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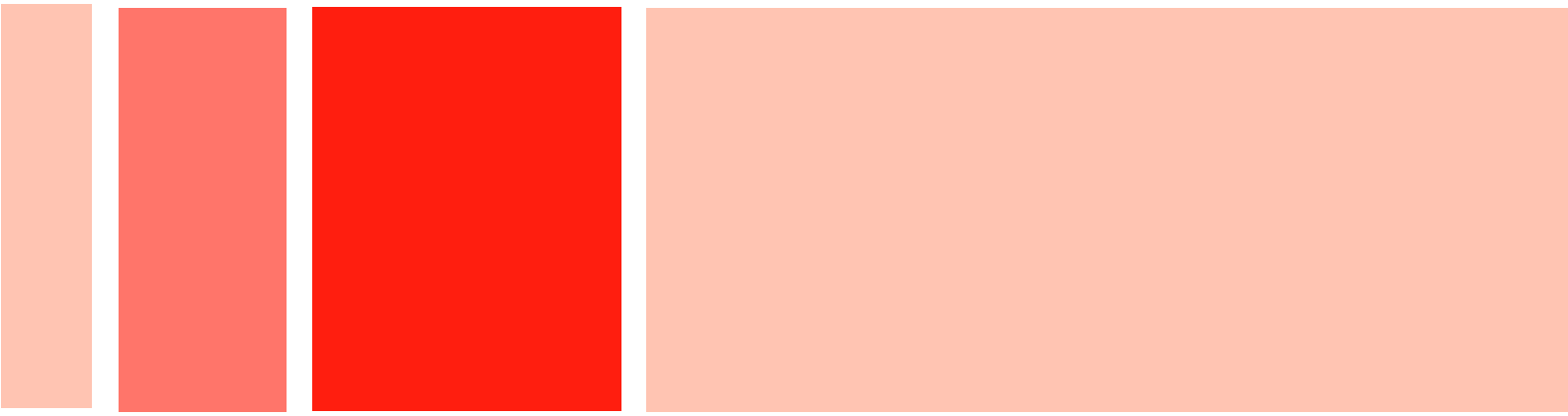
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Wales Tourism Business Survey Wave 2, 2015



Wales Tourism Business Survey – Wave 2, 2015

Research on behalf of Visit Wales

Catrin Davies, Beaufort Research Ltd.

The logo for Beaufort Research, featuring the company name in white lowercase letters on a solid purple rectangular background.

beaufortresearch

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

For further information please contact:

Robert Lewis

Head of Tourism & Research

Social Research Division

Welsh Government

QED Centre, Treforest Industrial Estate

Pontypridd, Rhondda Cynon Taff, CF37 5YR

Tel: 0300 061 6038

Email: robert.lewis@wales.gsi.gov.uk

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APPENDIX

SURVEY QUESTIONNAIRE

KEY FINDINGS

Business Confidence

Nearly two fifths of businesses had received more guests/visitors this August compared to last August; a further 38% had a similar level of business. This means that three quarters of tourism businesses in Wales received increased or similar levels of guests compared with August 2014.

Amongst those businesses that had received more guests/visitors, there was no overriding reason for the increase; however, most attributed the upsurge in visitors to their own marketing or to the events in the area (10% for each). Conversely, amongst the businesses that had received fewer guests/ visitors, over half, felt that this was as a direct result of poor weather, and a further 12% blamed their lower numbers on the economic climate.

When asked to compare their business' overall turnover for this August compared to last, the findings were similar to the number of guests/visitors received. Around two fifths of all businesses said their turnover had been higher this year, with nearly a quarter stating it had been lower.

Nearly three quarters of businesses were confident about the upcoming autumn season, with 22% very confident and 51% fairly confident.

Rugby World Cup

Businesses were firstly asked if their combined number of advanced bookings for September and October this year was higher, lower or the same as the advanced bookings they had received for September and October last year. As Wales will be hosting some of the games for the Rugby World Cup during these autumn months, this question was asked in order to gauge whether tourism businesses in Wales had seen an increase in bookings for these months in comparison with the same time last year (presumably as a result of the tournament).

Roughly, a third of tourism businesses reported no change in advanced bookings. Saying that, 27% reported an increase in bookings, while a similar proportion (24%) reported a decrease in advanced bookings.

Businesses that said they had received a higher number of advanced bookings for September and October were then asked why they thought advanced bookings had improved for the autumn season this year. This question was asked in order to see if businesses would spontaneously attribute this rise in bookings to the Rugby World Cup.

The businesses that had seen a rise in the number of advanced bookings for September and October were most likely to mention the Rugby World Cup (16%).

Tourism businesses that said that their bookings for September and October this year did not compare favourably to last year, were also asked why they thought that was.

Two fifths of the businesses that had received fewer advanced bookings this year attributed the dip in numbers to the poor weather.

Businesses were then asked whether they knew that Wales was hosting some of the games for the Rugby World Cup this year. The majority of businesses stated 'yes', they were aware of this (81%).

Businesses were then asked whether they felt the Rugby World Cup would impact on their business. Over three quarters of businesses surveyed felt that it would have no impact; 17% felt it would have a positive impact on their business, while only 4% felt that it would have a negative impact.

When the businesses that believed that the Rugby World Cup would have no impact on their business were asked why they thought that, over three quarters of them said it was because they were based too far away from the games / Cardiff.

The businesses that felt that the Rugby World Cup would have a positive impact on their business based this on the fact that they had either already seen an increase in bookings / business or believed they would see an increase in the number of bookings/ business (41%). A quarter of the businesses that felt the Rugby World Cup would have a positive impact also believed it would bring more people to the area and as a result their businesses would benefit financially. A further 12% of businesses felt that it would benefit Wales generally by helping to promote the country and generate more interest among potential visitors from outside Wales.

For businesses that said they thought that the Rugby World Cup would have a negative impact on their business (only 14 businesses), most said they were worried that visitors might be less inclined to visit their attraction / area whilst the games were on as they would rather watch the games, either at home or in the pub (12 businesses- NB very small base size).

Visitor Origin

Just over a quarter of businesses reported an increase in the number of visitors from Germany compared with 2014, whilst another quarter had seen an increase in visitors from 'other overseas countries'. One in six businesses reported an increase from Australia and New Zealand, and USA and Canada (17% and 16% respectively), while slightly smaller proportions had seen an increase in French visitors (14%). Only 7% had seen an increase in the number of visitors from Ireland.

However, relatively large proportions of businesses did not receive visitors from these countries.

1. INTRODUCTION AND OBJECTIVES

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

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

To achieve the required quick turnaround, a strict timetable is adhered to for each wave of the survey. Fieldwork is scheduled to take place immediately following a given date: this report relates to the late August bank holiday period 2015. 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 2015 survey are:



Business confidence

Number of guests / visitors this August compared to the previous year and confidence in the 2015 autumn season;



The Rugby World Cup

Number of advanced bookings in the early autumn months, awareness of the Rugby World Cup in Wales, potential impact on their business and reasons for this opinion;



Visitor origin

Where visitors are travelling from and whether the proportions of overseas visitors from various countries have changed in the last 12 months.

