

Wales Tourism Business Barometer

Wave 1, Easter 2019

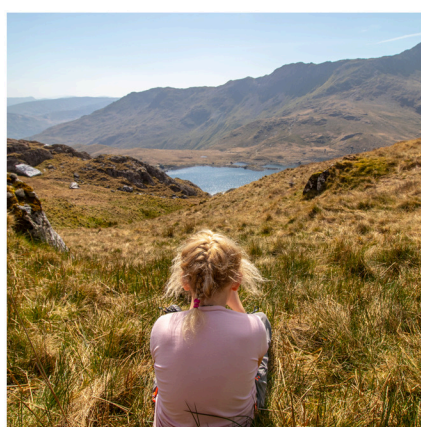


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Wales Tourism Business Barometer: Wave 1, Easter 2019

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

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Contents

| | |
|--|----|
| 1. Headline findings..... | 2 |
| 2. Background and methodology..... | 3 |
| 3. Easter performance..... | 4 |
| 4. Reasons for increased visitor levels | 7 |
| 5. Reasons for decreased visitor levels | 8 |
| 6. Profitability | 11 |
| 7. Seasonal spread of business by sector | 13 |
| 8. Seasonal spread of business by region | 14 |
| 9. Opening all year round | 15 |
| 10. Business closures | 16 |
| 11. Remaining open for longer | 18 |
| 12. Confidence for the summer | 20 |
| 13. Qualitative findings..... | 22 |

1. Headline findings

Late Easter and better weather attract visitors

- 1.1 Most (86%) businesses have increased or maintained their visitor levels this Easter. Among the 39% increasing their visitors, 'better weather' is the most common reason – cited by two thirds of these respondents. Many parts of Wales enjoyed glorious sunshine for the whole of the Easter weekend. The chance of having good weather was helped by Easter falling late this year – one third of those increasing their visitor numbers cite 'late Easter' as a positive factor.

All regions of Wales performing well

- 1.2 South West Wales has enjoyed a particularly good Easter, with 44% of businesses increasing their visitors. All regions of Wales are up on balance, for the main reasons of better weather and late Easter discussed above.

Sectors more able to capitalise on good weather at short notice have benefitted more

- 1.3 Sectors where visitors don't have to book far in advance or at all have performed particularly well, whereas the self catering sector, where bookings tend to be made further in advance, has been steady.
- 1.4 The attractions sector is up overall, but indoor attractions have been quieter because 'good' weather for everyone else is not necessarily 'good' for them.

High confidence for the summer

- 1.5 Following a fine Easter, the vast majority (85%) of operators are confident for the summer. A sunny Easter has led to the very weather-dependent caravan & camping sector feeling particularly optimistic – 97% of caravan & camping operators are confident for the summer.

Brexit impact on summer bookings

- 1.6 Open comments suggest that Brexit uncertainty is impacting on advance bookings for the summer – both in a positive and a negative way. Enquiries and bookings from Europeans are subdued, but the domestic market looks promising.

Most businesses provide their services all year round

- 1.7 Overall, most (77%) businesses are open all year round. Only in the weather-dependent caravan & campsite sector do the majority of businesses close at some point during the year.

2. Background and methodology

What is the Wales Tourism Business Barometer?

- 2.1 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.
- 2.2 This research wave relates to the Easter period in 2019, with measurements also of expectations for the summer.

How is the Survey conducted?

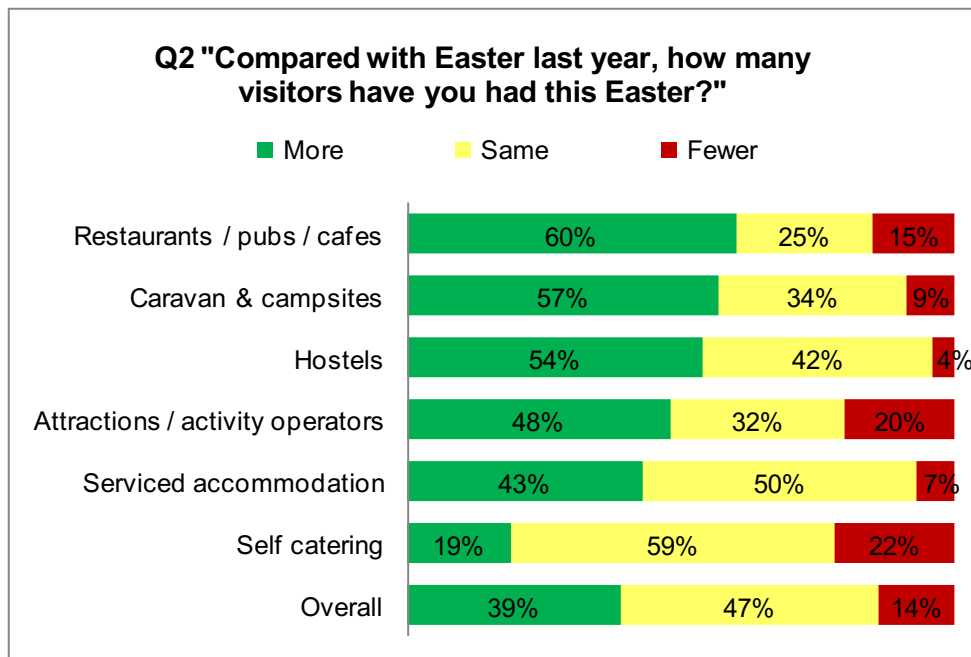
- 2.3 We have conducted 819 interviews by telephone. This makes results of questions asked to everyone accurate to $\pm 3.4\%$. The sample is reflective of the tourism industry in Wales and is shown below by sector and region:

| Sector / Region | North | Mid | South West | South East | Total |
|----------------------------|------------|------------|------------|------------|------------|
| Serviced accom | 103 | 44 | 75 | 55 | 277 |
| Self catering | 95 | 48 | 92 | 33 | 268 |
| Caravan / campsites | 41 | 10 | 21 | 5 | 77 |
| Hostels | 7 | 7 | 7 | 5 | 26 |
| Attractions | 30 | 12 | 19 | 24 | 85 |
| Activity operators | 14 | 7 | 13 | 5 | 39 |
| Restaurants / pubs / cafes | 8 | 13 | 8 | 18 | 47 |
| Total | 298 | 141 | 235 | 145 | 819 |

- 2.4 About three quarters (73%) of businesses in the sample are currently graded by Visit Wales, and 27% 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.
- 2.5 All telephone interviews have been conducted with business owners or managers in April. A copy of the questionnaire used is included as an appendix.

3. Easter performance

Performance by sector



Capitalising on the sunshine

- 3.1 Most (86%) businesses have increased or maintained their visitor levels this Easter. Sectors where visitors don't have to book far in advance or at all have performed particularly well. Restaurants / pubs / cafes included in this research are in areas of high tourism footfall, and they have benefited greatly from the sun coming out just at the right time for Easter weekend.

"We are very weather-dependent where we are situated"

Café, South West

- 3.2 Serviced accommodation is often booked spontaneously, whereas in the self catering sector, bookings tend to be made further in advance as stays tend to be longer. This might explain why this sector has been steady, when other sectors are significantly up.

"The weather helped us as we had a lot of one-nighters"

Serviced, North

"We call ourselves 'last minute booking caravan park'! This Easter we've sent people away as we've been so busy"

Caravan park, North

- 3.3 The attractions sector is up overall, but indoor attractions have been quieter because 'good' weather for everyone else is not necessarily 'good' for them.

