

Wales Tourism Business Barometer

Wave 2, June 2019

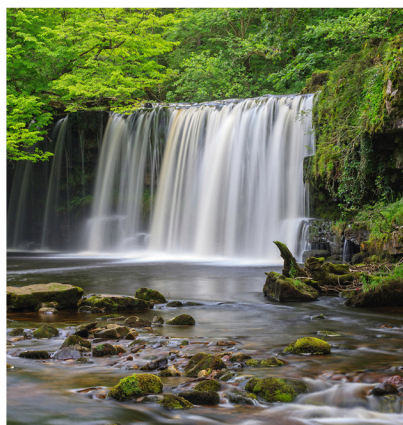
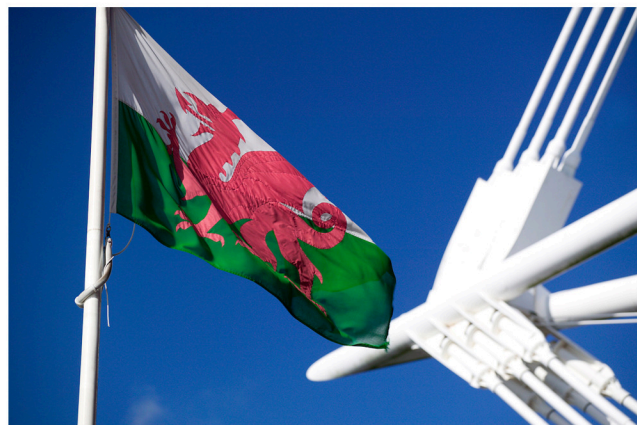


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Wales Tourism Business Barometer: Wave 2, June 2019

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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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1. Headline Findings

Steady period for the industry

- 1.1 Most (83%) businesses have increased or maintained their visitor levels during May/June half term. Among those reporting an increase in visitors, a third (32%) cite the weather as a reason. However, the weather is also cited as a key factor on performance among a third of those reporting fewer visitors.
- 1.2 Repeat business has brought stability to the industry during this period. Three in ten (30%) of those seeing increased visitors cite this as a key factor.

Restaurants / pubs / cafes benefitting from their own marketing

- 1.3 Restaurants, pubs and cafes in areas of high tourism footfall are the best performing sector, with about two in five (39%) serving more tourist customers than the same period last year. About a third (31%) of these attribute the increased custom to their own marketing.
- 1.4 The self catering sector has been the most challenged in terms of increasing visitor levels. The most common reason for seeing decreased visitors in this sector is 'Brexit uncertainty', as this affected advance bookings.

Brexit impacts more than just European markets

- 1.5 In this wave, we have asked questions specifically on the impact of Brexit.
- 1.6 Over half (56%) of businesses expect that Brexit will have no impact on European visitors in 2019, but most of the remainder (37%) expect a negative impact. Some businesses are already seeing a significant fall in European visitors due to the uncertainty.
- 1.7 The overseas impact is not limited to European visitors though. Some (28%) businesses also expect a negative impact on visitors from outside Europe.
- 1.8 Views on the UK market are mixed. Some (13%) businesses expect a negative impact this year because of Brexit causing a general lack of confidence in spending. However, this is more than offset by the proportion (23%) of businesses expecting a positive impact. The main reasons (linked to Brexit) are the potential hassle / uncertainty of travelling abroad and the weak value of the pound.
- 1.9 Among businesses which expect an impact on any of the markets (UK / Europe / Outside Europe), the vast majority (88%) are doing nothing to prepare.

Expectations of better times ahead

- 1.10 Following a steady period, businesses in all sectors are confident about the coming summer season. 29% are 'very confident', and a further 56% are 'fairly confident'.

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 May/June half term holiday period in 2019, with measurements also of expectations for the summer. We have also asked questions specifically on the impact of Brexit.

How is the Survey conducted?