This report contains the main findings arising from the survey.

2. METHODOLOGY

The survey was conducted via telephone using CATI (Computer Assisted Telephone Interviewing) technology from the Beaufort Research dedicated interviewing unit. Interviews took around 5 –8 minutes to complete and all respondents were offered the choice of conducting the interview in the language of their choice, English or Welsh. A total of 25 individuals undertook the interview in Welsh; take-up of this option was highest in North Wales (30%), and lowest in South West Wales (0%).

A total of **406 interviews** were conducted, and fieldwork took place on 1st and 2nd of September 2015. This report was produced on Tuesday 8th September; 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 most 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 parks / campsites

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

North Wales	Mid Wales	South West Wales	South East Wales
Anglesey	Ceredigion	Carmarthenshire	Blaenau Gwent
Conwy	Gwynedd*	Neath Port Talbot	Bridgend
Denbighshire	Powys	Pembrokeshire	Caerphilly
Flintshire		Swansea	Cardiff
Gwynedd*			Merthyr Tydfil
Wrexham			Newport
			Monmouthshire
			Rhondda Cynon Taff
			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. Small weighting factors were applied at the analysis stage to fine-tune the profile of the sample to reflect the profile of the business universe.

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

Business Type	Region				TOTAL
	North	Mid	South West	South East	
Attractions	27	14	20	16	77
Accommodation – serviced	43	29	28	33	133
Accommodation – self-catering	43	28	38	23	132
Accommodation – caravans	21	14	22	7	64
TOTAL	134	85	108	79	406

Table 2 below illustrates the number and relative proportion of interviews undertaken with within each of the key sub-groups used in the analysis of the data.

Table 2: Sub-group Classifications	No. of interviews	% of weighted sample
Business Type		
Attractions	77	20
Accommodation – Total	329	80
Accommodation – graded	285	69
Accommodation – ungraded	44	11
Accommodation Type		
Total – serviced	133	30
Total – self catering	132	30
Total – caravans	64	20
Graded – serviced	111	25
Graded – self catering	117	27
Graded – caravans	57	18
Ungraded – serviced	22	5
Ungraded – self catering	15	3
Ungraded – caravans	7	2
Region		
North Wales	134	35
Mid Wales	85	20
South West Wales	108	25
South East Wales	79	20
Business Location		
Inland	217	53
Seaside	158	39
Urban	30	8

3. MAIN FINDINGS

3.1 Business Confidence

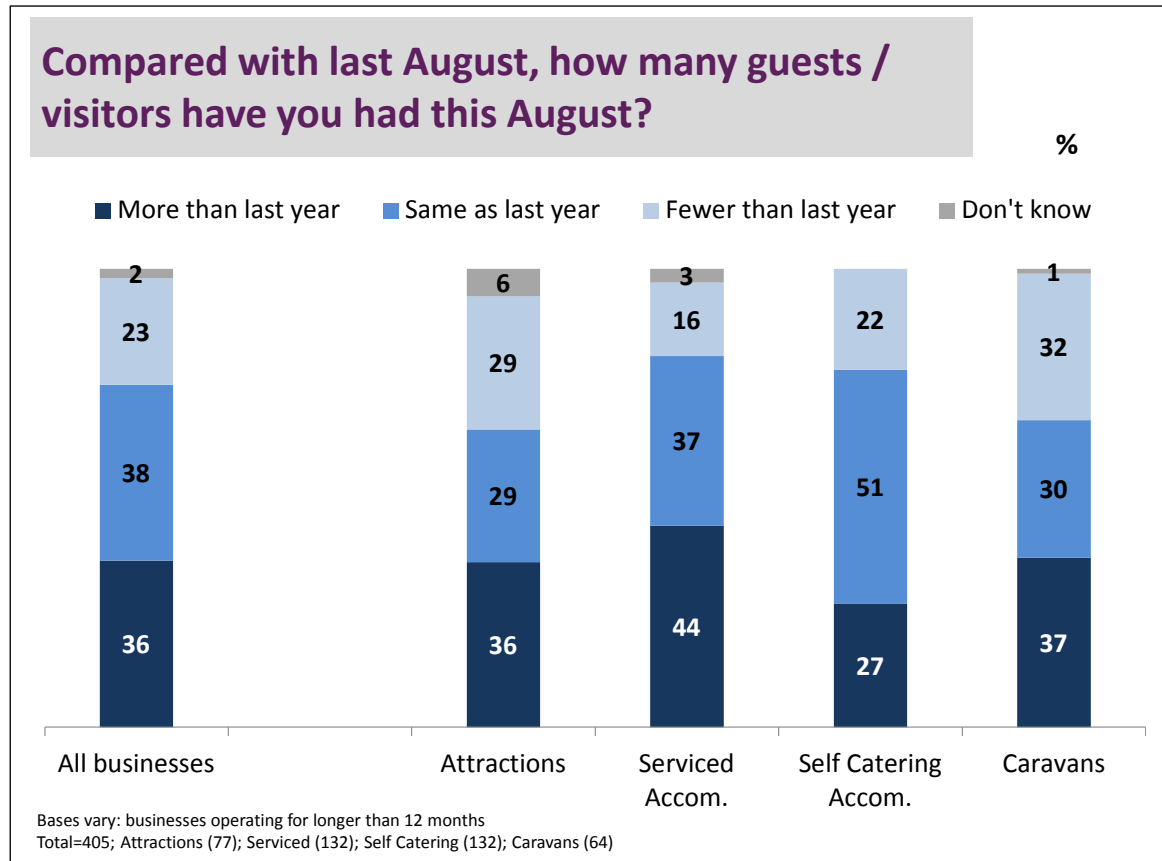
Those tourism businesses that had been established for longer than 12 months were asked to compare the number of guests/visitors that they had received this August compared to those they received during August last year.

Nearly two fifths of businesses had received more guests/visitors this August compared to last August; a further 38% had a similar level of business. This means that three quarters of tourism businesses in Wales received increased or similar levels of guests compared with August 2014.

Almost a quarter of businesses stated they had received fewer guests/visitors; this is a higher proportion of businesses reporting having fewer visitors than in a similar survey conducted in 2014, where only 16% of businesses had reported having fewer visitors compared to August 2013.