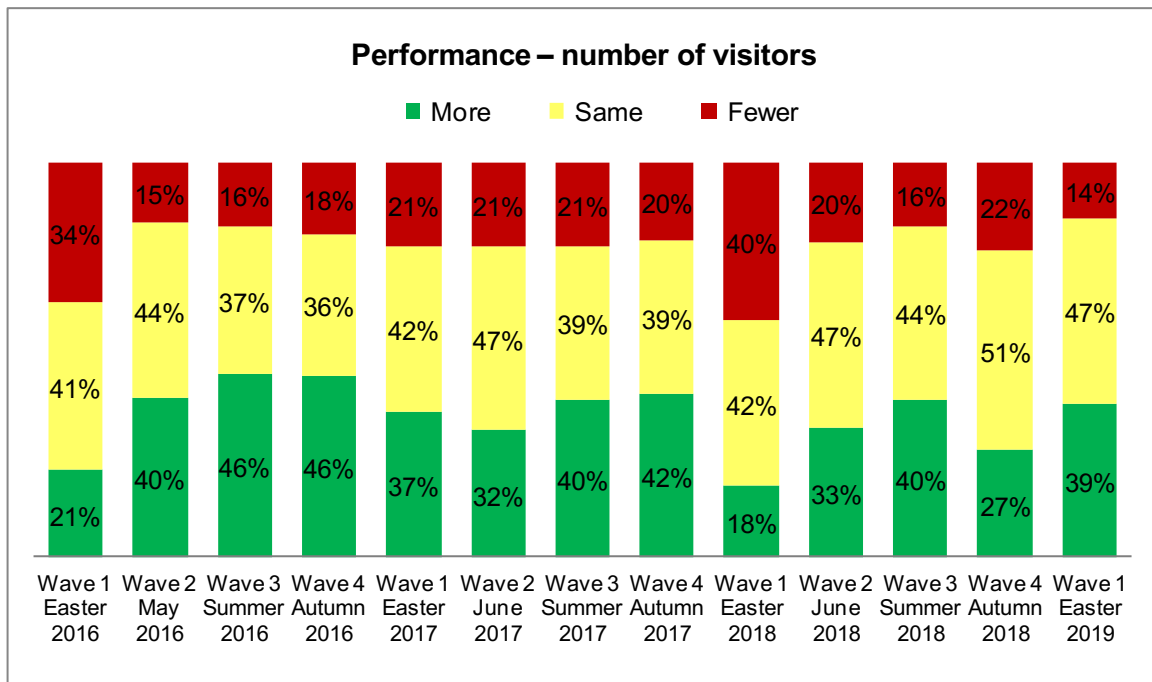
“The weather has been better so people are visiting the beach”

Attraction, South West

“If it’s too hot, people go to the beach instead and if it rains, they don’t come at all”

Attraction, South West

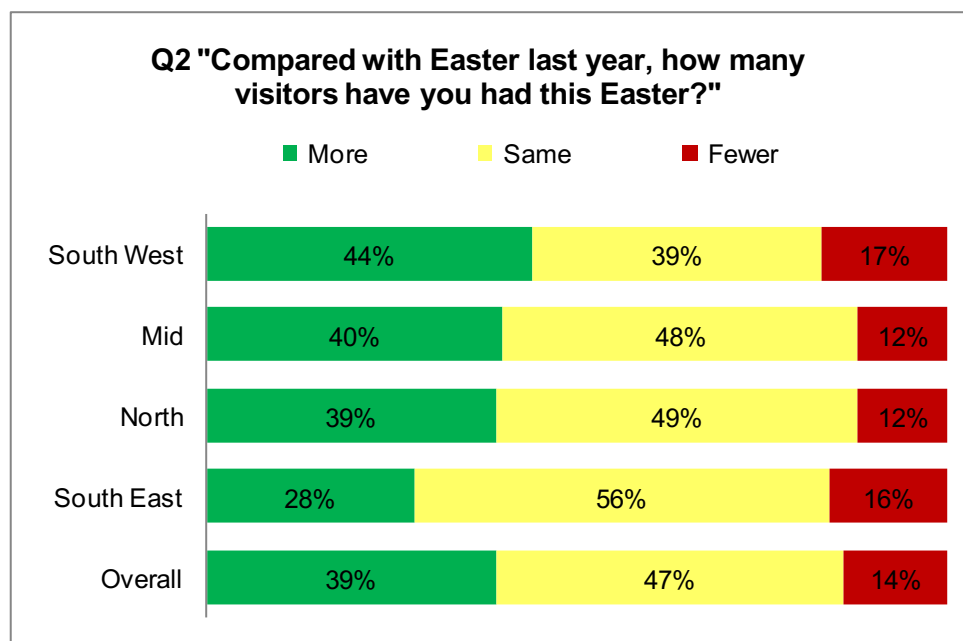
Performance trend



Very different Easter compared to last year

- 3.4 When seeing tourists out and about in the warm sunshine, it is hard to remember last year’s Easter, which was blighted by cold, rainy weather – in some places it even snowed. This year’s strong performance has given the industry a good start during a period which some consider to be the start of their season.

Performance by region



All regions of Wales performing well

- 3.5 The successful Easter period is seen across all regions of Wales, particularly in the South West, Mid and North.

"We are hitting all our targets"
Serviced, North

"We are feeling positive if Easter is a barometer"
Attraction, South West

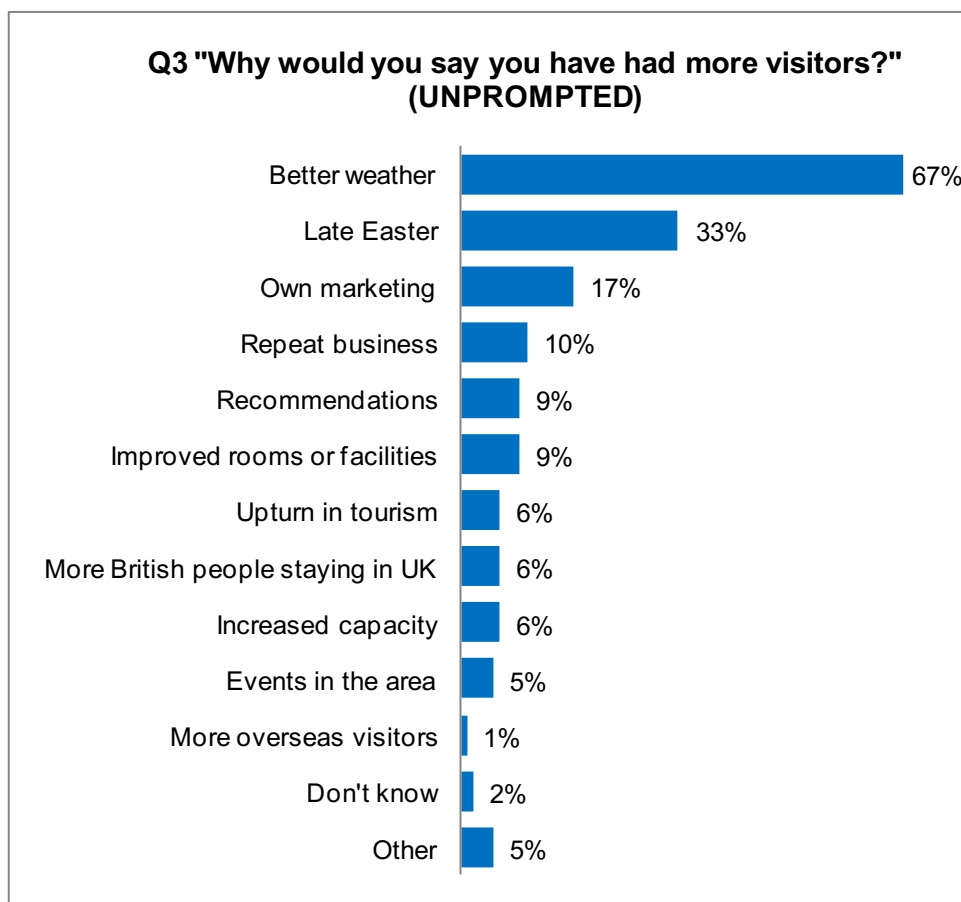
Effect of Severn Bridge tolls being removed

- 3.6 The Severn Bridge tolls were removed in December 2018, and some businesses in South Wales say they are seeing more visitors coming across into Wales instead of South West England.

