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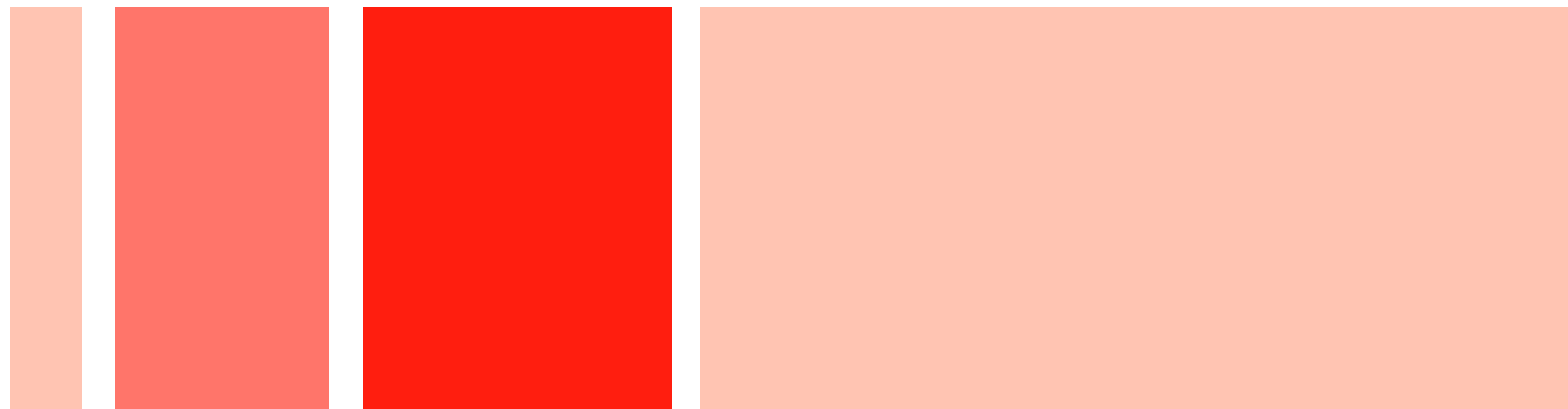
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# Wales Tourism Business Survey Wave 2, 2013



**Wales Tourism Business Survey – Wave 2, 2013**  
**Research on behalf of Visit Wales**

**Sarah McDonough, Beaufort Research Ltd.**

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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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## KEY FINDINGS

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### Business Confidence

- Just over a third (34%) of all businesses established longer than 12 months had received more guests/visitors this May compared to last May, although a similar proportion (35%) reported receiving fewer. Just over a quarter said they had received about the same amount (28%) – guest/visitor numbers showed the greatest increase for serviced accommodation (44%) and the smallest increase for self-catering accommodation (21%).
- For businesses receiving more guests/visitors this year, better weather (23%), marketing efforts (11%) and events in the area (10%) were felt to have contributed to the increase in numbers. On the other hand, for those businesses that had received fewer guests/visitors, the poor weather (53%) and the economic climate (47%) were felt to be the main causes of this.
- Closely linked to guest/visitor numbers, a third of the businesses reported a higher turnover this May compared to last May (35%), although roughly the same proportion reported a lower turnover (33%). A further quarter said that turnover this year was the same (26%).
- Most businesses were confident about the upcoming summer season (73%), with 25% very confident and 48% fairly confident. However, a sizable minority of nearly a quarter (23%) were not confident for the summer.

### Local Sourcing

- The vast majority of businesses (91%) felt that it was important that they sourced local goods and services, with 63% saying this was very important and 28% fairly important – businesses located in North Wales were most likely to consider this to be very important (73%). Only 7% did not think that this was important to their business.
- Reasons given for considering locally sourced goods and services to be important included boosting the local economy, proving positive with their customers and reducing their impact on the environment. Most of those who did not think that this was important claimed it was not relevant to their business because they did not provide products to their guests/visitors, although lower quality and higher price were also mentioned.

## Sustainability

- Over nine in ten businesses (95%) felt it was important that they operated in an environmentally friendly manner, with almost two thirds considering it to be very important (63%). Attractions and those businesses located in the South East were most likely to say that being environmentally friendly was very important (77% and 73% respectively).
- Virtually all businesses (99%) were practicing at least one environmentally friendly measure (average of four from the eight listed). By far the most popular measure was recycling (97%), followed by reducing waste (73%) and energy conservation (72%).
- Around two thirds of the businesses practicing environmentally friendly measures (62%) had used sources of guidance or support to develop the sustainability of their business – the most frequently used sources were Visit Wales (34%) and their Local Authorities (29%).
- Around seven in ten accommodation businesses (71%) and six in ten attractions (58%) were communicating their environmentally friendly measures (where applicable) to their guests/visitors. Accommodation providers were more likely to be promoting these through printed marketing literature (50%) while attractions were more likely to use their website (46%).
- Only a small proportion of these businesses had any specific environmental accreditations or certificates (17%) – the most frequently mentioned accreditation was the Green Dragon Award (37%).
- Most businesses felt that there were barriers to their business implementing environmentally friendly measures (71%) – by far the main barrier was cost (40%).

## Public Transport

- Levels of awareness of public transport services, routes and timetables were high amongst businesses – 89% were aware of the services in their area, 84% of routes and 77% of timetables.
- The majority of businesses provided information and encouragement to their guests/visitors in relation to public transport (76%). Two thirds made timetables available at their premises (66%), two in five (39%) promoted local transport options in their marketing literature and 30% on their website. While 33% actively encouraged their guests/visitors to use public transport during their stay, only 9% provided any incentive to do so.

## 1. INTRODUCTION AND OBJECTIVES

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

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

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

The subject areas covered in Wave 2 of the Business Tourism 2013 survey are:



### **Business confidence**

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



### **Local Sourcing**

*Perceived importance of using local providers of products and services, and the reasons behind this*



### **Sustainability**

*Perceived importance of operating in an environmentally friendly way, current 'green' business practices, communicating these practices to guests/visitors and barriers to implementing environmentally friendly measures*



### **Public Transport**

*Awareness of public transport and communicating public transport information to guests/visitors*

This report contains the main findings arising from the survey.

## 2. METHODOLOGY

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The survey was conducted via telephone using CATI (Computer Assisted Telephone Interviewing) technology from the Beaufort Research dedicated interviewing unit. Interviews took around 5 – 6 minutes to complete and all respondents were offered the choice of conducting the interview in the language of their choice, English or Welsh. A total of 5% of the sample undertook the interview in Welsh; take-up of this option was highest in North Wales (10%), and lowest in South East Wales (0%).

A total of **405 interviews** were conducted, and fieldwork took place on 3<sup>rd</sup> and 4<sup>th</sup> June 2013. This report was produced pm Monday 10<sup>th</sup> June; the quick turnaround was due to the excellent response from the businesses that were eager and willing to take part.