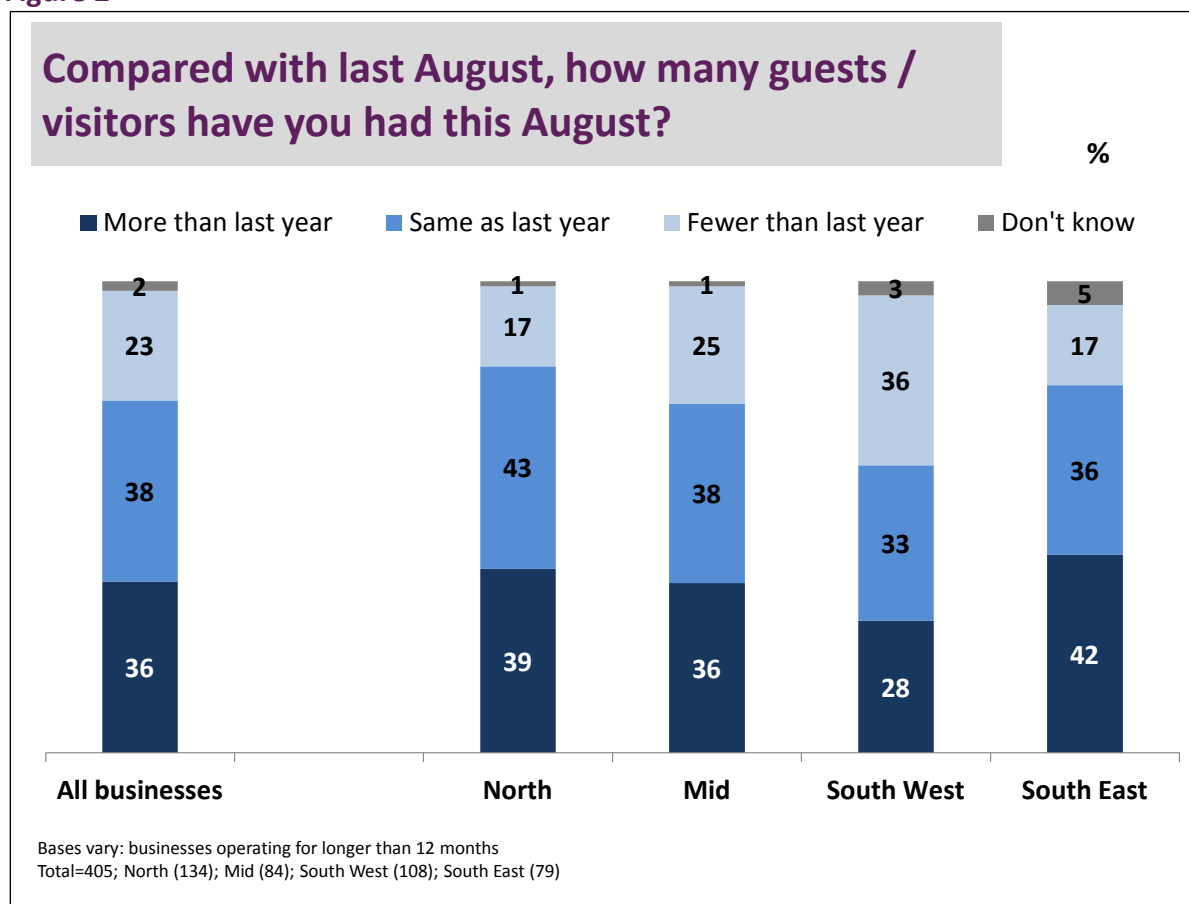
Looking at the data by business type, serviced accommodation showed the highest proportion of businesses receiving more guests/visitors than the previous year (44%), followed by caravans and attractions (37% and 36% respectively). However, caravans were most likely to report fewer visitors (32%) – see Figure 1 overleaf.

Figure 1



Examining guest/visitor numbers by region; the highest proportion of business reporting more guests/visitors were situated in South East Wales (42%), closely followed by North Wales and then Mid Wales (39% and 36% respectively). Fewer businesses in South West Wales reported seeing an increase in business this August compared to last August and businesses in this region were also the most likely to report that they had received fewer visitors than last year (36%) – see Figure 2 overleaf.

Figure 2



Amongst those businesses that had received more guests/visitors, there was no overriding reason for the increase; however, most attributed the upsurge in visitors to their own marketing or to the events in the area (10% for each).

Other factors were mentioned by smaller proportions of businesses: one in ten felt that there had been a general upturn in tourism in the area and that more British people were choosing to stay in the UK (9% for both). Businesses also felt that recommendations and the use of online booking sites, such as booking.com and Airbnb had been beneficial for their business (7% for each). Small proportions also believed there had either been an increase in the number of attractions in the area or that the success of other tourism businesses in the area had ensured a positive effect on their own business (6%). For more examples of the reasons given, see Table 3 overleaf.

Table 3

Why would you say you have had more guests / visitors? (Unprompted)	% businesses
Own marketing	10
Events in the area	10
Upturn in tourism	9
More British people staying in the UK	9
Recommendations	7
More internet bookings / using booking sites	7
More attractions in the area / other tourism businesses doing well	6
Improved rooms/facilities	5
Better weather	5
Better publicity / marketing generally	5
Unrest abroad / terrorism	5
Better economy generally/ people have more disposable income	4
Repeat business	4
Increased capacity	3
Bad weather attracts visitors	2
Prices / rates are right/ reasonable	2
Increase in the number of weddings	2
Trip Advisor	2
More overseas visitors	2
Other	14
Don't know	16

Base = businesses trading 12+ months with more visitors this August compared to last year (145)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

Looking at the reasons given for increased business by region, more businesses in the South East and the South West of Wales believed that an increase in events in the area had benefited their business (16% and 11% respectively). Businesses in South East and North Wales were more likely to attribute their higher numbers to a general upturn in tourism in the area (16% and 11%).

Caravan businesses were significantly more likely to believe their visitor numbers were higher as a result of more British people choosing to stay in the UK compared to other accommodation providers (21% of caravan businesses compared to 8% self-catering and 4% serviced accommodation providers).

Amongst businesses that had received fewer guests/visitors this August, over half felt that this was as a direct result of poorer weather, and a further 12% blamed their lower numbers on the economic climate.

A smaller number of businesses believed there was a general downturn in tourism in the area and some felt they had lost business due to strong competition (9% and 6% respectively). Smaller proportions again reported that more people were going abroad (because the pound is currently strong against the euro) (5%); that there was a lack of advertising and the area was not being promoted enough, or there were some unforeseen problems (3% for each). Table 4 below lists the reasons given by 3% or more of businesses.