"Since the removal of the tolls, we've seen a great deal more surfers from England coming to Porthcawl"
Restaurant, South East

"As a result of the removal of fees on the Severn Bridge, we've seen a 30% increase or so. People who otherwise would have gone to Devon surfing are now coming to Porthcawl."
Attraction, South East

4. Reasons for increased visitor levels

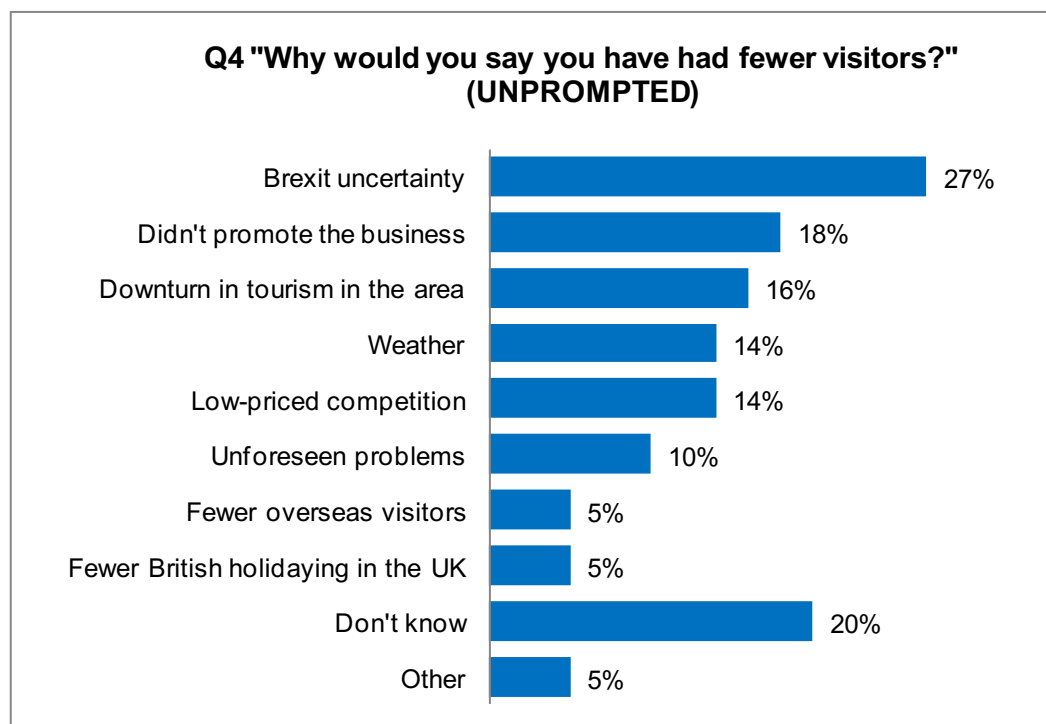


Late Easter and better weather

- 4.1 Among the 39% increasing their visitors, 'better weather' is the most common reason – cited by two thirds of these respondents. Many parts of Wales enjoyed glorious sunshine for the whole of the Easter weekend. The chance of having good weather was helped by Easter falling late this year – one third of those increasing their visitor numbers cite 'late Easter' as a positive factor.

"We absolutely smashed it this Easter as the weather was so good. We were so busy in the restaurant, and we were fully booked in the hotel as well."
Serviced, North

5. Reasons for decreased visitor levels



Brexit uncertainty

- 5.1 March and April were politically very turbulent months, with the UK's date for leaving the EU being extended last minute into April, and then a second time until later in the year.
- 5.2 The uncertainty has affected some tourism businesses. Some say that people held off making bookings while not knowing what was going to happen, and still don't know. Businesses relying on European visitors seem to have been affected more. We discuss this further in the next Section (*Performance by market*).

"We have seen a decline in European visitors. I think this is down to Brexit. It's psychological and totally irrational. Also due to Brexit, there's a trend of last minute bookings."

Serviced, North

"Bookings are really slow this year. I think people are hanging on because they don't know what's happening with Brexit."

Serviced, North

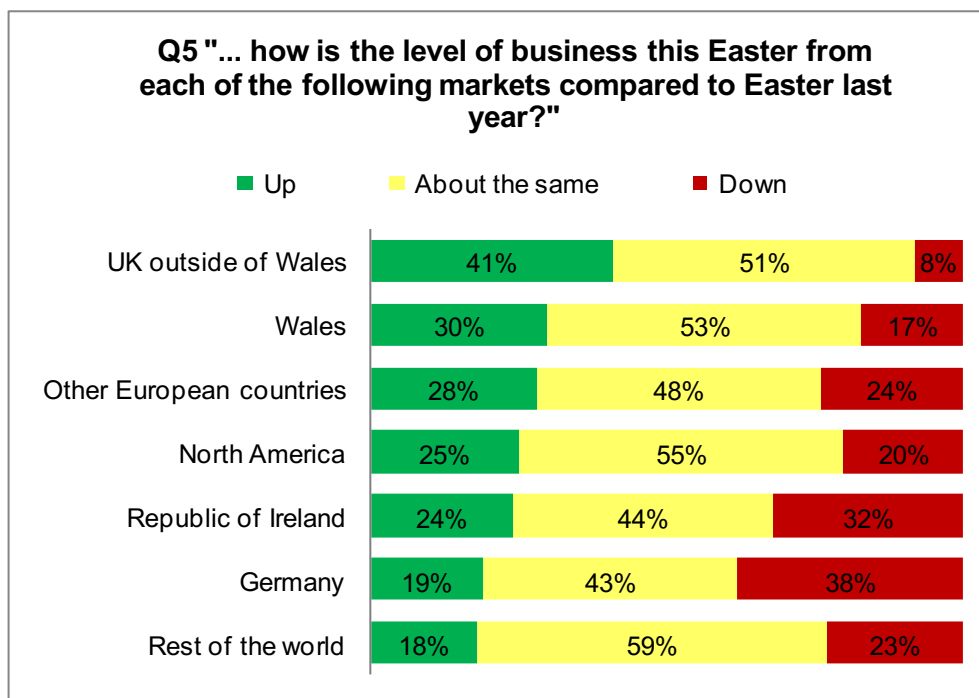
"Every time the Brexit date has been delayed, it has had an impact – fewer enquiries and bookings"

Self-catering, South East

"Brexit uncertainty killed business in March"

Activity provider, South West

Performance by market



UK market continues to perform well

- 5.3 The UK market (outside of Wales) continues to perform well. Given its importance to the Welsh tourism industry, this is very encouraging to see. This market is up for every sector and region of Wales.
- 5.4 Some operators say that Brexit uncertainty this year has discouraged people from holidaying abroad. Some credit is also given to Visit Wales for marketing to UK holidaymakers.

"We think that the Visit Wales advertising campaigns have been useful and show Wales in a great light. Their social media campaigns are well received."
Attraction, South West

"Brexit means that people are more careful with their money and are holidaying at home more"
Caravan park, North

German market is down

- 5.5 Experiences of European business seem to vary, but Germany is down. Operators say this is because of Brexit.

"Brexit has already had a significant impact on the business – fewer bookings from abroad"
Self-catering, South East

Mixed feedback on long haul markets

- 5.6 The North American and 'Rest of the world' markets seem fairly steady overall, with mixed feedback on whether these markets have increased or decreased.

"We're seeing a lot more Americans and Chinese. The Chinese tourists love coasteering, really wanting to get involved, but I find the majority can't swim."

