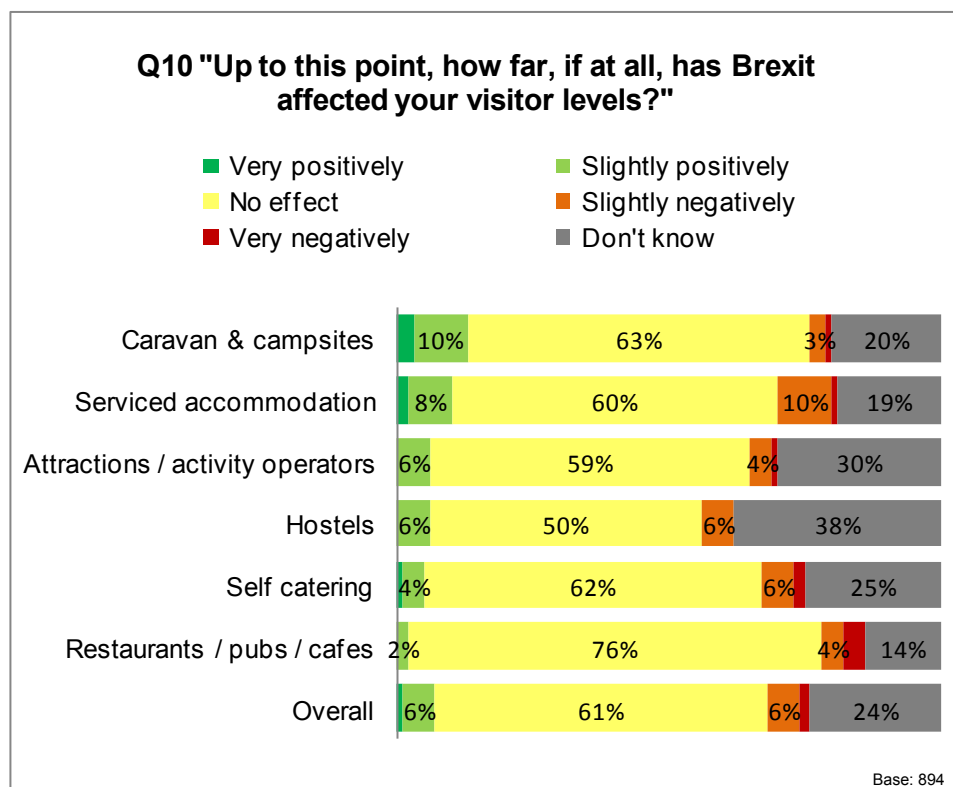
PROFITABILITY TRENDS



Change in profitability in line with visitor level decline

7.7 Profitability in the industry had been looking healthy until this latest period. As with visitor levels, it remains to be seen whether this could just be a blip within the longer term trend of increased profits.

8. IMPACT OF BREXIT



Brexit has had little effect on visitor levels to date

- 8.1 Since Britain voted to leave the European Union, tourism operators have noticed little impact on their visitor numbers, with 61% saying they have seen no effect and a quarter (24%) unsure of any impact.
- 8.2 The proportions seeing an effect, either in a positive and negative way, are very similar. Overall, 7% have seen a positive impact and 8% report a negative impact on their visitor levels.

Mixed results on staffing impact

- 8.3 Most operators say that Brexit has had no impact on their staffing levels, largely because they run the business with their family, friends or a very small number of staff – if they have any staff at all.
- 8.4 However, for those that do employ in more substantial numbers, many are already having trouble recruiting or retaining non-British staff. Even though Britain has not yet left the EU, the prospect of the move has made things more difficult for some of their staff and potential staff.

"One European left because she didn't feel comfortable anymore – she left because she felt unwanted"

Hostel, South East

"Some people have gone back to their home country, so less recruitment in the area"
Café, North

"It has affected staff. We had a lot of European staff, Spanish and Italian, but we don't have them now."
Restaurant, South East

"I am losing my Polish staff – they are returning home"
Serviced accommodation, Mid

"We hire a lot of Eastern Europeans and they're harder to employ now"
Serviced accommodation, North

"I'm finding it harder to get staff – big time"
Hostel, South West

"English people are unskilled in the hospitality arena. Europeans are the back bone of the catering and front of house. It's hard to get qualified and quality staff."
Serviced accommodation, North

"Brexit for staffing has been a disaster. The devaluation of the pound mixed with uncertainty for base skill work force has led to many workers heading back to Europe. Britain does not need a specialised work force. The improvements in the service industry have been as a result of the excellent European work force."
Serviced accommodation, South East

- 8.5 Others say their staffing levels have not been affected by Brexit, and they continue to hire staff from Europe.