Table 4

Why would you say you have had fewer guests / visitors? (Unprompted)	% businesses
Weather not as good	52
Economic climate	12
Downturn in tourism in the area	9
Strong competition	6
More people going abroad (the pound is strong so people prefer to go to Europe)	5
Lack of advertising / area not being promoted enough	3
Unforeseen problems	3
Other	16
Don't know	21

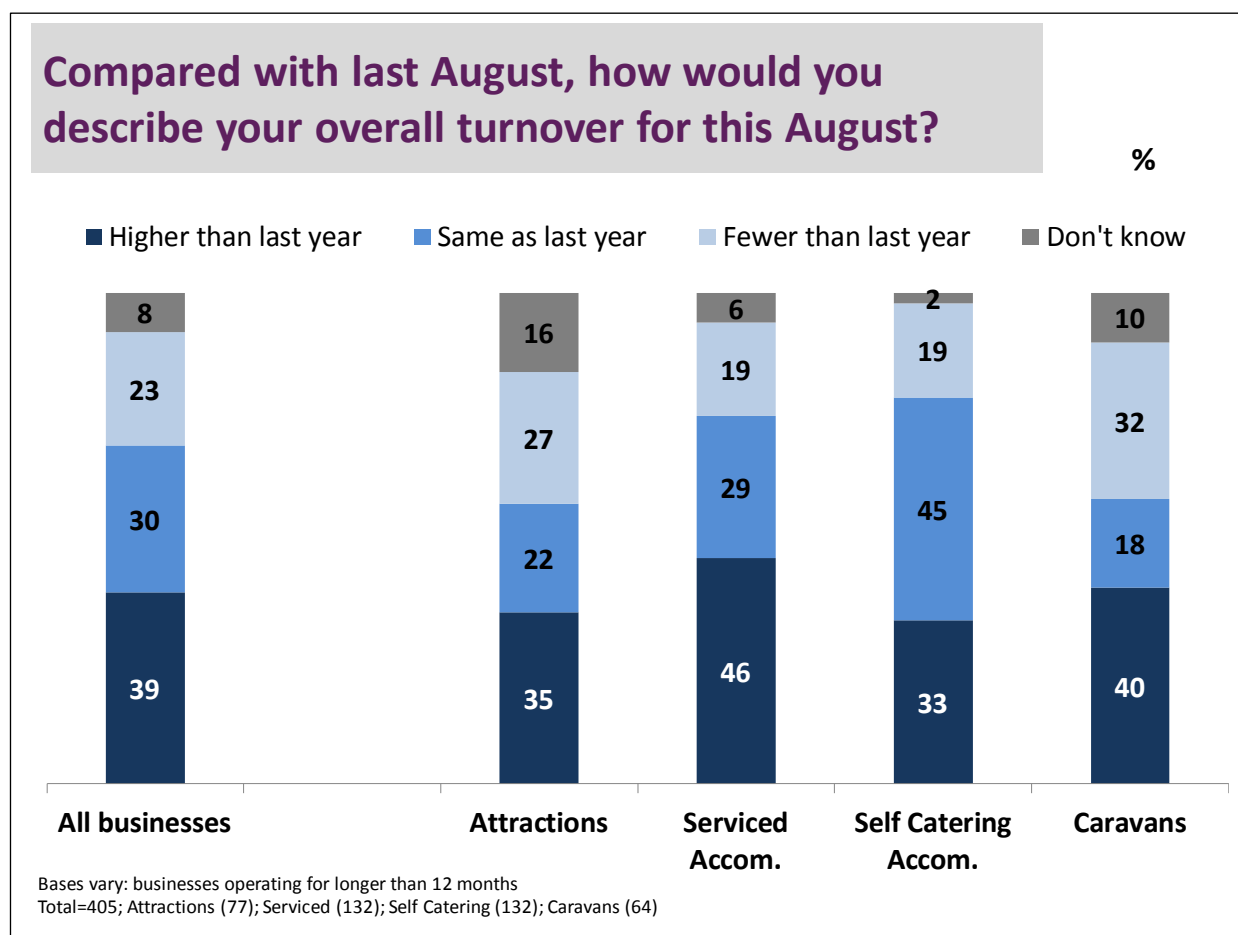
Base = businesses trading 12+ months with fewer visitors this August compared to last year (94)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

When asked to compare their business' overall turnover for this August compared to last, the findings were similar to the number of guests/visitors received. Around two fifths of all businesses said their turnover had been higher this year, with 23% stating it had been lower.

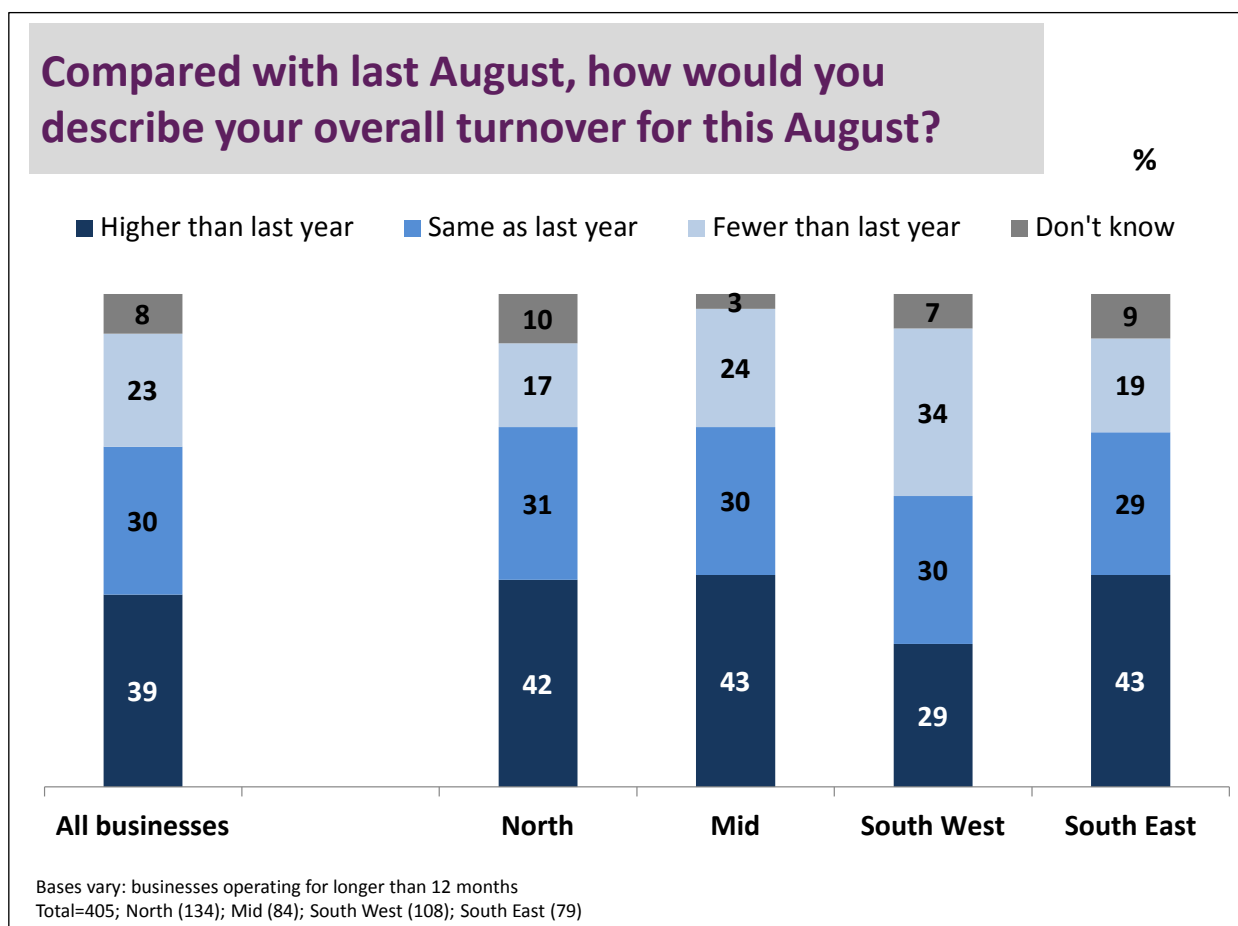
In 2015, serviced accommodation businesses were most likely to report that they had received higher turnover this August compared to last (46%), while caravan parks were most likely to report a decrease in turnover (32%). The poor weather this summer might have contributed to this as caravan businesses were the most likely to blame the weather for their lower visitor numbers this summer - see Figure 3 overleaf for more details.