Activity provider, South West

"Bookings from all over the world, mainly USA and Canada so far"

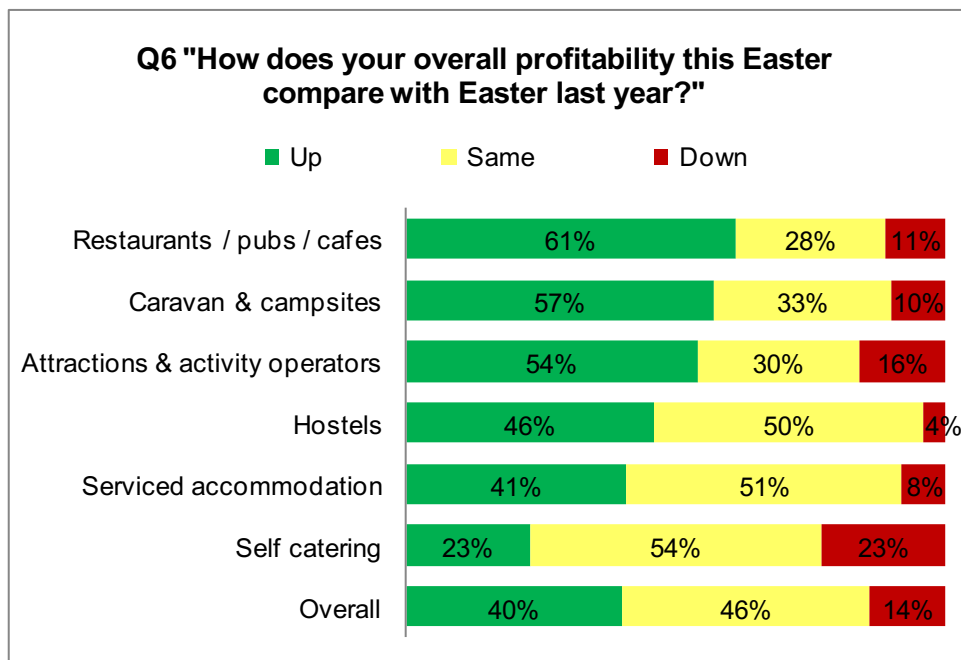
Serviced, Mid

- 5.7 There are some reports of the Australian market performing well. The launch of Qatar Airways flights to/from Cardiff Airport and Visit Wales' subsequent efforts to promote to the Asia Pacific region may have influenced this.

"Bookings are coming in from all over the world, including Australia"

Self-catering, Mid

6. Profitability



Very similar sector trend to visitor levels

- 6.1 Profitability levels this Easter vary by sector – in a similar way to how visitor volumes vary. Some attractions say they are noticing visitors spending less and put this down to Brexit uncertainty.

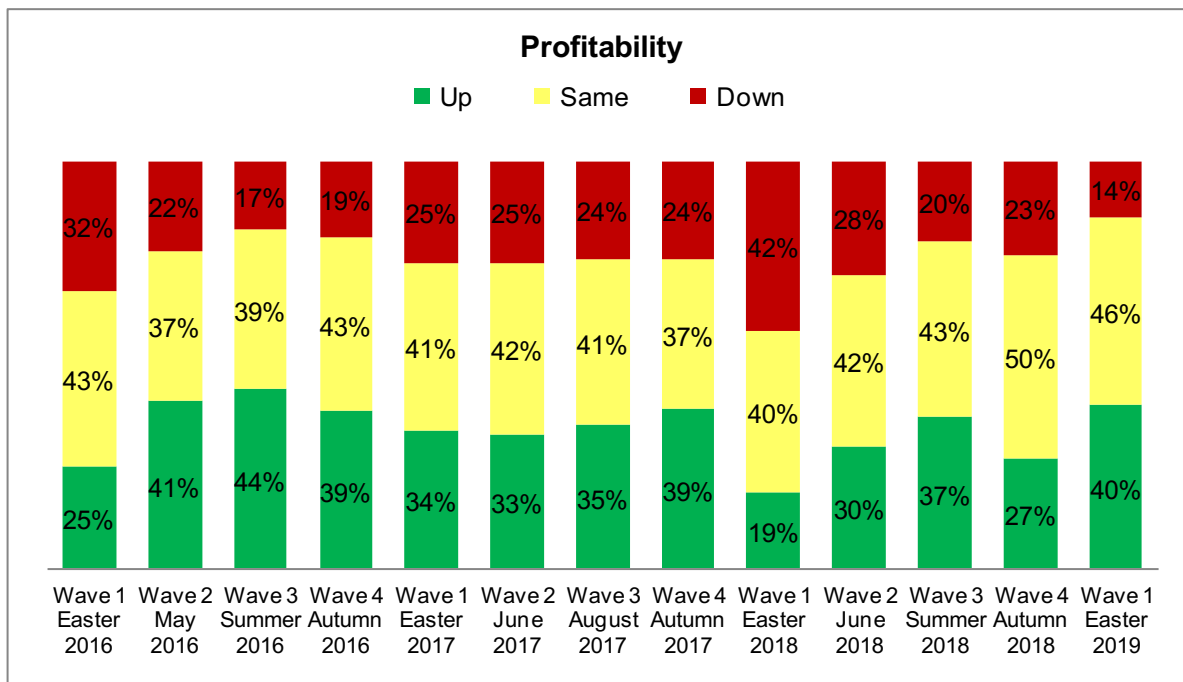
"Due to Brexit uncertainty, people aren't really spending as much. We are a gallery selling luxury items. People are waiting until they know what is happening with Brexit."

Attraction, South East

"With Brexit looming, people aren't spending anything like they were"

Attraction, South East

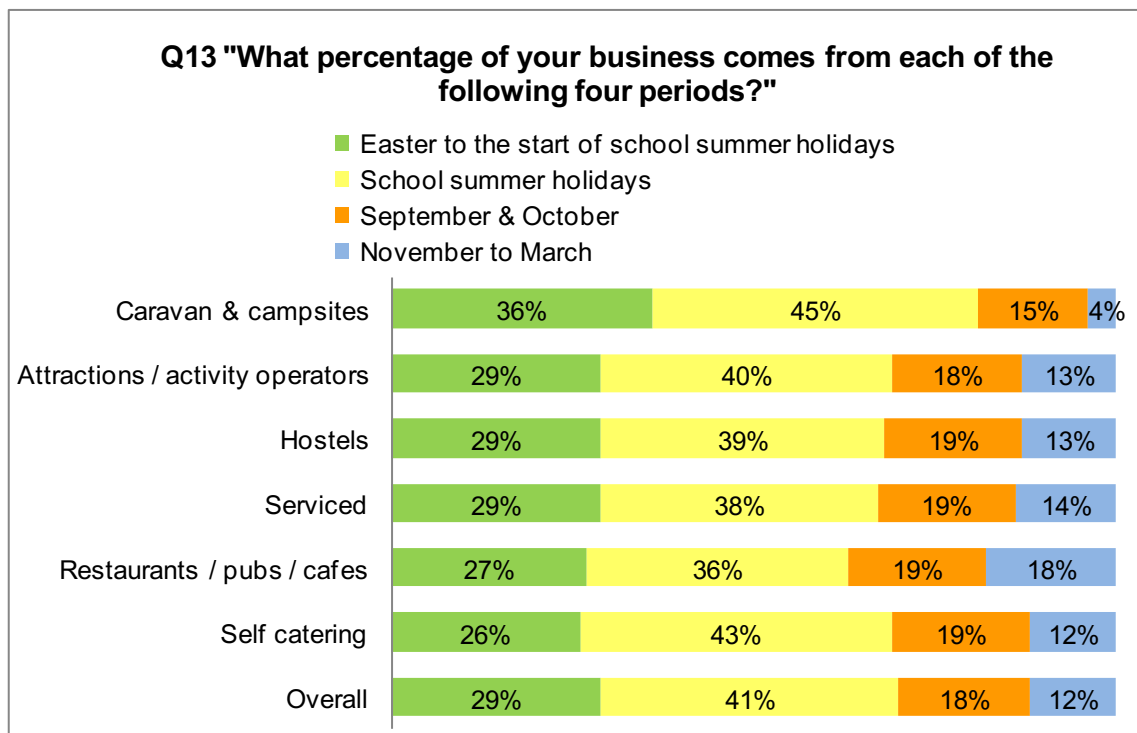
Profitability trends



Profitability trend closely mirrors visitor volume trend

- 6.2 Profitability trend suggests that increased visitor levels this Easter have not come at the expense of reducing prices. Some historical results (e.g. during recession) show that maintaining or increasing visitor levels can come at the expense of profitability.