"We employ 10 to 12 overseas staff every year, and it's never a problem. We have more coming and returners."
Serviced accommodation, South West

"At the beginning we were worried. We have staff from Lithuania, Italy and Spain. But so far there has been no impact."
Serviced accommodation, Mid

Future staffing fears

- 8.6 Others speak of their concerns for the future, uncertain about how the Brexit decision will affect their staff in the longer term.

"Not yet but it might affect us soon, depending on how difficult it will be for people to work in the UK after Brexit"
Restaurant, South East

"Not yet but all our staff are Hungarian so problems might occur in the future"
Serviced accommodation, North

- 8.7 Operators who rely on European funding say that if the extra money does not come from elsewhere in the future, they will struggle to hire the staffing levels they have become accustomed to.

"The loss of European funding will have an impact because that was used for staff"
Activity operator, South West

"It could impact on staffing in the future if funding decreases because of Brexit"
Attraction, South East

The future is uncertain

- 8.8 As well as staff, there remains a huge amount of uncertainty over the impact Brexit will have on other areas of business. The majority of operators say that they don't know how it will affect their business.

"You can't predict the future. I have no idea what's going to happen."
Self catering, Mid

"I don't know. Nobody is sure what's going to happen."
Attraction, South East

"I'm sitting on the fence – concerned it may affect us but don't know as yet."
Attraction, Mid

Rising costs of goods

- 8.9 Some operators predict that the cost of goods will increase once Britain leaves the EU. This will have an impact on their profit margins, or force them to raise the cost of their offering to customers.

"Brexit may have an impact on our prices. Some of our suppliers and materials are sourced from overseas and there had already been an increase on shipping costs."
Attraction, South East

"It's impacting in a small way already, for example on the cost of food & drink. We've had to change the wine list as French wine is too expensive to use as our house wine."
Serviced accommodation, Mid

"We do sell products that come from abroad so we might have to pay a lot more on imports"
Activity operator, North

Lower-value sterling is a double-edged sword

8.10 The currency fluctuations between the Euro and Sterling associated with Brexit bring both hope and concerns.

8.11 A lower-value Sterling would make Wales more attractive to those in the EU and beyond, as a holiday or short break in the country is more cost-effective than it has been. This could bring an increase in overseas visitors.

"It affects the level of the pound, which will make more European visitors stay in the UK"

Self catering, South West

"It depends on exchange rates. A weak pound attracts European visitors who may have not travelled to UK normally."

Caravan park, North

"Exchange rate in their favour so overseas visitors should be showing up but we haven't seen any more business"

Service accommodation, South West

"I think it should be a positive impact as the pound exchange rate is better for overseas visitors"

Serviced accommodation, South East

8.12 It may also mean that holidaying abroad becomes too expensive for Brits, who then opt for a less expensive break in the UK.

"Can't see it making any difference but if it did, it would probably help business as people would be choosing to stay in the UK for holidays"

Self catering, South West

"I think it'll be positive – more staycations as Europe will become more expensive, I think"

Serviced accommodation, North

8.13 However, with the possibility of less disposable income, even spending time in Wales as a visitor may be too expensive, with predictions of fewer or shorter breaks having an impact on the tourism industry.

"Brexit could possibly have a negative impact. British people may have less money and therefore are less likely to go on holiday."

Self catering, Mid

"I don't know but money is changing and everything is getting more expensive so it depends if people want to spend their money on holidays"

Serviced accommodation, South West

"I think British people have less money to spend and therefore are not having weekend breaks or going out for restaurant meals as often as they used to"

Serviced accommodation, Mid

"I think it depends on the disposable income and economy after Brexit. Holidays are probably the first thing you would cross off the list if you had to make cuts."

Caravan park, North

Fears over potential visa issues

8.14 Some operators worry that getting into Wales may become harder, should Europeans need a visa to enter Britain. They believe that this may put off potential visitors, who then opt for an 'easier' break elsewhere.