Figure 3



In terms of region, businesses in South East Wales and Mid Wales were equally likely to report an increase in turnover compared to last year (43% for both), while businesses in the South West were significantly more likely to report a decrease (34%) – see Figure 4 below.

Figure 4

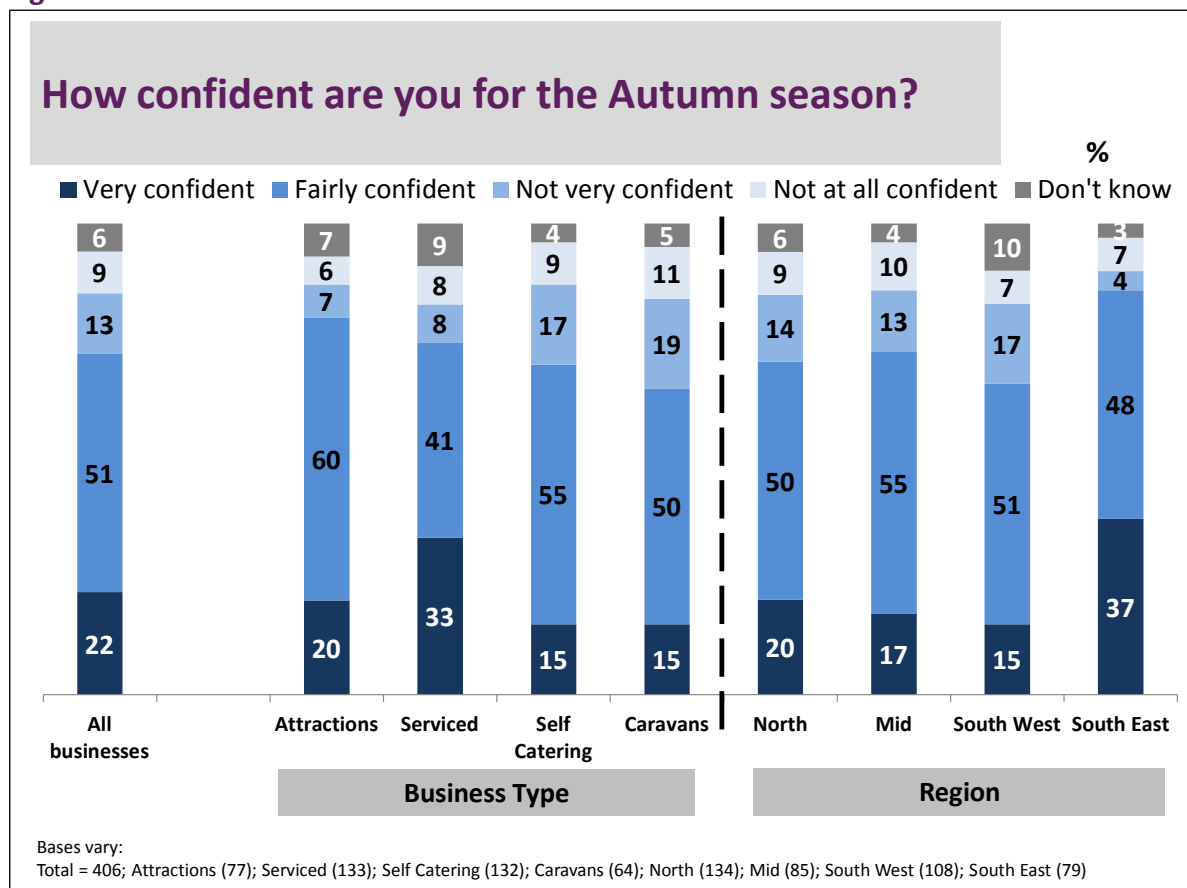


Nearly three quarters of businesses were confident about the upcoming autumn season, with 22% very confident and 51% fairly confident.

Across the different types of business, confidence levels were fairly consistent (with the exception of caravan parks). Overall, confidence levels were highest amongst attractions (80% confident). For caravan businesses, 65% were confident about the coming autumn season.

Regionally, confidence was highest for those businesses located in South East Wales while businesses in the South West were least confident (85% confident in South East Wales compared to 66% in South West Wales) – see Figure 5 overleaf.

Figure 5



3.2 Rugby World Cup

Businesses were firstly asked if their combined number of advanced bookings for September and October this year was higher, lower or the same as the advanced bookings they had received for September and October last year. As Wales will be hosting some of the games for the Rugby World Cup during these autumn months, this question was asked in order to gauge whether tourism businesses in Wales had seen an increase in bookings for these months in comparison with the same time last year (presumably as a result of the tournament).