7. Seasonal spread of business by sector



Base: 750

Current importance of the school summer holidays

7.1 The busiest period for the tourism sector is the school summer holidays over July and August. On average, operators say that two fifths (41%) of business comes from that summer period.

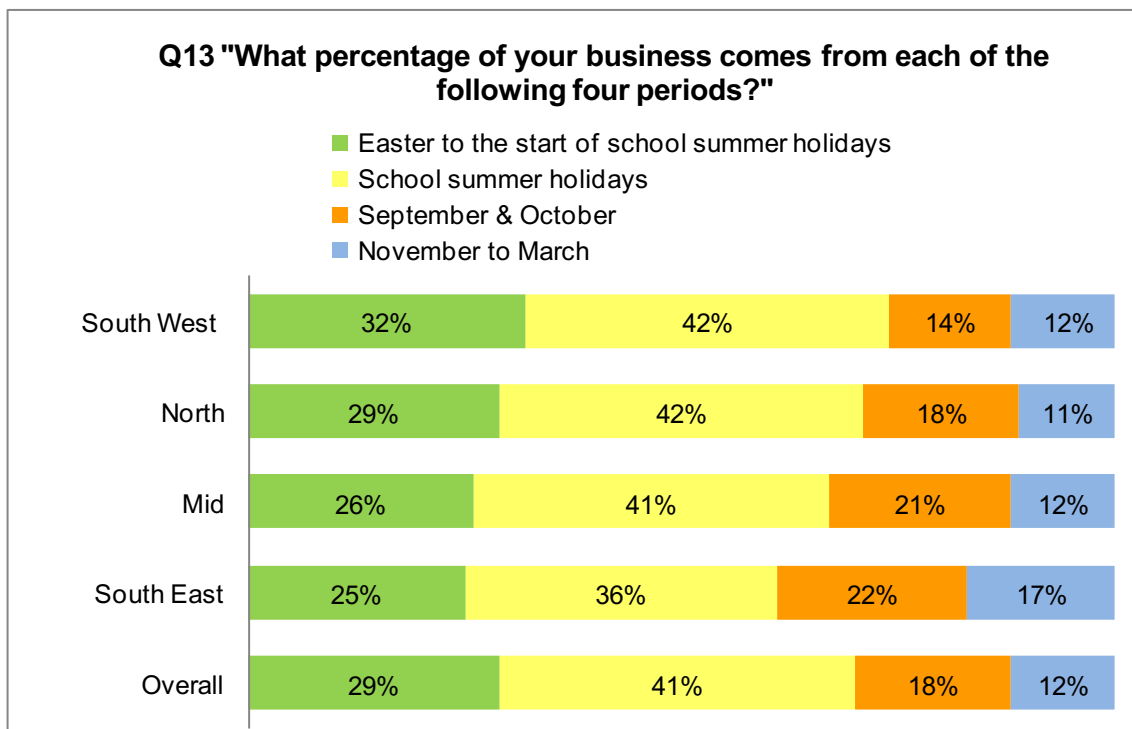
7.2 For caravan and campsites, Easter through to the end of the summer holidays is a crucial time for business, with most (81%) business coming during that time. Their performance is heavily dependent on the weather, which may be why business drops after the summer.

"We only open between April and August ... the weather tends to help."
Caravan & campsite, Mid

"For the Spring bank holiday and the second week of July we are fully booked. We're approximately 90% full during the peak of Summer."
Caravan & campsite, South West

7.3 Restaurants, pubs and cafes have a slightly more even spread of business throughout the year compared to some other sectors. Although based in areas of high tourism footfall, tourism is only part of their custom.

8. Seasonal spread of business by region



Base: 750

Slight variation by region

- 8.1 There is some variation by region in seasonal spread. The South East appears to have the most stability throughout the year, attracting a higher proportion of its business (17%) between November and March than other regions. This may be influenced by Cardiff playing host to a number of sporting events during the off-peak season, particularly the autumn rugby internationals and the Six Nations during February and March each year.

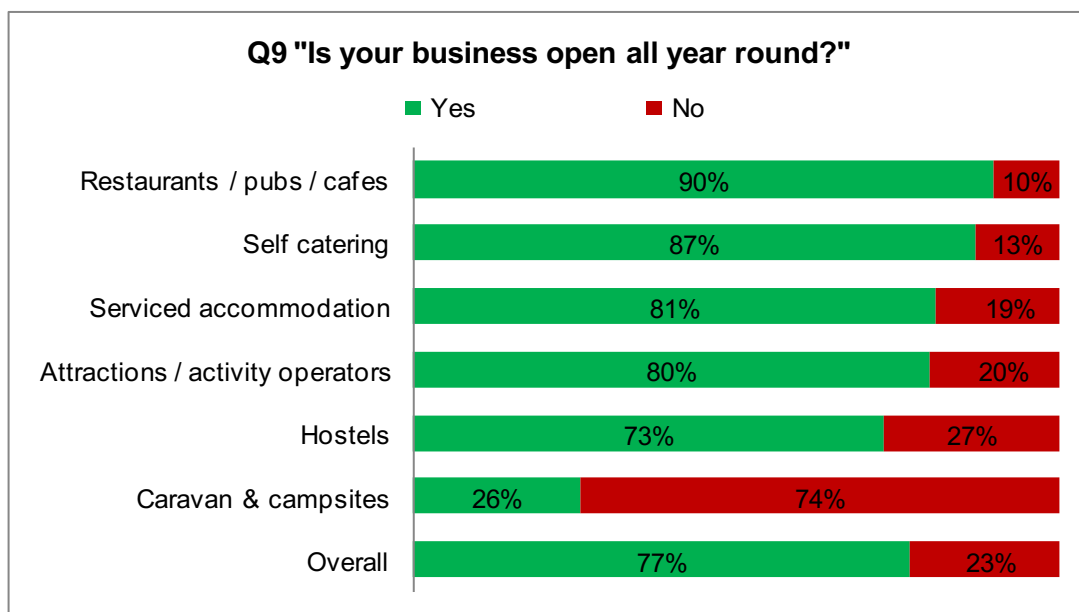
"We book out well in advance for events such as the rugby – we already have bookings for the Six Nations next year."

Serviced, South East

"Even though there were only two Six Nations games being played in Cardiff this year, we still did very well during the rugby."

Bar, South East

9. Opening all year round



Most businesses provide their services all year round

- 9.1 Overall, most (77%) businesses are open all year round. Only in the weather-dependent caravan and campsite sector do the majority of businesses close at some point during the year.
- 9.2 The vast majority (90%) of restaurants, pubs and cafes stay open all year round – these businesses are not solely dependent on tourists, as they will often cater to customers from their local areas.