"Maybe if it becomes more difficult to get into the country – we get a lot of people coming from Belgium, France, Netherlands coming but they may decide to go elsewhere because of visas and the complications of getting visas"

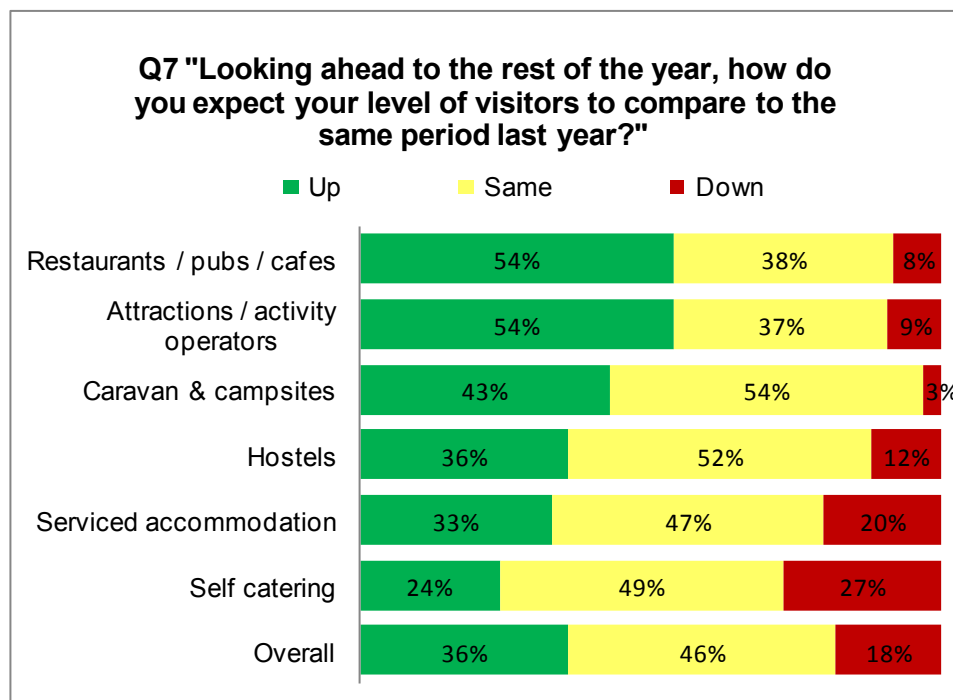
Hostel, South West

"It depends on the rules – if people require any visas, it may affect visitors from abroad"

Serviced accommodation, South East

9. EXPECTATIONS AND CONFIDENCE FOR 2018

EXPECTATIONS BY SECTOR



Base: 756

Positive expectations – especially among non-accommodation operators

- 9.1 In spite of a difficult start to the year, expectations for the rest of 2018 are quite positive, especially in the non-accommodation sectors.

"We've had a lot of enquiries so we're very confident"

Activity operator, South West

"It's improving year by year. We've invested more in activities, play areas, extended the car park and ... good marketing"

Attraction, South West

- 9.2 Some operators say they are putting a bad start to the year behind them and are looking forward to better business in the warmer summer months.

"It's been a difficult start to the year with snow, but we are looking ok for the rest of the year"

Hostel, South West

Expectations based on advance bookings

- 9.3 Many operators who have positive expectations about the rest of the year are speaking from a position of having the bookings already.

"We have plenty of future bookings"

Activity operator, North

"We are fully booked for the rest of the year apart from one week in August"

Self catering, South West

Some are relying on last minute bookings

- 9.4 Whereas some operators have numerous advance bookings to support their expectations, others are relying on last minute bookings, and some say the long term trend during their time in business is towards the last minute extreme.

"I am not worried. I am counting on last minute bookings."

Self catering, Mid

"When we started 14 years ago, all bookings were in advance. I think people are more cautious to book in advance these days because of money problems. Also internet sites offer cheap last minute deals."

Self catering, North

Higher expectations in South East Wales

- 9.5 About half (48%) of businesses in South East Wales expect to be up on last year. This compares to a third (33%) of businesses across the other regions of Wales.
- 9.6 Events in Cardiff play a part in the positive expectations of some operators.