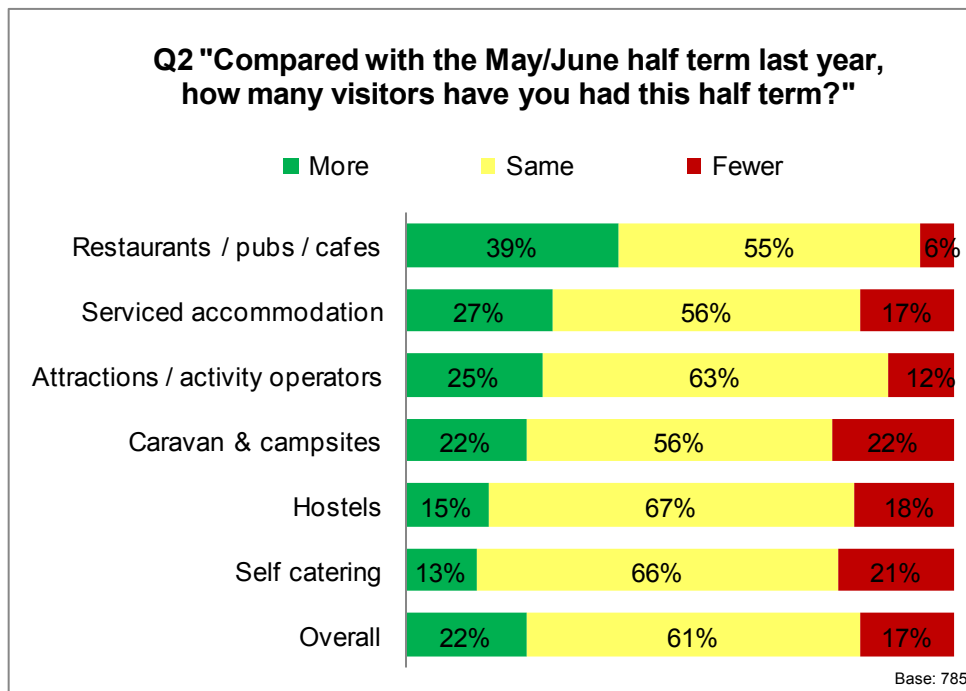
- 2.3 We have conducted 827 interviews by telephone. This makes results of questions asked to everyone accurate to $\pm 3.4\%$. The sample is reflective of the tourism industry in Wales and is shown below by sector and region:

Sector / Region	North	Mid	South West	South East	Total
Serviced accom	106	39	76	58	279
Self catering	100	48	93	36	277
Caravan / campsites	38	14	22	5	79
Hostels	7	14	8	5	34
Attractions	25	13	20	29	87
Activity operators	14	5	11	3	33
Restaurants / pubs / cafes	8	12	9	9	38
Total	298	145	239	145	827

- 2.4 About three quarters (74%) of businesses in the sample are currently graded by Visit Wales, and 26% 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 June. A copy of the questionnaire used is included as an appendix.