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

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

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

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

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

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

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

**Table 1 – interviews achieved by business type and region**

Business Type	Region				TOTAL
	North	Mid	South West	South East	
Attractions	22	24	20	21	87
Accommodation – serviced	48	30	29	35	142
Accommodation – self-catering	50	25	38	20	133
Accommodation - caravans	11	12	15	5	43
<b>TOTAL</b>	<b>131</b>	<b>91</b>	<b>102</b>	<b>81</b>	<b>405</b>

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



### 3. MAIN FINDINGS

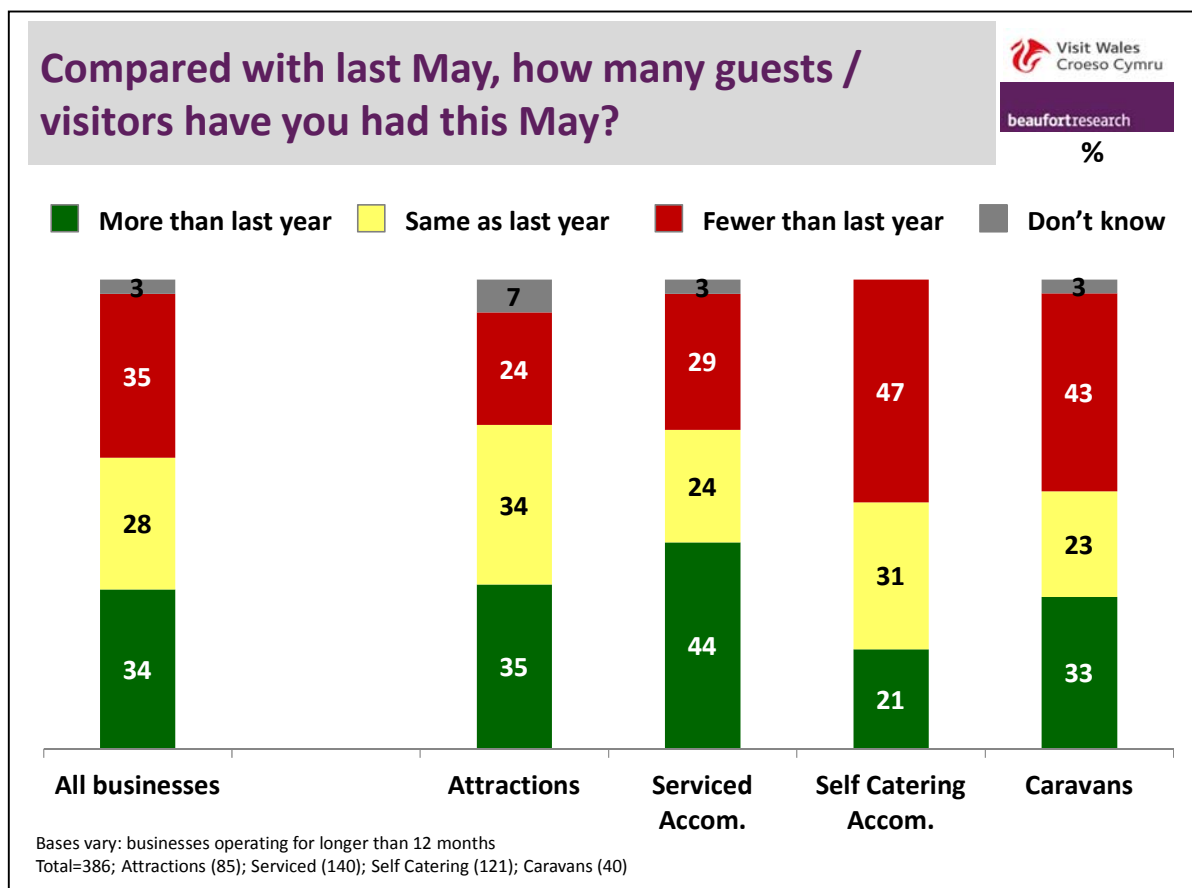
#### 3.1 Business Confidence

Those tourism businesses that had been established for longer than 12 months were asked to compare the number of guests/visitors that they had received this May compared to those they received throughout May last year - the findings for this wave were more positive than those seen in Easter 2013.

Just over a third (34%) said they had received more guests this May compared to last May (only 14% said this at Easter), although a similar proportion (35%) reported having received fewer guests/visitors compared to last year (49% said this at Easter). The remaining 28% of businesses said that they had received the same number of guests/visitors this May compared to the last.

Looking at this by business type, serviced accommodation showed the highest proportion of businesses receiving more guests (44%), while nearly half of self-catering accommodation providers (47%) and over two in five caravan sites (43%) reported that they had received fewer guests – see Figure 1 below.

Figure 1



Looking at the comparison of customers by region, it can be seen that the highest proportion of business reporting more guests were situated in South East Wales (43%), while the highest proportion reporting fewer guests (40%) were situated in North Wales.

Amongst those businesses that had received more guests, many claimed that this was because of better weather (23%) and their own marketing efforts (11%). One in ten (10%) mentioned events that had taken place in the area (10%), while similar proportion said that their upturn in guest/visitor figures was due to repeat business (8%) – see Table 2 below for more details.

**Table 2**

<b>Why would you say you have had more guests / visitors (unprompted)?</b>	<b>% respondents</b>
<b>Better weather</b>	23
<b>Own marketing</b>	11
<b>Events in the area</b>	10
<b>Repeat business</b>	8
<b>Improved rooms / facilities</b>	5
<b>Upturn in tourism</b>	3
<b>Recommendations</b>	3
<b>More British people staying in the UK</b>	2
<b>Increased capacity</b>	2
<b>More overseas visitors</b>	2
<b>Other</b>	51
<b>Don't know</b>	10

Base = businesses trading 12+ months with more visitors this May compared to last year (131)

Several businesses mentioned that their trade has increased due to word of mouth recommendations, while others felt that the Eisteddfod was responsible for their increase in guests/visitors.

Many also mentioned how increasing their online presence through sites such as Laterooms.com, TripAdvisor and Facebook had resulted in an increase in business.

For some, the downturn in the economy has proved a boost to their business.

*“The recession has made everyone stay longer for some reason. They are pre-booking and they are coming back”*

(Serviced Accommodation, Mid Wales)

Amongst those businesses that said they had received fewer guests this May compared to last May, around half felt that this was a direct result of the poor weather (53%) and economic climate (47%) – these were by far the most frequently mentioned reasons for the drop in trade – see Table 3 below for more details.

**Table 3**

<b>Why would you say you have had fewer guests / visitors (unprompted)?</b>	<b>% respondents</b>
<b>Weather not as good</b>	<b>53</b>
<b>Economic climate</b>	<b>47</b>
<b>Downturn in tourism in the area</b>	<b>6</b>
<b>Strong competition</b>	<b>3</b>
<b>Unforeseen problems</b>	<b>2</b>
<b>Didn't promote the business</b>	<b>1</b>
<b>Business winding down</b>	<b>1</b>
<b>Other</b>	<b>35</b>
<b>Don't know</b>	<b>4</b>

Base = businesses trading 12+ months with fewer visitors this Easter compared to last year (135)

There were calls from a number of these businesses for Visit Wales to increase their support of tourism businesses in Wales.

*“Visit Wales aren't supporting the smaller businesses enough”*  
(Serviced Accommodation, South East Wales)

*“Visit Wales could do more promotion of North Wales”*  
(Serviced Accommodation, North Wales)

*“There's a lack of publicity from Visit Wales...they favour South Wales”*  
(Self-Catering Accommodation, North Wales)