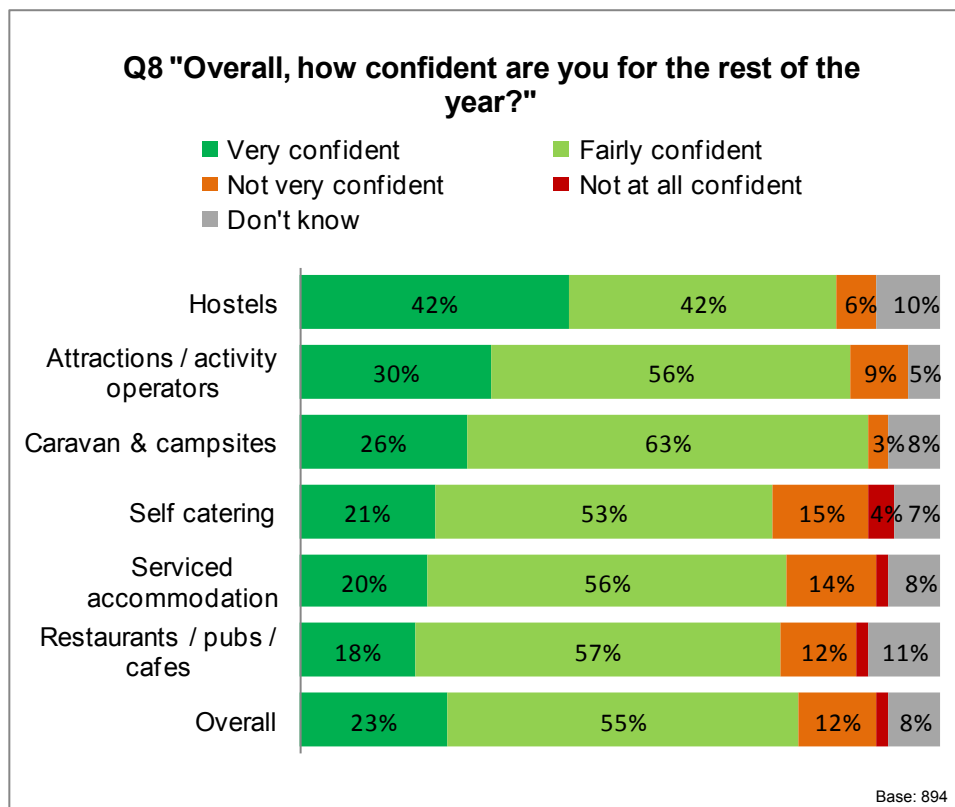
"I expect us to be much busier with events like Ed Sheeran and Beyoncé concerts, and the rugby autumn internationals"

Serviced, South East

"Events are strong in June and August"