3. May/June Performance

Performance by Sector



Steady period for the industry

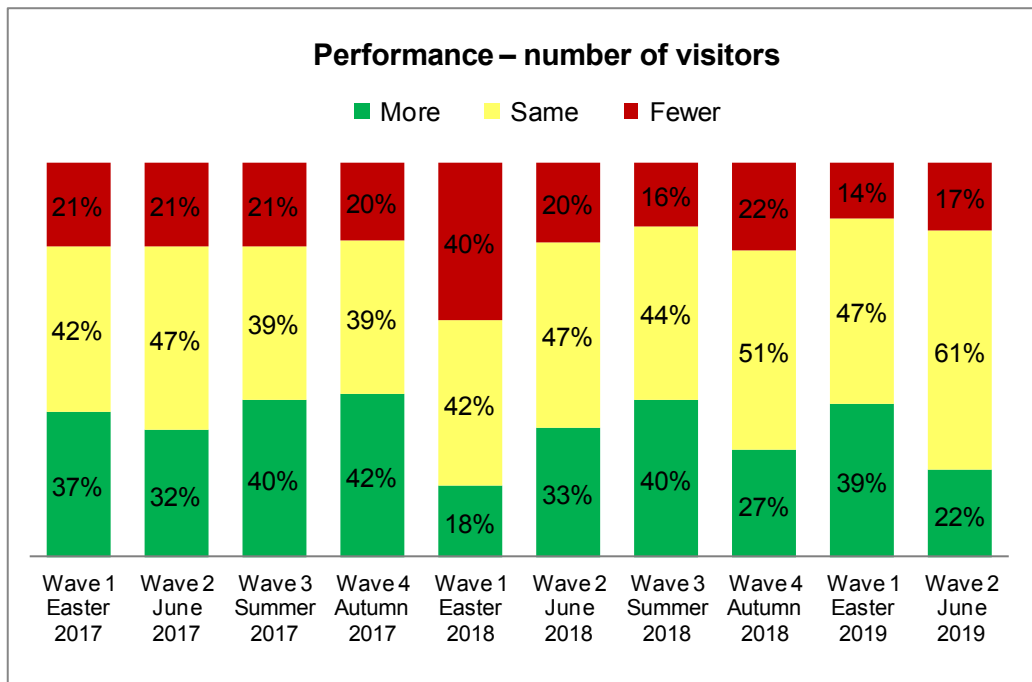
- 3.1 Most (83%) businesses have increased or maintained their visitor levels during May/June half term. Restaurants, pubs and cafes in areas of high tourism footfall are the best performing sector, with about two in five (39%) serving more tourist customers than the same period last year. About a third (31%) of these attribute the increased custom to their own marketing.
- 3.2 The serviced accommodation sector and attractions / activity providers are also up on balance. Repeat business is a key factor in serviced accommodation, cited by two in five of those who are up. Attractions & activity providers are more weather dependent, and two thirds of those who are up cite the weather as a factor.

"Weather is the main factor for our business"
Attraction, North

- 3.3 The self catering sector has been the most challenged in terms of increasing visitor levels. The most common reason for seeing decreased visitors in this sector is 'Brexit uncertainty', as this affected advance bookings.

"Fewer visitors from Europe. Brexit has already had an impact."
Self catering, South East