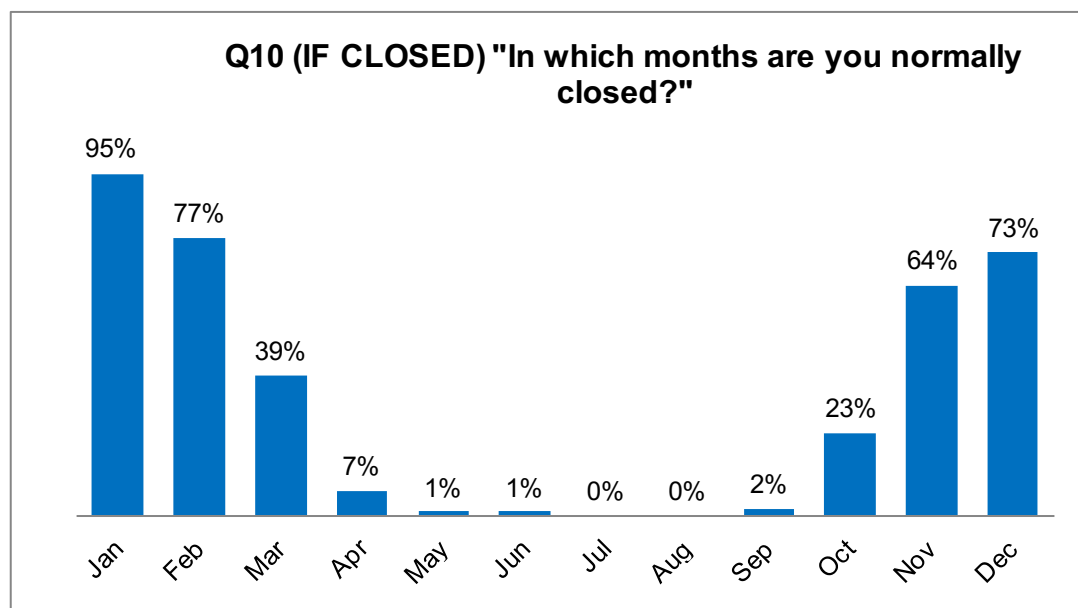
"We cater a lot to office workers on lunch breaks."

Café, South East

"We're next to an army barracks, so we always get a lot of local custom."

Public house, Mid

10. Business closures



Q10 was asked only to businesses not open all year round

Businesses closing for the winter

- 10.1 Of businesses which are not open all year round, most begin to wind down over the winter months. On average in the industry, only 12% of business occurs between November and March (shown in Section 9). Therefore some operators believe it is not financially viable to remain open.

"It's not cost-effective to stay open in December and January."
Serviced, North

"In the winter months, it doesn't make sense financially to stay open."
Attraction, Mid

"There is nobody about in the winter because it's cold and miserable."
Serviced, North

- 10.2 Just under a quarter (23%) of operators who close at some point start to close in October, with the number of closures almost tripling to 64% in November. This rapid increase possibly reflects businesses wanting to attract more visitors during the October half term before they close for the winter period.
- 10.3 More businesses appear to close after Christmas, with the vast majority (95%) of those who close at some point being closed in January. December appears to be a better month for business over winter with Christmas making for a busy few weeks.

"The Christmas holidays are very busy for us."

Serviced, South East

"Christmas is a good time of year for us."

Attraction, South West

"Most of our weddings are in December – it's the best month of the year."

Serviced, South East

Summer months mean good business

- 10.4 Only 1% of businesses not open all year round are closed during May and June, but no businesses close over July and August in the midst of the summer holidays. Overall in the industry, operators report that two fifths (41%) of their business comes from the summer months.

"The summer season is the most important season for the business."

Self catering, Mid

- 10.5 As a result of this increase in demand, many businesses receive their bookings for the summer in advance. Several operators reveal they are already fully booked for the summer season this year.

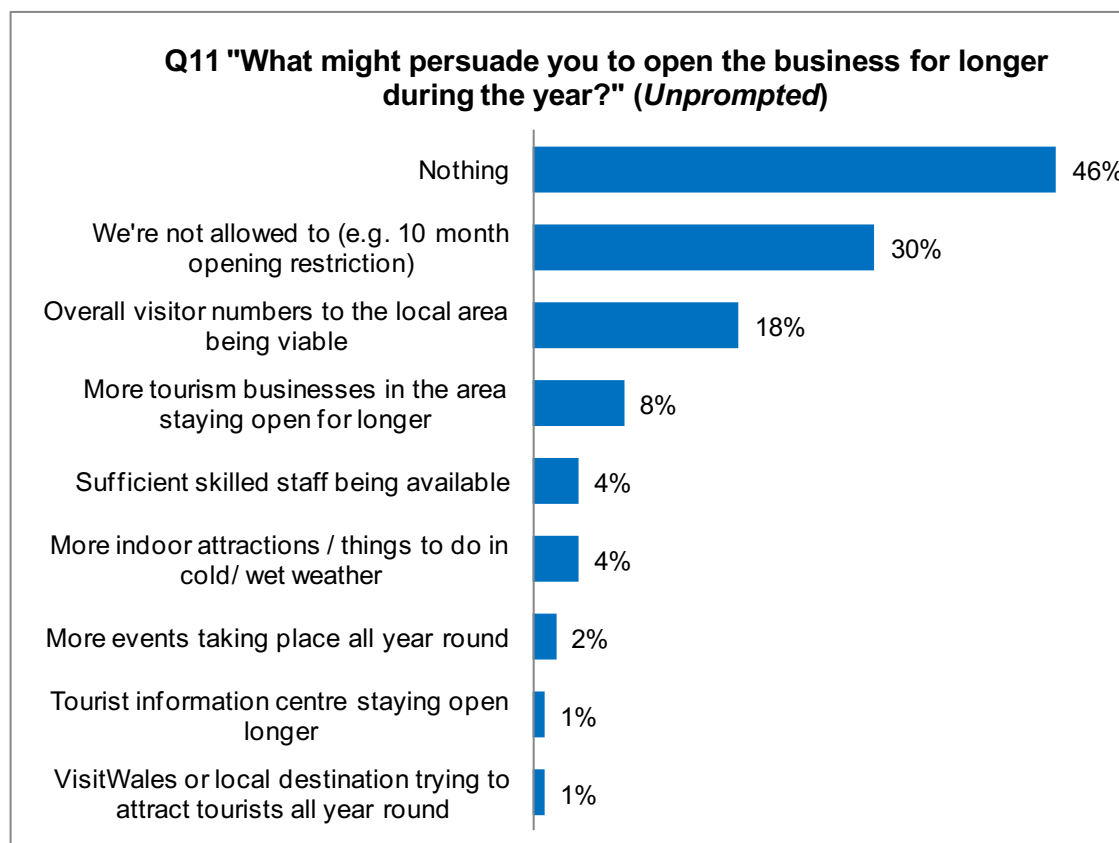
"We get our summer bookings six months in advance."

Activity operator, South East

"We are at 80% capacity booked for the summer already."

Serviced, North

11. Remaining open for longer



Q11 was asked only to businesses not open all year round

Staying open for longer isn't an attractive option for many

11.1 Just under half (46%) of operators not open all year round say nothing would persuade them to stay open for longer. Open comments reveal that businesses use the off-peak season to do things they might not be able to during the midst of the busy summer season. This includes maintenance work, renovations, or annual leave periods for staff / owners.

"We take our holidays and we do a lot of work on the hotel"
Serviced, North

"It's our rest period"
Serviced, North

"We renovate the campsite to get it ready for the coming season"
Campsite, North

11.2 Caravan and campsites, outdoor attractions and activity providers are heavily dependent on the weather. The wet and cold winters may deter businesses from staying open any longer.