Serviced, South East

CONFIDENCE BY SECTOR



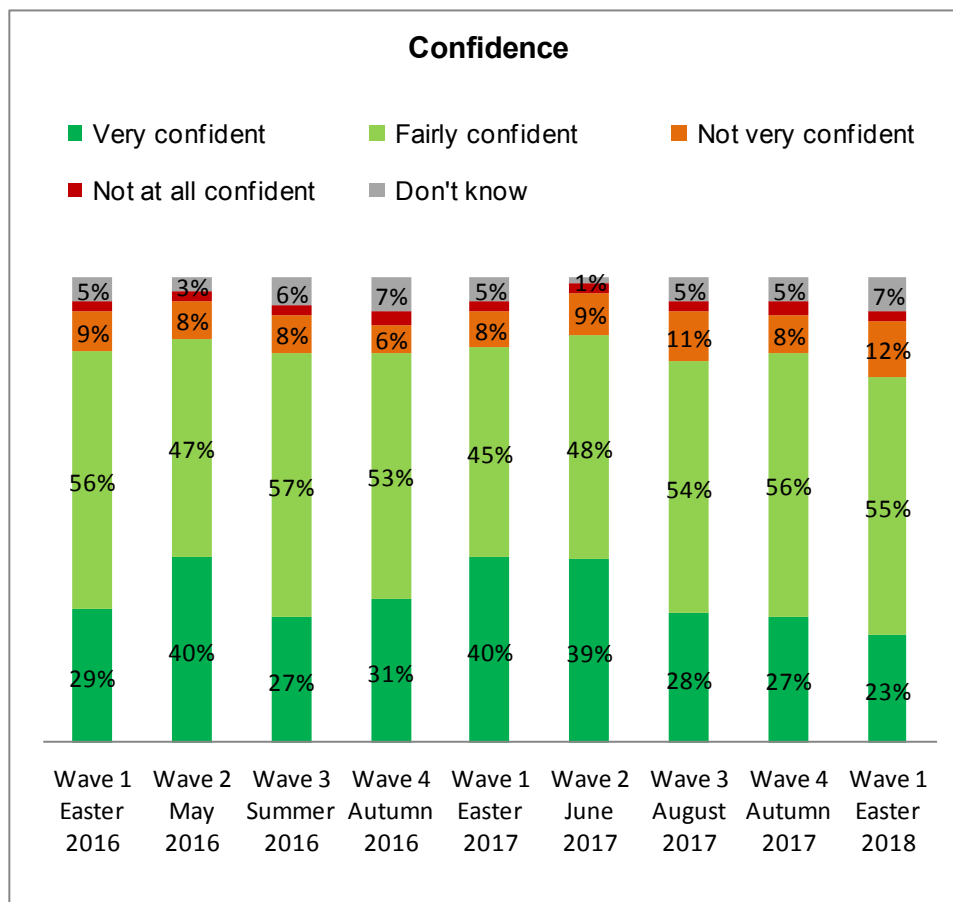
A time of year to look forward to

9.7 Most (78%) operators are confident about the rest of the year. Typically at this time of year, tourism operators look forward to the busier summer months, especially if the year has not started well.

"Nothing this year so far, but hopefully it will get better by the summer"
Self catering, South West

"The phone starts ringing as soon as the sun starts shining"
Activity operator, South West

CONFIDENCE TREND



Confidence normally a little higher at this time of year

9.8 Although confidence in the industry is fairly high, it is usually a little higher at this time of year. The disappointing Easter period may have knocked confidence for some, but this could quickly change if business picks up.

“The start of this season was not brilliant. I am hoping we can catch up.”
Caravan park, South West



Sector Which of the following best describes your business type?

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

Please note that the following questions refer to your tourist customers only, i.e. not locals

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

- Yes ☐
- No ☐

Q2 Compared with Easter last year, how many visitors have you had this Easter?

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

Q3 Why would you say you have had more visitors?

Tick all that apply

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

Please specify other reason(s)

Q4 Why would you say you have had fewer visitors?

Tick all that apply

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

Please specify other reason(s)

Q5 How does your overall profitability to date this year compare with the same period last year?

- Up on last year ☐
- About the same as last year..... ☐
- Down on last year..... ☐
- Don't know / prefer not to say..... ☐

Q6 Do you have any comments to make on the performance of your business to date this year?

Q7 Looking ahead to the rest of the year, how do you expect your level of visitors to compare to the same period last year?

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

Q8 Overall, how confident are you for the rest of the year?

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

Q9 *Do you have any comments to make on your expectations for the rest of the year?*

Q10 Up to this point, how far, if at all, has Brexit affected your visitor levels?

- It has been very positive..... ☐
- It has been slightly positive ☐
- It has had no effect..... ☐
- I has been slightly negative ☐
- It has been very negative ☐
- Don't know..... ☐

Q11 *How, if at all, has the Brexit decision impacted on staffing at your business?*

Q12 *What impact, if any, do you think Brexit will have on your business in the future?*

Q13 Is your business graded or accredited by Visit Wales?

- Yes..... ☐
- No ☐

Q14 *What is the name of your business?*

LA

In which local authority area is your business located?

If you have more than one site, please select the area of your main site

Blaenau Gwent	<input type="checkbox"/>
Bridgend	<input type="checkbox"/>
Caerphilly	<input type="checkbox"/>
Cardiff	<input type="checkbox"/>
Carmarthenshire.....	<input type="checkbox"/>
Ceredigion	<input type="checkbox"/>
Conwy.....	<input type="checkbox"/>
Denbighshire	<input type="checkbox"/>
Flintshire	<input type="checkbox"/>
Gwynedd	<input type="checkbox"/>
Isle of Anglesey	<input type="checkbox"/>
Merthyr Tydfil	<input type="checkbox"/>
Monmouthshire.....	<input type="checkbox"/>
Neath Port Talbot.....	<input type="checkbox"/>
Newport	<input type="checkbox"/>
Powys	<input type="checkbox"/>
Pembrokeshire	<input type="checkbox"/>
Rhondda Cynon Taf.....	<input type="checkbox"/>
Swansea.....	<input type="checkbox"/>
Torfaen.....	<input type="checkbox"/>
Vale of Glamorgan.....	<input type="checkbox"/>
Wrexham	<input type="checkbox"/>

Thank you for your time in giving feedback. Please now click on 'submit' below.