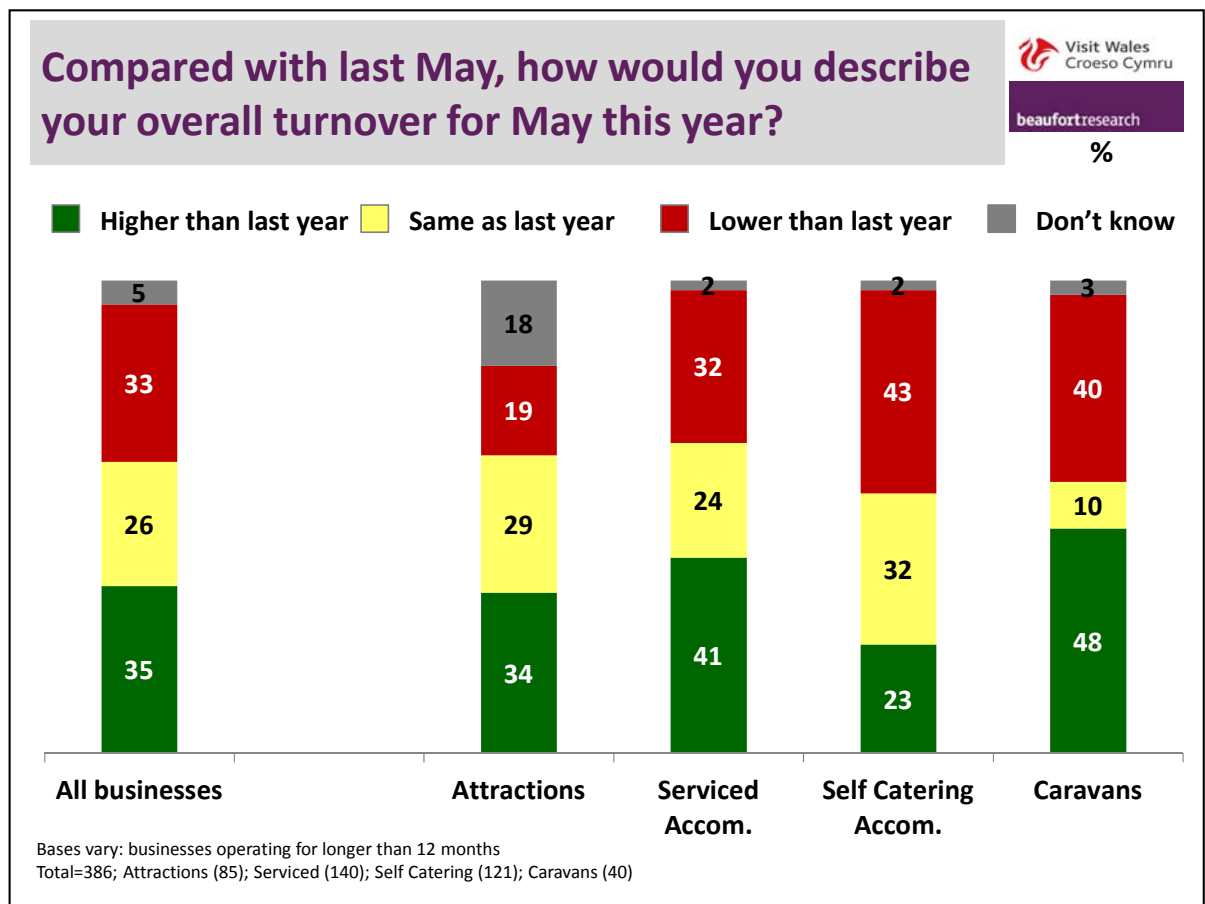
One business mentioned how discount voucher sites were negatively impacting on accommodation businesses.

*“Companies that use Groupon! If your business is worth £300 then you shouldn't sell it for £75 “*  
(Serviced Accommodation, North Wales)

Not surprisingly, when asked to compare their business' overall turnover for this May season compared to the previous year, the findings reflected those seen for number of guests/visitors. Around a third said that turnover was higher this year (35%), although around the same proportion said that turnover was lower (33%). The remaining 26% said that turnover this May was around the same as the level seen last year. These findings are again more positive than those seen in Easter, when only 17% of businesses reported that they had a higher turnover than the year before, and half (50%) said that their Easter turnover was lower.

Caravan sites were most likely to report that they had higher turnover this May (48%), while self-catering accommodation providers were most likely to report a reduction in turnover (43%). Saying that, two in five caravan sites reported lowered turnover this May compared to last, resulting in rather polarised data for this business type – see Figure 2 below.

**Figure 2**



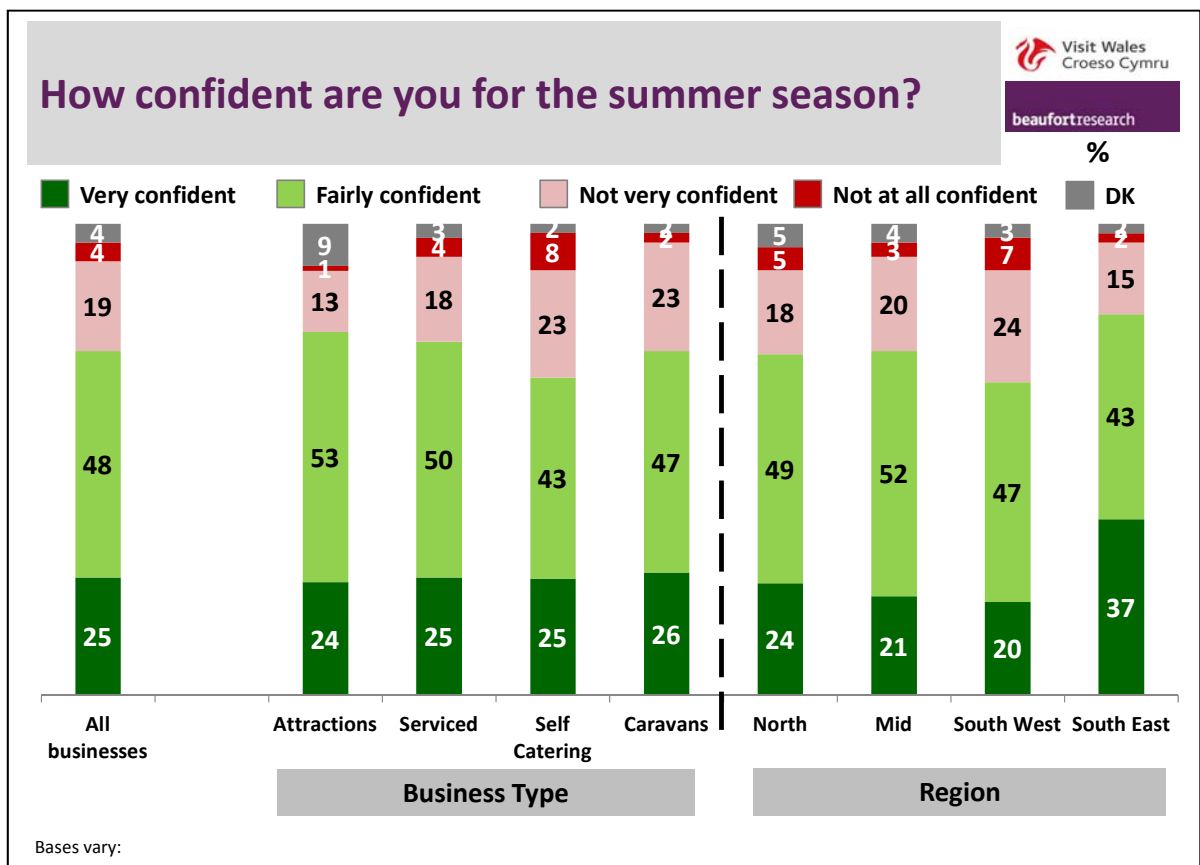
In terms of region, more businesses in South East Wales reported an increase in turnover compared to last year (43%), while more businesses in North and South West Wales reported a decrease (37% for each).

On the whole, businesses were optimistic about the coming summer season – this was also the case in Easter 2013.

Nearly three quarters (73%) said that they were confident for the summer season, with a quarter (25%) saying they were very confident, and nearly half (48%) fairly confident. However, a sizable minority of nearly a quarter (23%) were not confident for the upcoming summer, with 19% reporting that they were not very confident, and 4% not at all confident.