"Too cold and miserable"
Café, Mid

"We can't because of the river"

Activity provider, Mid

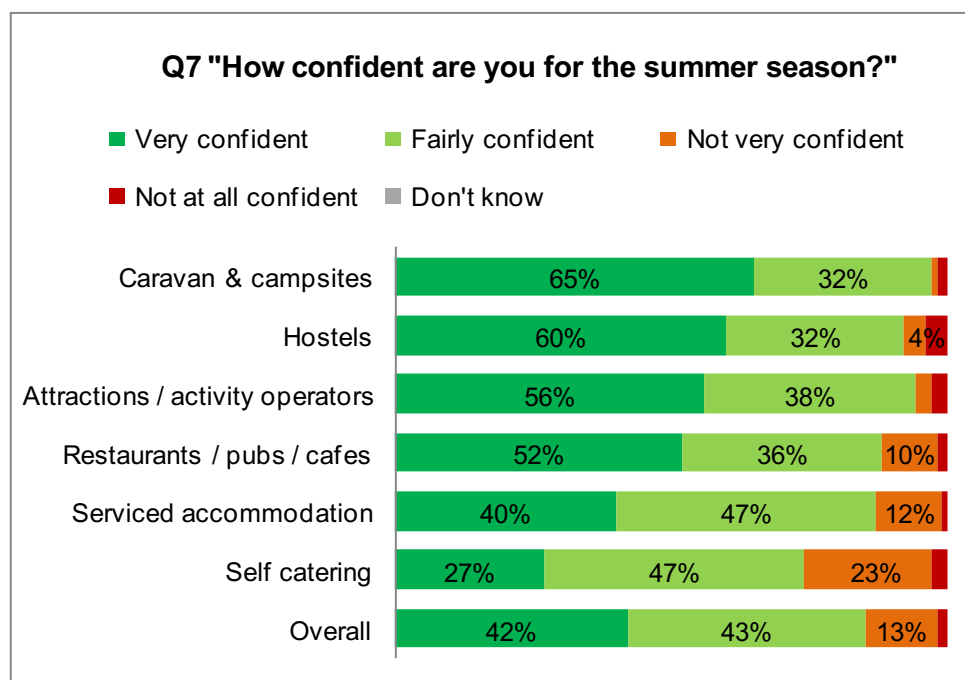
- 11.3 Three in ten (30%) operators say they cannot open longer during the year because of an opening restriction, so their operational period is out of their control.

"Conservation"

Attraction, North

12. Confidence for the summer

Confidence by sector



Base: 785

Current performance influences confidence for the next season

- 12.1 Overall confidence for the summer is high, although this varies by sector, shown above. Level of confidence for the summer correlates quite closely with Easter performance. This is partly due to seeing high levels of bookings continue into the summer, and partly because a sunny Easter gives speculation to a sunny summer.

"We're approximately 90% full during the peak of summer"
Caravan park, South West

"We hope for last minute bookings like every summer because people wait to see if the weather is nice before booking"
Serviced, North

"Lots of advance bookings – we are arrogantly confident"
Serviced, North

Domestic consumers are booking, but overseas in decline

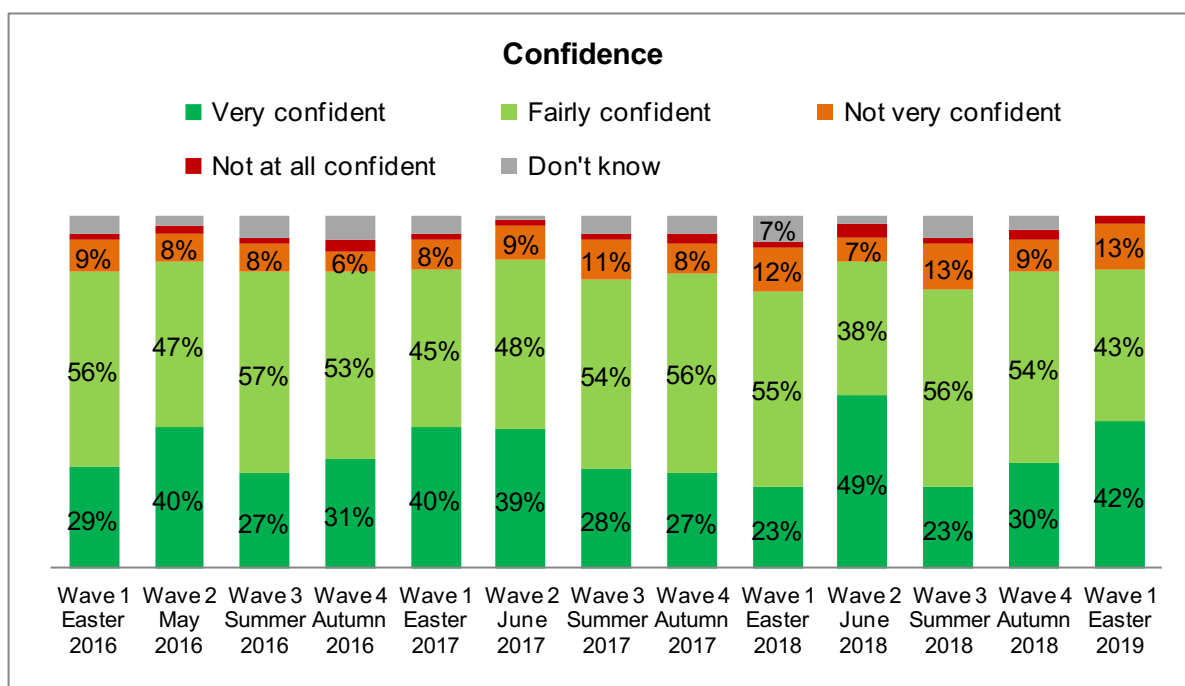
- 12.2 A common theme in the open comments is that UK consumers are booking, but enquiries / bookings from overseas (especially Europeans) are noticeably lacking for this summer. Brexit is believed to be the main reason for both trends.

“Some bookings for the summer, but only from UK visitors rather than from abroad”
 Serviced, South East

“We expect fewer visitors this summer, especially from Europe because of Brexit”
 Serviced, South East

“A lot of bookings already for the summer, but not from abroad. This could be related to Brexit.”
 Self-catering, South East

Confidence trend



Confidence as expected following a good Easter

12.3 When Easter performance is mediocre, confidence going forwards is subdued, but when performance is good, confidence for the summer is high. Easter 2019 continues this trend.

13. Qualitative findings

- 13.1 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.

Performance over easter & the start of the year

A mixed start to the year for some...

- 13.2 Stakeholders have seen a mixed start to the year in terms of reports they have received from their members.
- 13.3 Some providers in the north have experienced a slow start to the year, but this should not reflect the rest of the year.

“Some people in the area have been worried because of a slower start to the year ... [but] just because it’s started slow, it doesn’t mean it’s going to be slow all year.”

- 13.4 Another stakeholder reports that performance over January and February was better than expected, but occupancy has been down in March and April. There seem to be mixed responses from larger and smaller businesses, with the latter facing some difficulty.

“Overall it’s not so busy. Some of the bigger agencies are getting more enquiries within Wales than anywhere else in the UK. But I’m getting mixed messages from those smaller businesses – it could be to do with their marketing.”

... but Easter has gone down a real treat

- 13.5 The Easter weekend seems to have been enjoyed by everyone in the tourism industry. Stakeholders believe that a later Easter has helped to increase overall visitor figures.

“Easter being later in the year makes a difference ... people have had time to recover from Christmas financially – another month’s pay makes all the difference.”

“When Easter is later in the year, generally the weather is a little warmer.”

- 13.6 Additionally, stakeholders take advantage of the differences in Easter school holiday dates across Wales and England, because it extends the Easter period.

“Because of the Easter holidays being quite stretched out and the crossover with the Easter holidays across the border in England is different, it’s actually spread out over 3 to 4 weeks.”

- 13.7 The warm weather over the Easter weekend has certainly played an important part in encouraging people to enjoy the outdoors, which attractions and activity providers have largely benefitted from.

“There were plenty of visitors over the Easter weekend.”

“The weather makes a huge difference and it encourages people to get out and do things ... warmer air temperature enables people to get out and do those water activities or walking activities.”

“The weather is one of the main factors with regards to how well we do across Easter, and the 4 days of Easter have been really good!”