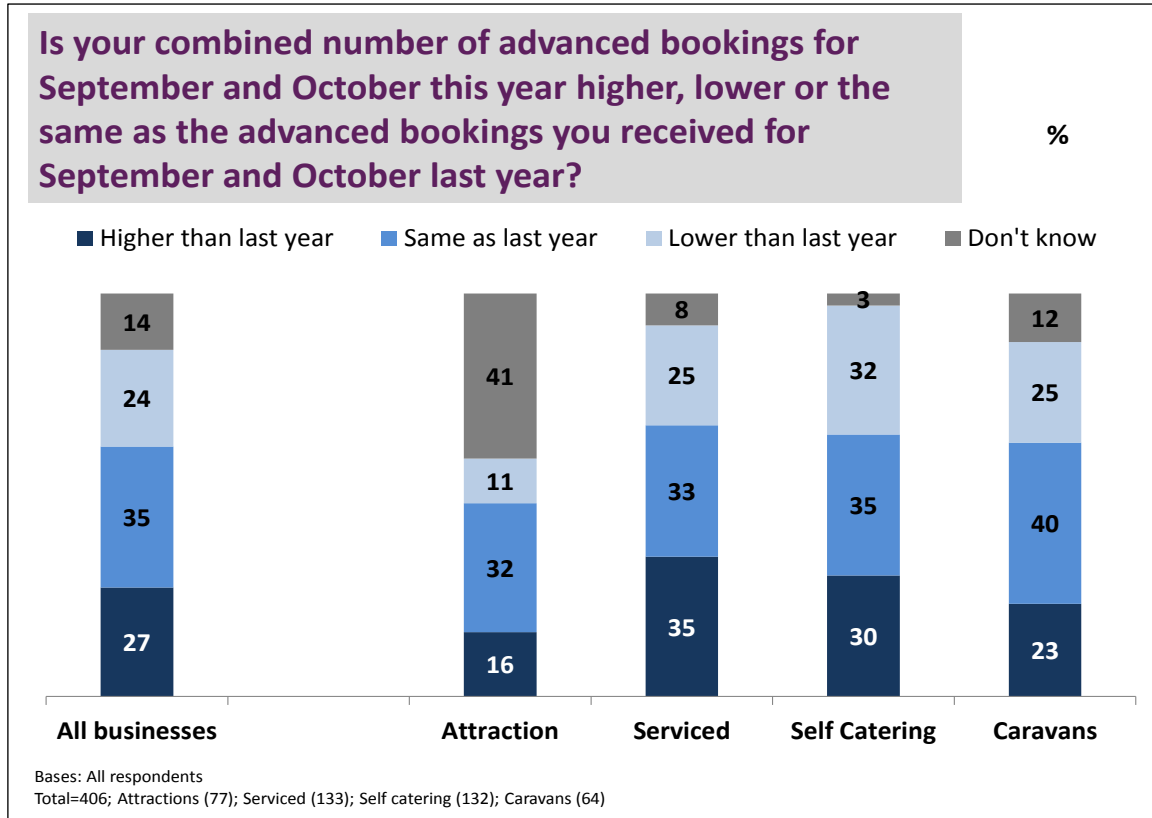
Roughly, a third of tourism businesses reported no change in advanced bookings. Saying that, 27% reported an increase in bookings, while a similar proportion reported a decrease in advanced bookings (24%).

Looking at the autumn advanced bookings by business type, just over a third of serviced accommodation business reported an increase in advanced bookings compared to last year, while fewer attraction businesses said that they had received an increase in advanced bookings (16%).

However, two fifths of attraction businesses said they did not know if they had received more advanced bookings for the autumn months, this may be because visitors are less inclined to book weeks in advanced when visiting attractions.

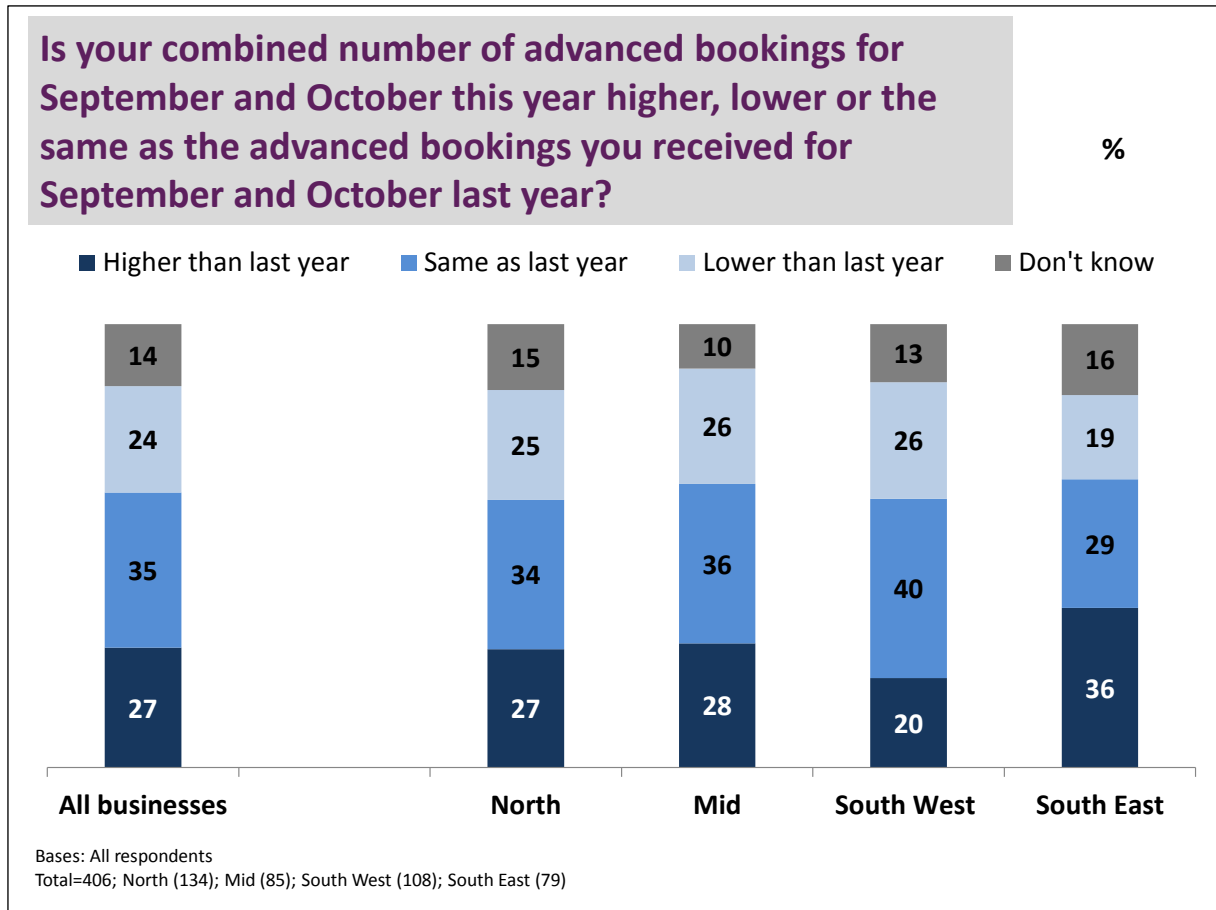
A third of self-catering businesses reported receiving fewer advanced bookings for September and October 2015 compared to the same time last year, while only 11% of attractions reported having fewer bookings – see Figure 6 for more details.

Figure 6



Looking at the autumn advanced bookings by region; (see in Figure 7 overleaf) businesses in South East Wales were more likely to report higher numbers of advanced bookings for the early autumn months than other regions in Wales. Businesses in South West Wales were least likely to see an increase in advanced bookings, with only 20% of businesses saying numbers were higher this year. Roughly a quarter of businesses across the regions in Wales reported a decrease in bookings, with the exception of South East Wales (19%).