Across the different types of business, confidence levels were fairly consistent. Overall confidence levels were highest amongst attractions (77% confident) and those businesses located in South East Wales (80% confident); this was also the case in Easter 2013. No doubt, these two figures are related, as South East Wales has a high number of attractions (especially free of charge attractions) - see Figure 3 below.

Figure 3



### 3.2 Local Sourcing

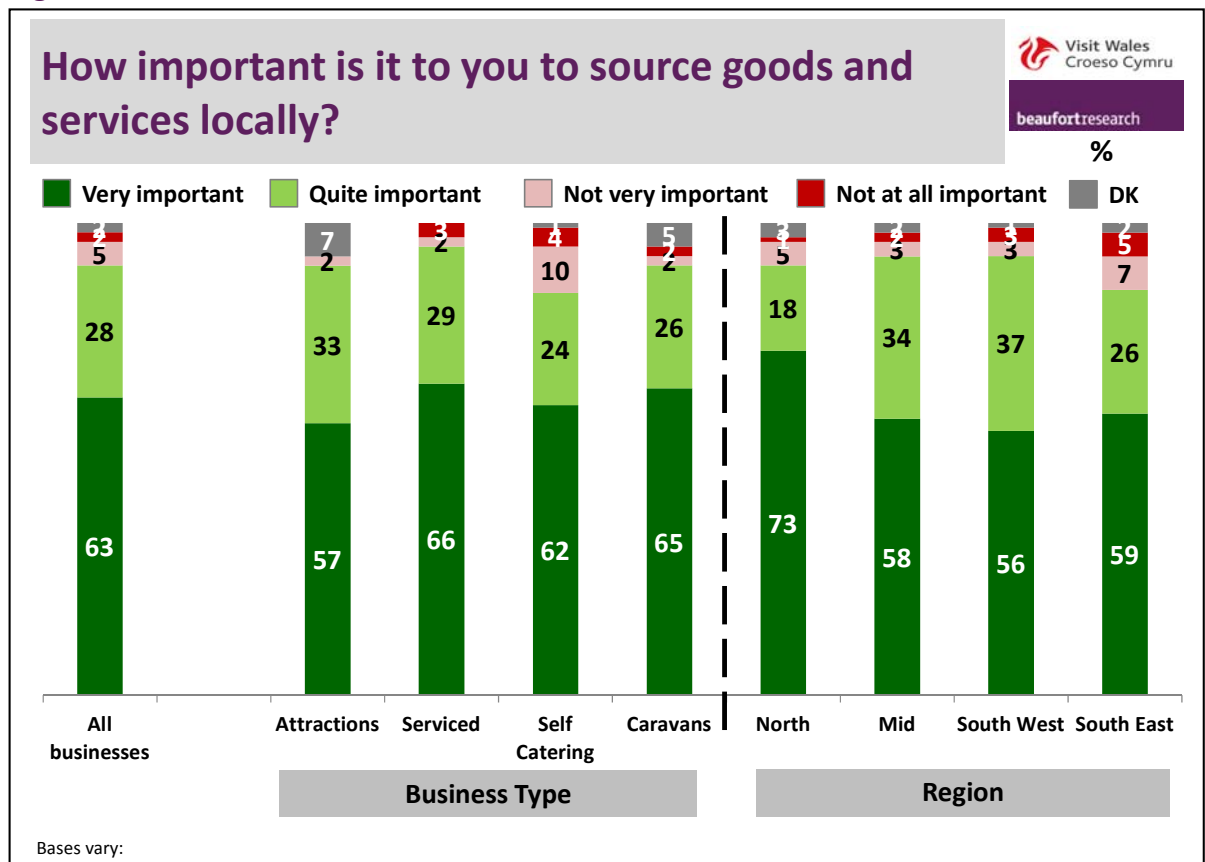
All businesses were asked how important they felt it was to source goods and services locally. The vast majority of businesses across all sectors and regions felt that it was important to a certain extent for their business to use local sources.

Overall, nine in ten (91%) businesses felt that it was important to source local goods and services, with most of these (63%) saying it was very important. Only a small proportion of 7% did not think it was important for their business to use local services.

Opinion across the various business sectors was fairly consistent; in all cases the vast majority felt that local sourcing was important, with around six in ten considering it to be very important.

When it came to region, those businesses based in North Wales were slightly more in favour of sourcing local goods and services; nearly three quarters (73%) said that this was very important, compared to around six in ten saying the same across the other areas of Wales – see Figure 4 below.

**Figure 4**



Businesses were then asked why they felt it was either important or not important to their business to source goods and services locally. Looking first at those who felt it was very important to their business, many comments centred on supporting the local economy.

*"It's keeping money in the local economy"*  
(Serviced Accommodation, North Wales)

*"It's part of being in a community....you want people in your area to thrive so you support them. In a small community it's important and it's good to be loyal. I am prepared to pay more to go local"*  
(Self-Catering Accommodation, South West Wales)

Others liked to be able to promote the use of Welsh products to their customers, and stated that their customers like the opportunity to be able to buy Welsh products.

*"Because we're Welsh we sell Welsh wine and anything else we sell we like to be able to say it's Welsh"*  
(Attraction, South East Wales)

*"It's a good marketing tool, and it helps the local economy as well"*  
(Serviced Accommodation, Mid Wales)

*"People like to buy things from Wales when they are on holiday"*  
(Attraction, South West Wales)

For some businesses, using local suppliers meant they were able to reduce their impact on the environment

*"Using local suppliers means we can reduce our carbon footprint"*  
(Serviced Accommodation, Mid Wales)

For the small minority of businesses that did not feel it was important to their business to source local goods and services, some comments related to the fact that local does not always mean good quality.

*"Locally produced isn't necessarily the best....we are a bed and breakfast and we've tried high class butchers in the local area and they are nowhere as good as a specialist in Aberystwyth, which is a national chain and probably isn't local meat"*  
(Serviced Accommodation, Mid Wales)

Many businesses did not think that sourcing local goods and services was important because of the nature of their business.

*“We are a self-catering cottage, and there’s very little produce provided”*

(Self-Catering Accommodation, South East Wales)

*“We are a branded hotel so we don’t buy locally”*

(Serviced Accommodation, South East Wales)

For others, locally produced goods and services were perceived to be expensive.

*“Price is a major factor”*

(Caravan Site, South West Wales)