Performance Trend

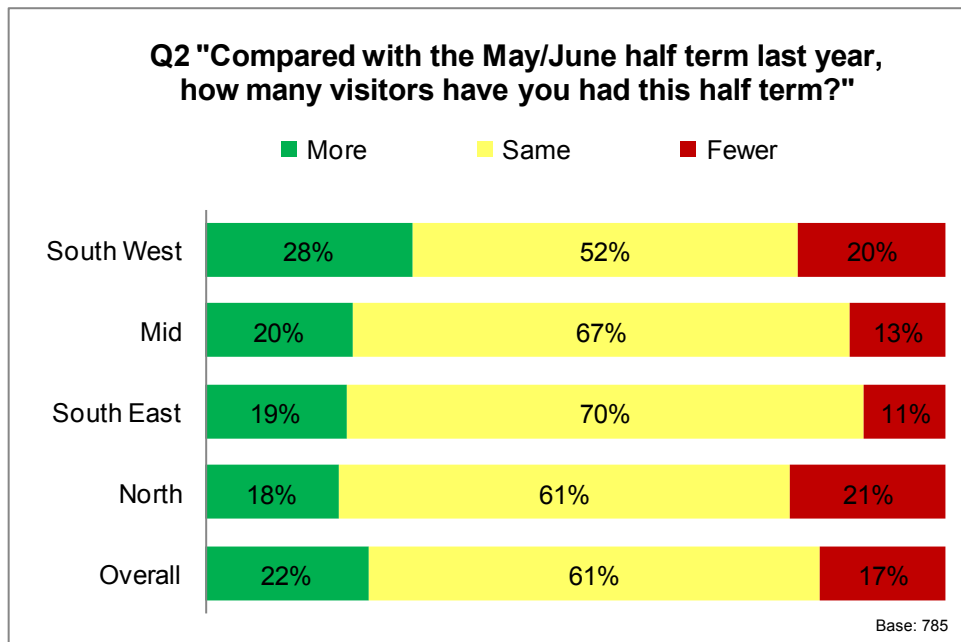


Stable performance on the back of a good period last year

- 3.4 While performance this May/June half term is steady, with a minority of businesses increasing their visitor levels, comparisons are made with a very good equivalent period in 2018.

“Last year was absolutely sensational”
Serviced, North

Performance by Region



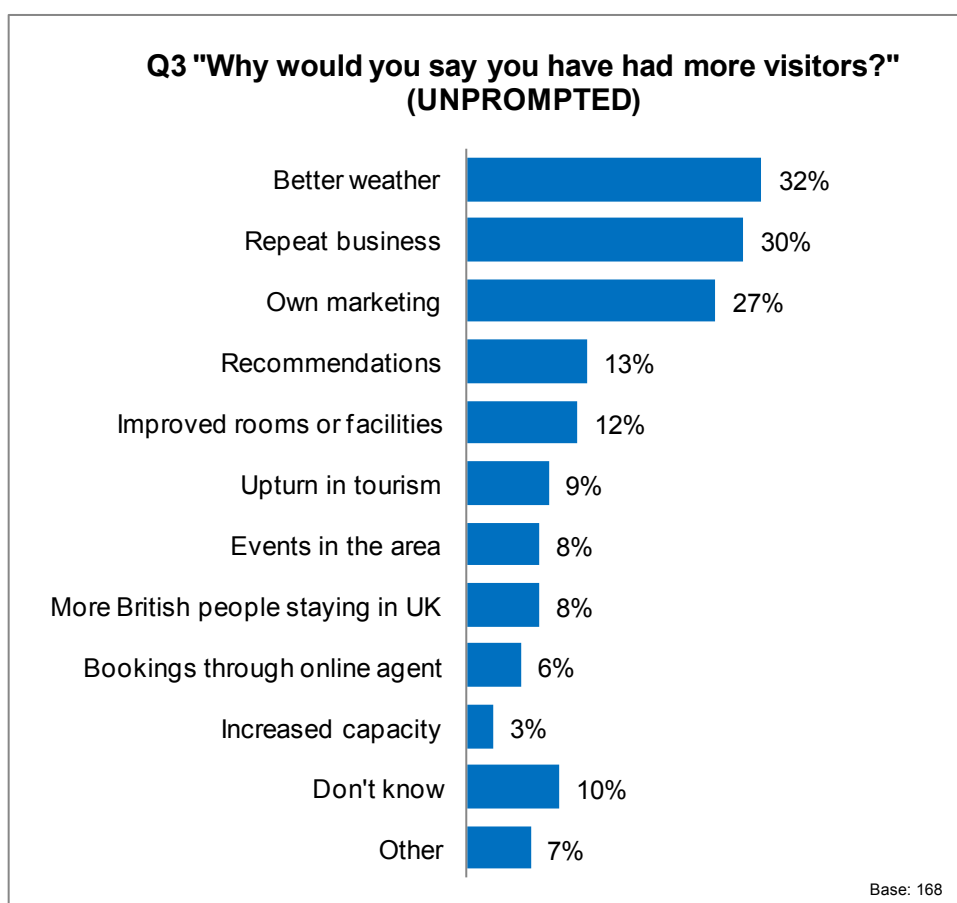
Consistent picture across the four regions of Wales

- 3.5 Overall industry performance is reflected across the four regions of Wales (North, Mid, South West, South East). In each region, the majority of businesses report the same level of visitors as the same period last year.
- 3.6 The region with the highest proportion (28%) of businesses reporting to be up is the South West. Numerous reasons are given for this, including better weather (cited by 35% of businesses which are up), repeat business (29%), own marketing (27%) and recommendations (27%).