Seasonality

Those who stay open adapt to market needs

- 13.8 Business owners may decide to adapt their offerings during the shoulder months of the year to meet the demand that's available, whether from tourism or not.

“We tend to be open all year round, but I only open to regulars or to contractors doing work in the area.”

“There are providers who still have the offer to do things in those closed periods, but they realise there's a big chance they won't get too much in the way of business, so they have to provide a limited offer.”

“A couple of the sites have a small local audience, so they're only open at the weekend during the winter.”

“It's not possible to have everything open all the time, but with larger sites there will be something open, like the café or the shop.”

Smaller businesses tend to see fewer visitors during winter

- 13.9 As seen in the quantitative findings, stakeholders indicate that smaller businesses tend to close over the winter season because they do not attract as many visitors. They indicate that it may not be financially feasible for some businesses to stay open during the off-peak season.

“Some water activity providers do not choose to do those activities when it gets colder, because a drop in the temperature becomes a bit of a challenge for most people. With the numbers dropping off, it may not be financially viable to keep going through that winter period.”

“A lot of the time, they close because they don't get as many visitors. Also, some of them are very rural, so they're more reliant on the tourist industry. In the winter months, it wouldn't make sense financially to stay open.”

Owners need time off occasionally

13.10 Also as per the quantitative findings, stakeholders confirm that some business owners in the tourism industry take advantage of a downturn during winter to do maintenance work or refurbishments, which they may not have the time for during the busier periods of the year. Leaving the maintenance work until quieter periods means they will not lose out on business.

“It’s good to be able to do that full maintenance work and make sure everything is in working order, because there’s very little chance to check if you’re operational 24/7.”

“We have to be careful with the conservation side of things. Some of the properties are more sensitive than others, so they’re only partly open because of the conservation work they need to do over the winter.”

“During the closed period, members will make sure their maintenance work is done, that their kit is ready to go so that when they do open, they’re ready to kick things off straight away.”

“You need a bit of downtime, otherwise when are you supposed to do any maintenance you need to do? You can’t be redecorating if you’ve got guests, because that will affect their stay.”

13.11 In addition, some smaller businesses use the winter period to take time off, either for themselves or for their staff.

“A proportion of our members who do take a long break over winter tend to go on holiday themselves.”

“When you’ve got a small company with a small number of staff, during the summer they’re working very long hours, so they’d want some time off to relax and recover.”

A bright and prosperous season ahead

13.12 After a taste of summery weather over the Easter weekend, stakeholders are looking forward to what the summer season will bring. They are hopeful for more sunshine and high temperatures, which should encourage visitors to come to Wales.

“Seeing as we’ve had a good Easter and a good start to the year, usually that puts us in good shape for the rest of the year. At the minute we are 23% up on last year, so as long as the weather stays reasonable, it should be a good season.”

“I expect the weather to be good over the next few months, so I imagine we should do well.”

“I’m pretty confident as the weather looks to be on our side. The projected forecast for the next 7-8 weeks is supposed to be good, and that’s still early on in the year ... I’m very confident.”

Wales Tourism Business Barometer

Easter 2019

| Sector | Sector |
|--------|--|
| | Serviced accommodation <input type="checkbox"/> |
| | Self catering <input type="checkbox"/> |
| | Caravan / campsite..... <input type="checkbox"/> |
| | Hostel <input type="checkbox"/> |
| | Attraction..... <input type="checkbox"/> |
| | Activity operator <input type="checkbox"/> |
| | Restaurant / pub / cafe..... <input type="checkbox"/> |
| Q1 | Has your business been established for longer than 12 months? |
| | Yes..... <input type="checkbox"/> Go to Q2 |
| | No <input type="checkbox"/> Go to Q7 |
| Q2 | Compared with Easter last year, how many visitors have you had this Easter? |
| | More than last year <input type="checkbox"/> |
| | About the same as last year..... <input type="checkbox"/> |
| | Fewer than last year <input type="checkbox"/> |
| | Don't know <input type="checkbox"/> |
| Q3 | Why would you say you have had more visitors? (UNPROMPTED, TICK ALL THAT APPLY) |
| | Late Easter..... <input type="checkbox"/> |
| | Better weather <input type="checkbox"/> |
| | Own marketing..... <input type="checkbox"/> |
| | Repeat business <input type="checkbox"/> |
| | Economic recovery <input type="checkbox"/> |
| | Increased bookings through online agent (e.g. booking.com)..... <input type="checkbox"/> |
| | Signed up with new agency (self catering)..... <input type="checkbox"/> |
| | Recommendations..... <input type="checkbox"/> |
| | Upturn in tourism..... <input type="checkbox"/> |
| | Increased capacity..... <input type="checkbox"/> |
| | Events in the area <input type="checkbox"/> |
| | Improved rooms or facilities..... <input type="checkbox"/> |
| | More British people staying in the UK..... <input type="checkbox"/> |
| | More overseas visitors <input type="checkbox"/> |
| | Don't know <input type="checkbox"/> |
| | Other <input type="checkbox"/> |
| | Please specify other _____ |

Q4 Why would you say you have had fewer visitors? (UNPROMPTED, TICK ALL THAT APPLY)

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

Please specify other

Q5 Looking at the origin of your visitors, how is the level of business this Easter from each of the following markets compared to Easter last year?

| | Up on last year | About the same as last year | Down on last year | Don't know or not applicable |
|--------------------------|--------------------------|-----------------------------|--------------------------|------------------------------|
| | | year | | |
| Wales | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| UK outside of Wales | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Republic of Ireland | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Germany | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other European countries | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| North America | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Rest of the world | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q6 How does your overall profitability this Easter compare with Easter last year?

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

Q7 How confident are you for the summer season?

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

Q8 *Interviewer: record all useful comments on performance this Easter, particular markets or confidence for the summer.*

Q9 Is your business open all year round?

If they are open almost all year round with a few exceptions, e.g. closed for a few days over Christmas, tick 'yes'

Yes..... ☐
No ☐

Q10 (IF NOT OPEN ALL YEAR ROUND, AND ESTABLISHED LONGER THAN 12 MONTHS)

In which months are you normally closed?

| | | | |
|----------------|--------------------------|-----------------|--------------------------|
| January | <input type="checkbox"/> | July | <input type="checkbox"/> |
| February | <input type="checkbox"/> | August | <input type="checkbox"/> |
| March | <input type="checkbox"/> | September | <input type="checkbox"/> |
| April | <input type="checkbox"/> | October | <input type="checkbox"/> |
| May | <input type="checkbox"/> | November | <input type="checkbox"/> |
| June | <input type="checkbox"/> | December | <input type="checkbox"/> |

Q11 (IF NOT OPEN ALL YEAR ROUND, AND ESTABLISHED LONGER THAN 12 MONTHS)

What might persuade you to open the business for longer during the year? (*Unprompted, tick all that apply*)

Overall visitor numbers to the local area being viable..... ☐
More tourism businesses in the local area staying open for longer..... ☐
Tourist information centre staying open for longer ☐
Sufficient skilled staff being available outside of peak season ☐
Promotion to non-holiday markets - e.g. business events / tourism ☐
If we could see Visit Wales or more local destination trying to attract tourists all year round..... ☐
More indoor attractions / things to do in cold/wet weather ☐
More events taking place all year round in my area ☐
We're not allowed to (e.g. 10 month opening restriction)..... ☐
Nothing ☐
Other ☐

Please specify other

Q12 (IF NOTHING)

Why would nothing persuade you to open for longer?

Q13 (ALL)

Roughly what percentage of your business comes from each of the following four periods?

| | |
|--|-------|
| Easter up to the start of school summer holidays | _____ |
| School summer holidays | _____ |
| September & October | _____ |
| November to March | _____ |

Q14

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

Yes..... ☐

No ☐