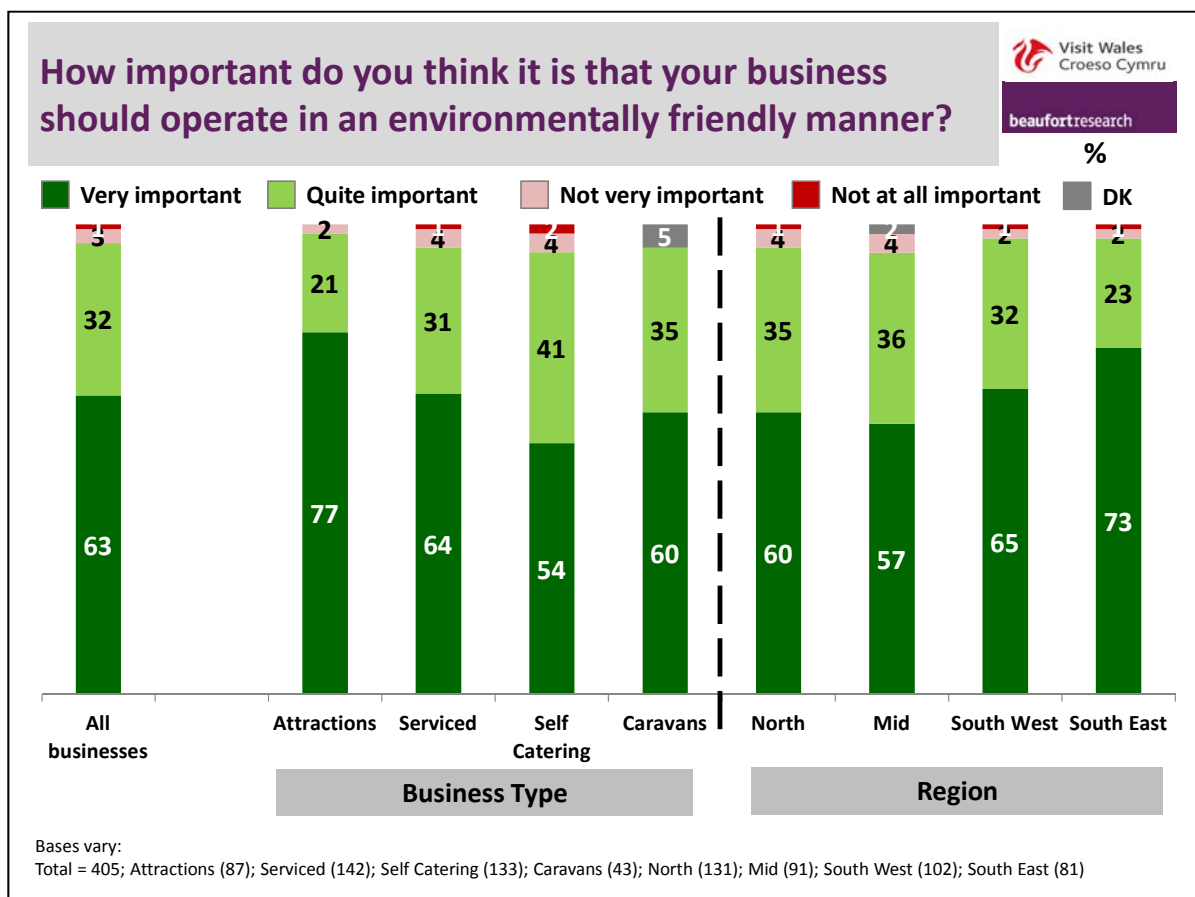


### 3.3 Sustainability

Businesses were asked how important it was that their business operated in an environmentally friendly manner. The vast majority of businesses across all sectors and regions felt that this was important, with nearly two thirds of businesses overall saying that this was very important (63%), and a further third (32%) saying it was fairly important to them (95% important overall). Only a very small minority of 4% said that operating in an environmentally friendly way was not important to their business.

Attractions, and those business located in the South East (where many attractions are situated) were most likely to report that being environmentally friendly was very important to their business (77% and 73% respectively) – see Figure 5 below.

Figure 5



Reflecting the perceived importance of operating in an environmentally friendly way, virtually all tourism businesses interviewed (99%) reported that they were practicing at least one environmentally friendly measure, with the average being four out of the eight listed. Moreover, almost half had an environmental policy in place (49%).

The vast majority were recycling (97%), while around three quarters were reducing the waste their business produced (73%) and conserving the energy they used (72%).

Around half were conserving the water they used (56%), while two in five were encouraging the use of alternatives to using cars for journeys (43%). A further third were using renewable energy sources (33%); only 1% said that they were not practicing any of the measures listed.

Other measures being practiced included recycling food waste, the use of alternative fuels (e.g. wood pellets or biomass heating), planting trees and educating their guest/visitors on how to be environmentally friendly – see Table 4 below.

**Table 4**

<b>Which, if any, of the following environmentally friendly measures is your business currently practicing (prompted)?</b>	<b>% respondents</b>
<b>Recycling</b>	97
<b>Reducing waste produced</b>	73
<b>Energy conservation</b>	72
<b>Water conservation</b>	56
<b>Environmental policy in place</b>	49
<b>Encouraging alternative transport to car</b>	43
<b>Renewable energy sources</b>	33
<b>Other</b>	9
<b>None of these</b>	1

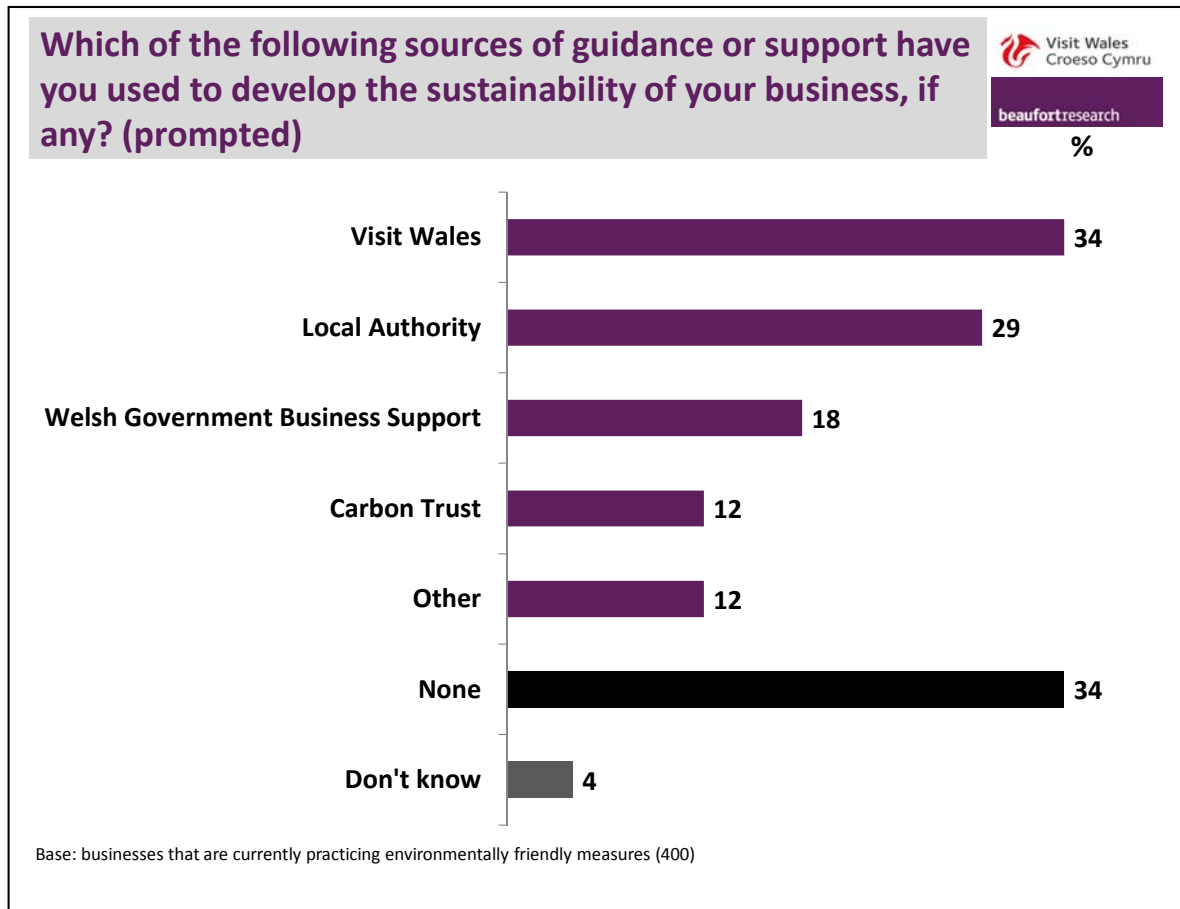
Base = all businesses (405)

Those businesses that were practicing environmentally friendly measures were asked if they had ever used any sources of guidance or support to develop the sustainability of their business. Around two thirds said that they had (62%), with the most frequently mentioned source of information being Visit Wales (34%).