Figure 7



Businesses that said they had received a higher number of advanced bookings for September and October were then asked why they thought advanced bookings had improved for the autumn season this year. This question was asked in order to see if businesses would spontaneously attribute this rise in bookings to the Rugby World Cup.

As can be seen from Table 5 overleaf, the businesses that had seen a rise in the number of advanced bookings for September and October were most likely to mention the Rugby World Cup (16%). Unsurprisingly, this proportion rises to 58% for businesses from the South East of the country as the games will be held in this region.

Nearly one in six also mentioned their own efforts with marketing, publicity or a new website. Businesses also believed they were benefiting from taking bookings over the internet and from using internet booking sites, such as booking.com, Airbnb and late rooms.com (9%). Some businesses also attributed their higher numbers of advance bookings to the increase in activities or events in the area or to their own efforts to improve their services or offer unique facilities (7% for each).

Table 5 below lists the unprompted reasons given by businesses as to why their numbers of advanced bookings had increased.

Table 5

Why would you say you have had more advanced bookings for September and October this year compared to last year?	% businesses
Rugby World Cup	16
More marketing / publicity and/or new website	15
More internet bookings / using booking sites	9
More activities / events in the area	7
Improved / unique facilities	7
Repeat business	6
Good reviews (on Trip Advisor)	6
More people staying in the UK / more tourists	6
Better weather	4
Business is more established	3
Increase in the number of weddings	3
Other	23
Don't know	15

Base = All those who said they have had a higher number of advanced bookings for September and October this year compared to September and October last year (113)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

Tourism businesses that said that their bookings for September and October this year did not compare favourably to last year, were also asked why they thought that was.

Two fifths of the businesses that had received fewer advanced bookings this year attributed the dip in numbers to the poor weather. This was seen as a particular problem for caravan businesses in Wales, as 55% believed that the bad weather over the summer had deterred visitors from booking in advanced for the autumn months (compared to 33% for serviced accommodation and 41% for self-catering accommodation).

Over one in eight businesses also believed that visitors were more likely to book last minute this year compared to last. Some suggested visitors might be doing this in order to get cheaper deals. Similar proportions also believed the economic climate and visitors' reluctance to spend money was also having an effect on their business (9%).

The table below details the unprompted reasons given by businesses for their lower numbers of advanced bookings this year.

Table 6

Why would you say you have had fewer advanced bookings for September and October this year compared to last year?	% businesses
Bad weather this year	39
Usually get last minute bookings	12
Economic climate / people not spending as much	9
Lack of advertising / area not being promoted enough	6
Downturn in tourism	4
Don't do online bookings / cheaper online	4
Fewer visitors after school holidays	3
Other	14
Don't know	20

Base = All those who said they have had a lower number of advanced bookings for September and October this year compared to September and October last year (98)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

Businesses were then asked whether they knew that Wales was hosting some of the games for the Rugby World Cup this year. The majority of businesses stated 'yes', they were aware of this (81%).

Businesses were then asked whether they felt the Rugby World Cup would impact on their business. Over three quarters of businesses felt that it would have no impact; 17% felt it would have a positive impact on their business, while only 4% felt that it would have a negative impact – see Table 7 for more details.

Again unsurprisingly, businesses in South East Wales were much more likely to report that the Rugby World Cup would have a positive impact on their business (51%).

Table 7

% businesses	Positive impact	Negative impact	No impact
All businesses	17	4	78
North	5	3	88
Mid	9	3	87
South West	11	4	85
South East	51	6	41

Base = All businesses (406) North (134), Mid (85), South West (108), South East (79)

Please note: This table excludes those businesses who said 'don't know'

Amongst those businesses saying the Rugby World Cup would have a **positive** impact on their businesses, 41% felt it would bring more bookings.

A further quarter of respondents said that it would bring more people to the area, and therefore as a result, their business could benefit financially. One in eight businesses felt it would have a positive impact on the country as a whole, as the Rugby World Cup would help promote Wales and generate more interest among potential visitors – see Table 8.

Table 8

Why do you think the Rugby World Cup will have a positive impact on your business? (unprompted)	% of businesses
Increase in bookings / more business	41
More people will come to the area / will make more money	26
Will help promote Wales / generate more interest	12
Increase in foreign visitors	9
Run events associated with the World Cup	8
It will attract new visitors to Wales	7
Other	18
Don't know	1

Base = all businesses that think the Rugby World Cup will positively impact their business (68)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

For businesses that said they thought that the Rugby World Cup would have a **negative** impact on their business (14 businesses), most said they were worried that visitors might be less inclined to visit their attraction / area whilst the games were on as they would rather watch the games, either at home or in the pub (12 businesses- NB very small base size) – see Table 9 overleaf

Table 9

Why do you think the Rugby World Cup will have a negative impact on your business? (unprompted)	No. of respondents
Visitors will not visit while games are on / would rather watch the games elsewhere (e.g. home, pub)	12
Other	3

Base = all businesses that think the Rugby World Cup will negatively impact their business (14)

NB very small base size

As mentioned previously, over three quarters of Welsh tourism businesses felt that the Rugby World Cup would have **no impact** on their business.

Over three quarters of these businesses stated that this was due to their location and the fact that they were too far away from the games for it to have any effect (80% in North Wales and 88% in Mid Wales).

Other comments were received by significantly smaller proportions of respondents; 10% stated that the Rugby World Cup would make no difference to their bookings because of the nature of their business and the fact that they would have no connection to sporting events, while 9% said that their customer base would have no interest in the games and therefore it would have no impact on their business – see Table 10 below for more details of the comments received.

Table 10

Why do you think the Rugby World Cup will have <u>no</u> impact on your business?	% businesses
Too far away from games / Cardiff	78
Will not affect the business / no connection to sporting events	10
No interest in this part of the country / customer base not interested	9
Know from experience / similar events (Ryder Cup) had no impact on the business in the past	2
No impact yet, may see increase in their bookings closer to the time	2
Other	4
Don't know	2

Base = all businesses that think the Rugby World Cup will have no impact on their business (317)

Please note: Businesses could give more than one reason, so the sum of percentages may exceed 100%.