A further 29% said that they had used their Local Authority for sustainability guidance, while one in five (18%) had used Welsh Government Business Support; a small proportion had consulted the Carbon Trust (12%).

Other sources of information and guidance mentioned included Cymal, the Green Dragon Scheme, National Park Trust and the Forestry Commission – see Figure 6 below.

Figure 6

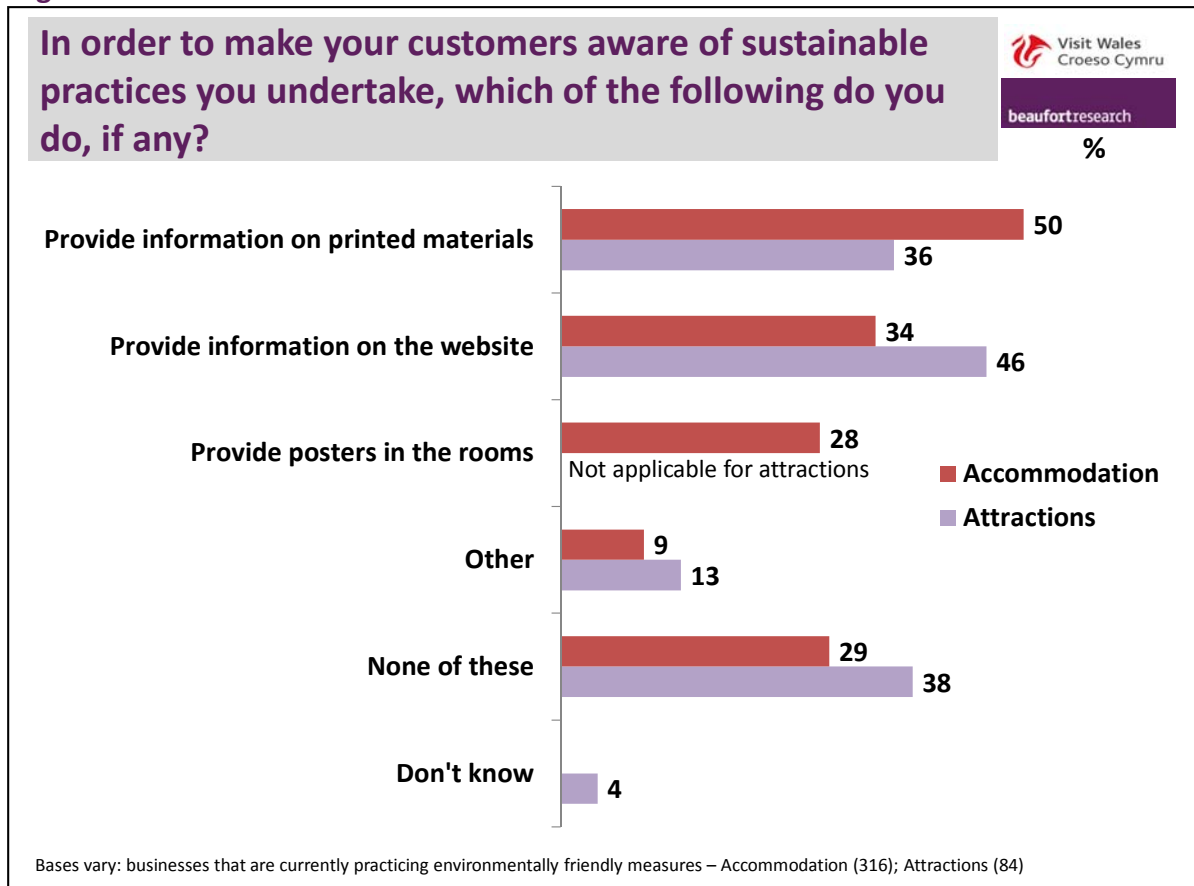


These businesses were also asked if they communicated their environmentally friendly measures to their guests/visitors; a slightly higher proportion of accommodation businesses were communicating their measures to guests (71%) compared to attractions (58%).

Half of accommodation businesses provided information on printed materials, compared to 36% of attractions saying this. Attractions were more likely to promote their environmentally friendly measures via their website (46%), while only 34% of accommodation businesses were doing this.

Around one in three accommodation businesses practicing environmentally friendly procedures were communicating these to their guests via posters in the rooms (28%); other ways of communicating measures included clearly labelled recycling bins, communications via the guest book and word of mouth – see Figure 7 overleaf.

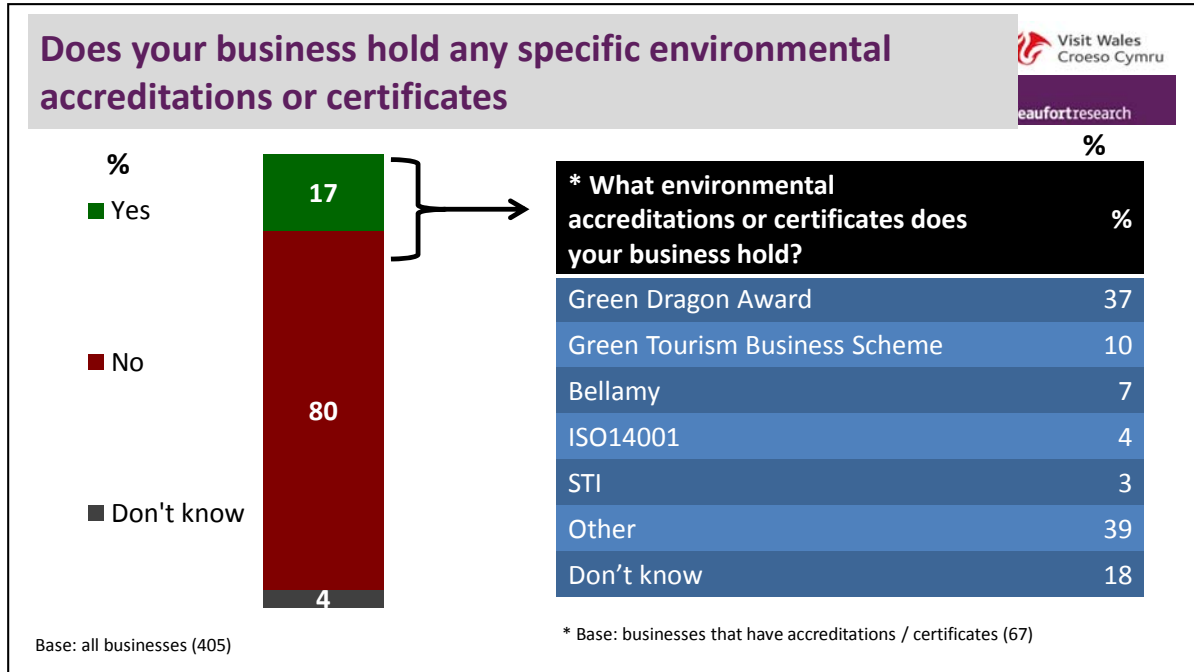
Figure 7



Only a relatively small proportion businesses practicing environmentally friendly measures had gained any specific environmental accreditations or certificates (17%) – the most frequently mentioned accreditation by far was the Green Dragon Award (37%), with small proportions mentioning the Green Business Tourism Scheme (10%), Bellamy (7%), ISO14001 (4%) and STI (3%).

Other accreditations and certificates that had been gained by businesses included the Green Flag, Local Authority Tourism Sustainability Award and accreditations from the Wales Tourist Board – see Figure 8 overleaf.

Figure 8



All businesses were then asked if they felt there were any barriers to their implementing environmentally friendly measures in their business. Most businesses felt that there were some barriers (71%), with by the far the most frequently mentioned being cost (40%). Around one in six mentioned the problems associated with legislation and planning permission (7%), while one in twenty felt that their customers were not particularly supportive of their environmentally friendly measures (5%).