3.3 Visitor Origin

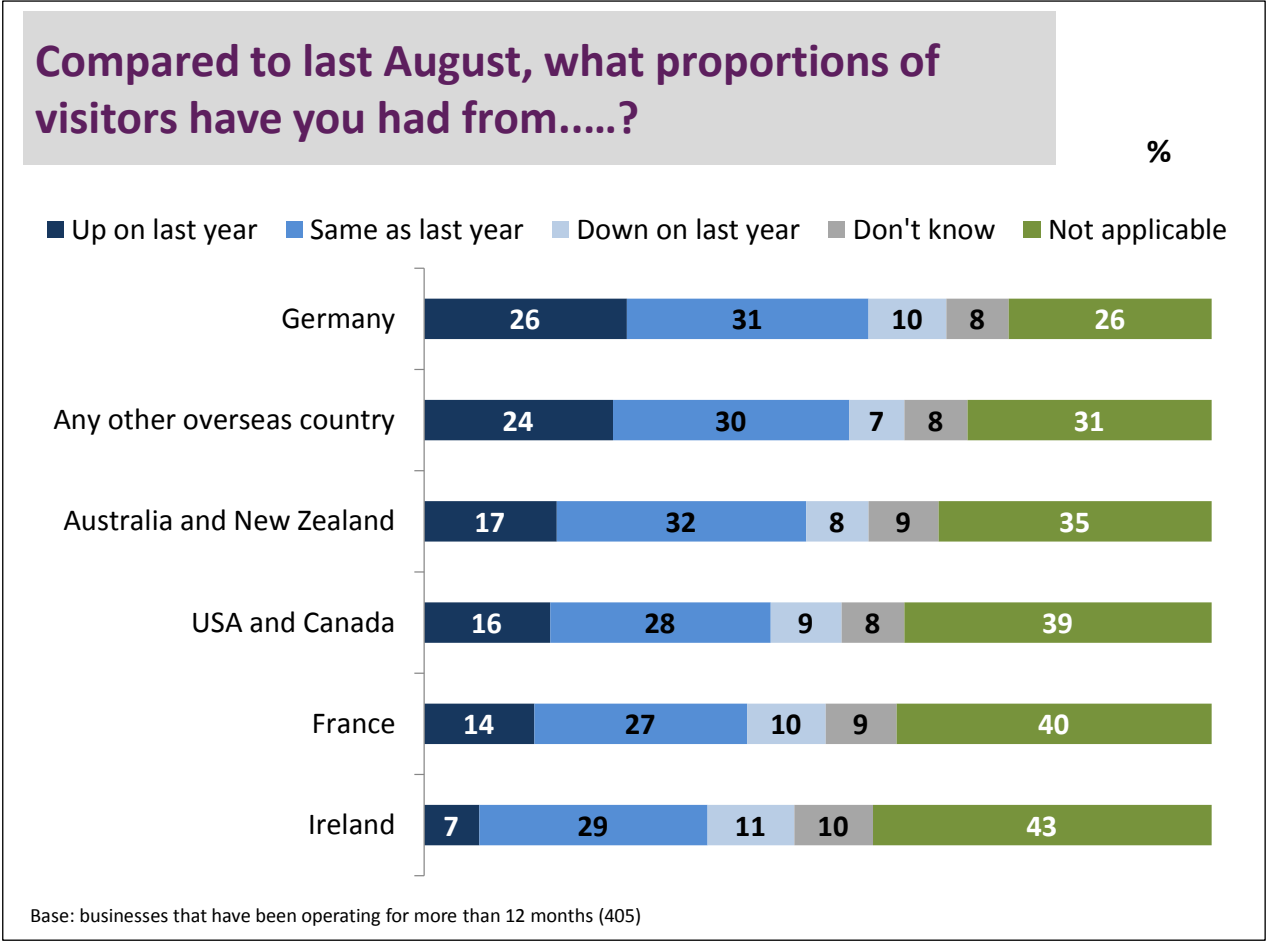
Businesses operating for longer than 12 months were asked whether the proportion of guests/visitors coming to their establishments from various countries and worldwide regions had changed over the past 12 months.

Just over a quarter of businesses reported an increase in the number of visitors from Germany compared with 2014, whilst another quarter had seen an increase in visitors from 'other overseas countries'. One in six businesses reported an increase from Australia and New Zealand, and USA and Canada (17% and 16% respectively), while slightly smaller proportions had seen an increase in French visitors (14%). Only 7% had seen an increase in the number of visitors from Ireland.

In South East Wales, 30% of businesses reported increases in visitors from Australia and New Zealand and 27% of businesses in the region reported increases in American and Canadian visitors. More businesses in this area had noticed an increase in visitors coming from these countries which might be connected to the Rugby World Cup.

However, relatively large proportions of businesses did not receive visitors from these countries – see Figure 8 overleaf for more details.

Figure 8



APPENDIX

Survey Questionnaire

VISIT WALES BUSINESS TOURISM – WAVE 2
FINAL QUESTIONNAIRE (24TH AUGUST 2015)

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 the August last year, how many guests/visitors have you had this August?

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

Visit Wales TV advertising

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 August, how would you describe the overall turnover for August this year?

READ OUT – SINGLE CODE

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

RUGBY WORLD CUP

ASK ALL

Q6 Would you say the combined number of advanced bookings you have received for September and October this year is higher, lower or the same as the advanced bookings you received for September and October last year?

READ OUT – SINGLE CODE

Higher than last year → **Q7a**
Lower than last year → **Q7b**
About the same as last year → **Q8**

Don't know → **Q8**

ASK IF CODED 1 (HIGHER) AT Q6

Q7a Why do you think this is?

RECORD VERBATIM

Don't know

ASK IF CODED 2 (LOWER) AT Q6

Q7b Why do you think this is?

RECORD VERBATIM

Don't know

ASK ALL

Q8 Did you know that Wales will be hosting some of the games for the Rugby World Cup this year?

Yes

No

Don't know

Q9 Do you think that the Rugby World Cup will have a positive or negative impact on your business, or have no impact at all?

READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

1. A very positive impact
2. A slightly positive impact
3. No impact
4. A slightly negative impact
5. A very negative impact

Don't know

ASK IF CODED 1 OR 2 AT Q9 (POSITIVE IMPACT)

Q10a Why do you say that?

RECORD VERBATIM

Don't know

IF CODED 3 AT Q9 (NO IMPACT)

Q10b Why do you say that?

RECORD VERBATIM

Don't know

IF CODED 4 OR 5 AT Q9 (NEGATIVE IMPACT)

Q10c Why do you say that?

RECORD VERBATIM

Don't know

VISITOR ORIGINS

ASK ALL BUSINESSES THAT HAVE BEEN OPERATING LONGER THAN 12 MONTHS

READ OUT - Looking now at the place of residence of your visitors.

Q11 How have your proportions of visitors / advanced bookings from **INSERT FROM LIST** been this summer compared to summer 2014?

READ OUT – SINGLE CODE – INVERT SCALE BETWEEN RESPONDENTS

Up on last year

The same as last year

Down on last year

Don't know

Not applicable – do not receive visitors from
(Wales, UK outside Wales, Republic of Ireland,
Germany, USA, Any other overseas countries)

LIST

Ireland

France

Germany

USA and Canada

Australia and New Zealand

Any other overseas countries

CORE QUESTIONS

Q12 Which of the following best describes your location?

READ OUT – SINGLE CODE

Seaside

Urban

Inland

Don't know

Q13 How confident are you for the autumn season?

READ OUT – INVERT SCALE BETWEEN RESPONDENTS

Very confident

Fairly confident

Not very confident

Not at all confident

Don't know

Q14 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.