Other barriers included their premises being a listed building and therefore limiting any energy saving modifications they could make, issues caused by their location and constraints imposed by the National Trust – see Table 5 below.

Table 5

What are the main barriers to implementing environmentally friendly measures in your business, if any (spontaneous)?	% respondents
Cost	40
Legislation / planning permission	7
Customers wouldn't do it / use it	5
It doesn't apply / impossible to implement	4
Finding the time	3
Lack of guidance on alternatives	1
Issues relating to waste	1
It would create more work	1
Lack of local suppliers	1
Other	28
None – there are no barriers	21
Don't know	8

Base = all businesses (405)

### 3.4 Public Transport

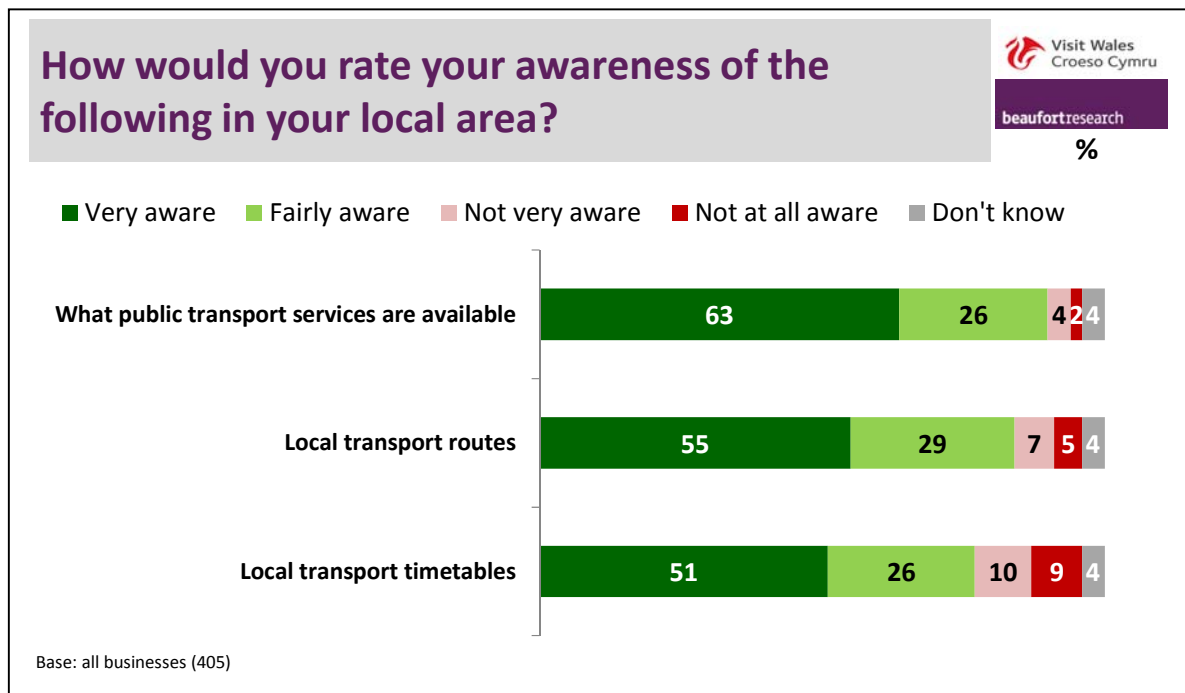
Tourism businesses were asked how aware they were of various aspects of public transport in their area, including the services that were available, routes and timetables.

On the whole, awareness of public transport was relatively high, with most businesses saying they were very or fairly aware of all of these aspects of public transport.

Awareness levels were highest when it came to what public transport services were available; two thirds of businesses said that they were very aware (63%), with a further 26% saying they were fairly aware of the public transport services available in their area. Only a small proportion of 6% said they were not aware of the public transport services in their area, and awareness levels were consistent across business sector and region.

Just over half of all tourism businesses interviewed said that they were very aware of the local transport routes in their area (55%), while 29% were fairly aware. Moreover, half were very aware of local transport timetables (51%) with a quarter saying they were fairly aware (26%). However, one in ten businesses reported that they were not aware of public transport routes (12%) and a sizable minority of 19% were not aware of local transport timetable in their area – see Figure 9 below.

**Figure 9**



Awareness levels of routes and timetables were lower for attractions, with 28% saying they were not aware of timetables and 17% not aware of routes.

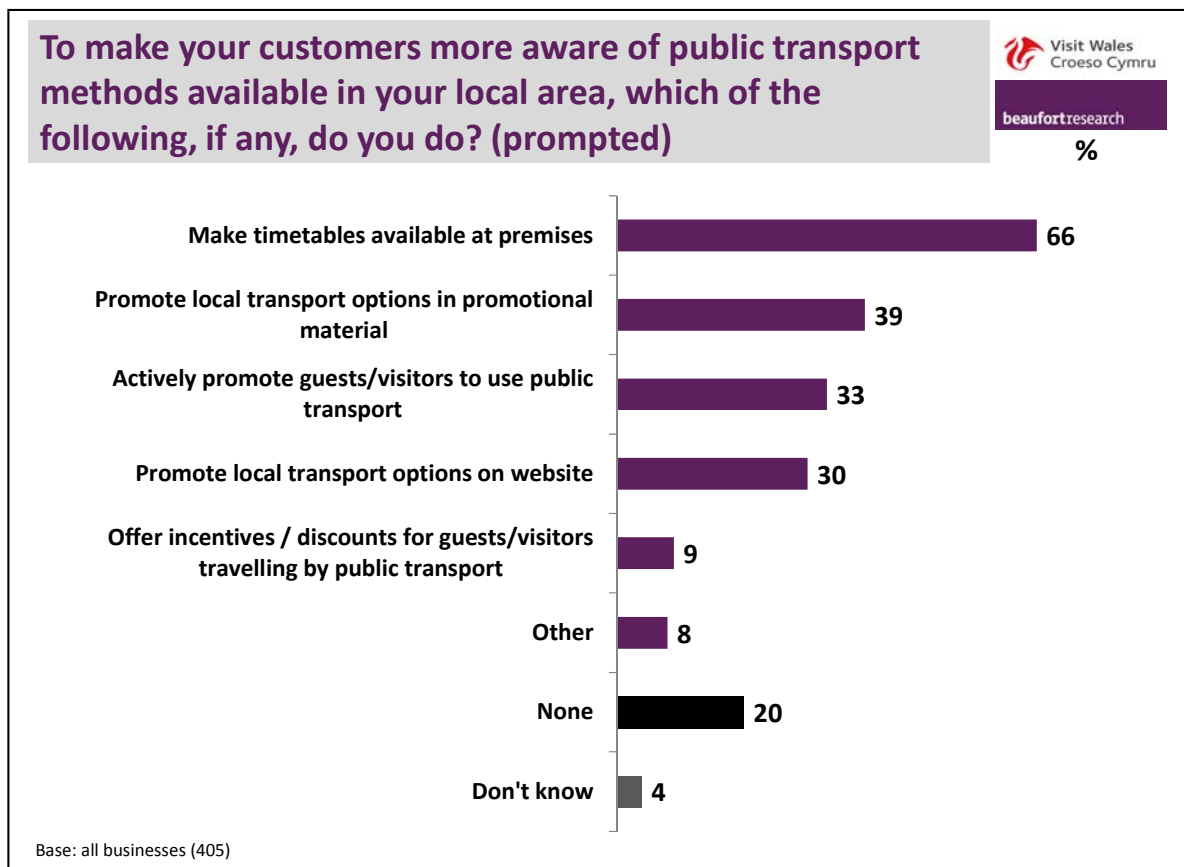
Around three quarters of tourism businesses said that they provide information and encouragement to their guests in relation to using public transport (76%).

The highest proportion of businesses made timetables available to their guests/visitors (66%), while around two in five (39%) promoted local transport in their promotional literature. A further third promoted local transport information on their website (30%).

Although a third (33%) of tourism businesses reported that they encouraged their guests/visitors to use public transport during their stay, only 9% provided any incentive to do so.

Some business actually provided transport for their guests/visitors, while other provided the option of hiring cycles – see Figure 10 below.

**Figure 10**



Serviced accommodation and caravan sites were most likely to provide their guests with information about local transport in the area (84% for each) – promotion of public transport across the different regions was consistent.

# APPENDIX

## Survey Questionnaire



**VISIT WALES BUSINESS SURVEY 2013 – WAVE 2**  
**FINAL QUESTIONNAIRE (22<sup>ND</sup> May 2013)**

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

Can I just check, are you the owner of the business or in a managerial role at the business?

**IF NO ask to speak to person in a managerial role/ owner.**

**S1** Can I just check – do you speak Welsh?

Yes – fluently → **S2**

Yes – not fluently → **S2**

No – does not speak Welsh → **Q1**

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

English

Welsh

**CORE QUESTIONS**

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

*Yes (Go to Q2)*

*No (Go to Q6)*

**Q2** Compared with May last year, how many guests/visitors have you had this May?  
**READ OUT – SINGLE CODE**

*More than last year → Q3*

*Same as last year → Q5*

*Fewer than last year → Q4*

*Don't know → Q5*

**Q3** (IF MORE) Why would you say you have had more guests/visitors?  
**DO NOT PROMPT – CODE ALL MENTIONED**

*More British people staying in the UK*

*Better weather*

*Own marketing*

*Repeat business*

*Upturn in tourism*

*Recommendations*

*Increased capacity*

*Events in the area*

*Improved rooms/facilities*

*More overseas visitors*

*Other (please specify)*

*Don't know*

**Q4 (IF FEWER) Why would you say you have had fewer guests/visitors?  
DO NOT PROMPT – CODE ALL MENTIONED**

- Economic climate*
- Weather not as good*
- Unforeseen problems*
- Strong competition*
- Downturn in tourism in the area*
- Business winding down*
- Fewer overseas visitors*
- Didn't promote the business*
- Other (please specify)*
- Don't know*

**Q5 Compared with last May, how would you describe the overall turnover for May this year?  
READ OUT – SINGLE CODE**

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

**ASK ALL**

**LOCAL SOURCING**

**Q6 How important is it to you to source goods and services locally?  
READ OUT – INVERT SCALE BETWEEN RESPONDENTS**

- Very important*
  - Quite important*
  - Not very important*
  - Not at all important*
  - Don't know → Q8*
- } **Q7**

**Q7 Why do you say that?  
RECORD VERBATIM**

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*Don't know*

## **SUSTAINABILITY**

**Q8 How important do you think it is that your business should operate in an environmentally friendly manner?**

**READ OUT – INVERT SCALE BETWEEN RESPONDENTS**

*Very important*

*Quite important*

*Not very important*

*Not at all important*

*Don't know*

**Q9 Which, if any, of the following environmentally friendly measures is your business currently practicing? PROBE – Any others?**

**READ OUT – CODE ALL MENTIONED. RANDOMISE LIST**

*Recycling*

*Renewable energy sources*

*Energy conservation*

*Water conservation*

*Encouraging alternative transport to car*

*Environmental policy in place, e.g. Green Dragon scheme*

*Reducing waste produced*

*Other (please specify)*

*None of these → SKIP TO Q13*

*Don't know → SKIP TO Q13*

**Q10 Which of the following sources of guidance or support have you used to develop the sustainability of your business, if any? PROBE. Any others?**

**READ OUT – CODE ALL MENTIONED. RANDOMISE LIST**

*Visit Wales*

*Welsh Government Business Support*

*Local Authority*

*Carbon Trust*

*Other (please specify)*

*None of these*

*Don't know*

**Q11 What are the main barriers to implementing environmentally friendly measures in your business, if any?**  
**DO NOT PROMPT – CODE ALL MENTIONED**

*Cost*

*It doesn't apply / impossible to implement (e.g. no public transport nearby)*

*Finding the time*

*Legislation / planning permission*

*It would create more work for us to do*

*Issues relating to waste*

*Customers wouldn't do it / use it*

*Lack of guidance on alternatives*

*Lack of local suppliers*

*Reduced efficiency (using alternative energy / transport)*

*Other (please specify)*

*None – there are no barriers*

*Don't know*

**Q12 In order to make your customers aware of sustainable practices you undertake, which of the following do you do, if any? PROBE - Any others**  
**READ OUT – CODE ALL MENTIONED. RANDOMISE LIST**

*Provide posters in the rooms (ONLY IF ACCOMMODATION)*

*Provide information on the website*

*Provide information on printed materials*

*Other (please specify)*

*None of these*

*Don't know*

**Q13 Does your business hold any specific environmental accreditations or certificates?**

*Yes → Q14*

*No → Q16*

*Don't know → Q16*

**Q14 What environmental accreditations or certificates does your business hold?  
DO NOT PROMPT – CODE ALL MENTIONED**

*Green Dragon Award*  
*Green Tourism Business Scheme*  
*ISO14001*  
*STI*  
*Bellamy*  
*Other (please specify)*

*Don't know*

**Q15 Why did your business choose to obtain these environmental accreditations or certificates?  
RECORD VERBATIM**

\_\_\_\_\_  
\_\_\_\_\_

*Don't know*

**PUBLIC TRANSPORT**

**READ OUT - The next few questions are about public transport in your local area.**

**Q16 How would you rate your awareness of the following in your local area?  
READ OUT – INVERT SCALE BETWEEN RESPONDENTS**

*Very aware*  
*Fairly aware*  
*Not very aware*  
*Not at all aware*  
*Don't know*

**RANDOMISE ORDER PRESENTED**

- What public transport services are available (i.e. trains, buses etc)
- Local transport timetables
- Local transport routes

**Q17 In order to make your customers more aware of public transport methods available in your local area, which of the following, if any, do you do? PROBE – Any others?  
READ OUT – CODE ALL MENTIONED. RANDOMISE LIST**

*Make timetables available at your premises*  
*Promote local transport options in your promotional material*  
*Actively prompt guests / visitors to use public transport*  
*Promote local transport options on your website*  
*Offer incentives / discounts for guests / visitors travelling by public transport*  
*Other (please specify)*

*None - we do not actively make customers aware of public transport*  
*Don't know*

**CORE QUESTIONS**

**Q18 Which of the following best describes your location?  
READ OUT – SINGLE CODE**

*Seaside*  
*Urban*  
*Inland*  
*Don't know*

**Q19 Finally, how confident are you for the summer season?  
READ OUT – INVERT SCALE BETWEEN RESPONDENTS**

*Very confident*  
*Fairly confident*  
*Not very confident*  
*Not at all confident*  
*Don't know*

**Q20 To help with the analysis, can I ask is your business graded or accredited by Visit Wales?**

*Yes*  
*No*  
  
*Don't know*

**READ OUT**

**Thank you for your time.**

**Just to confirm that my name is xxxxx calling from Beaufort Research and that this survey has been conducted according to the Market Research Society Code of Conduct.**

**If you'd like to check our credentials, you can telephone the MRS via the freephone number 0500 39 69 99.**

**Thanks again and goodbye.**