"Bookings from all over the world are coming in"
Serviced, South West

"People are changing the way they holiday so we are changing how we market our business to attract more customers"
Self catering, South West

4. Reasons for Increased Visitor Levels



Mixed weather, but good for some businesses on balance

- 4.1 Among those reporting an increase in visitors, a third (32%) cite the weather as a reason. However, the weather is also cited as a key factor on performance among those reporting fewer visitors (discussed later in Section 5). Many parts of Wales experienced a mixture of sunshine and rain during the week and so the effect of the weather has been quite specific to timing, location and type of business.

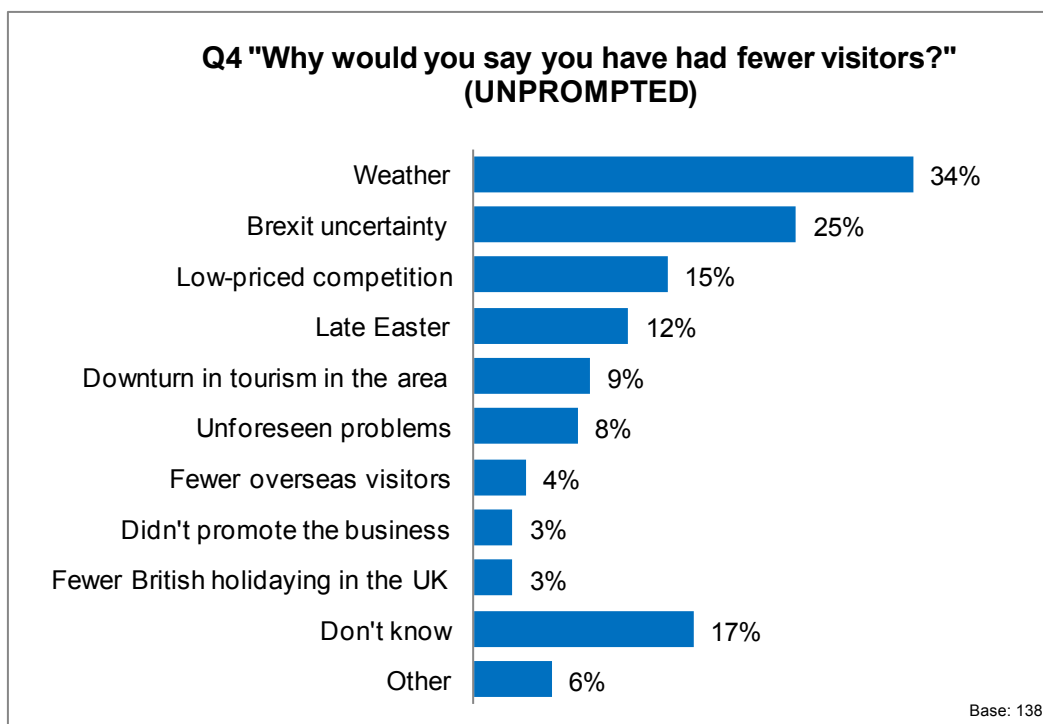
"We have had more visitors – we are very weather dependent"
Attraction, South West

Importance of repeat visitors

- 4.2 Three in ten (30%) operators experiencing increased business cite repeat visitors as a factor. Operators often talk about the importance of attracting visitors back again.

"Advance bookings are going very well this year – repeat visitors are a key factor"
Serviced, Mid

5. Reasons for Decreased Visitor Levels



Mixed weather has not helped some

- 5.1 As mentioned under reasons for increased visitors, the weather has been quite specific to timing, location and type of business.

"Weather is the most important factor for the business. Good weather brings more visitors, but it wasn't so good here."
Attraction, North

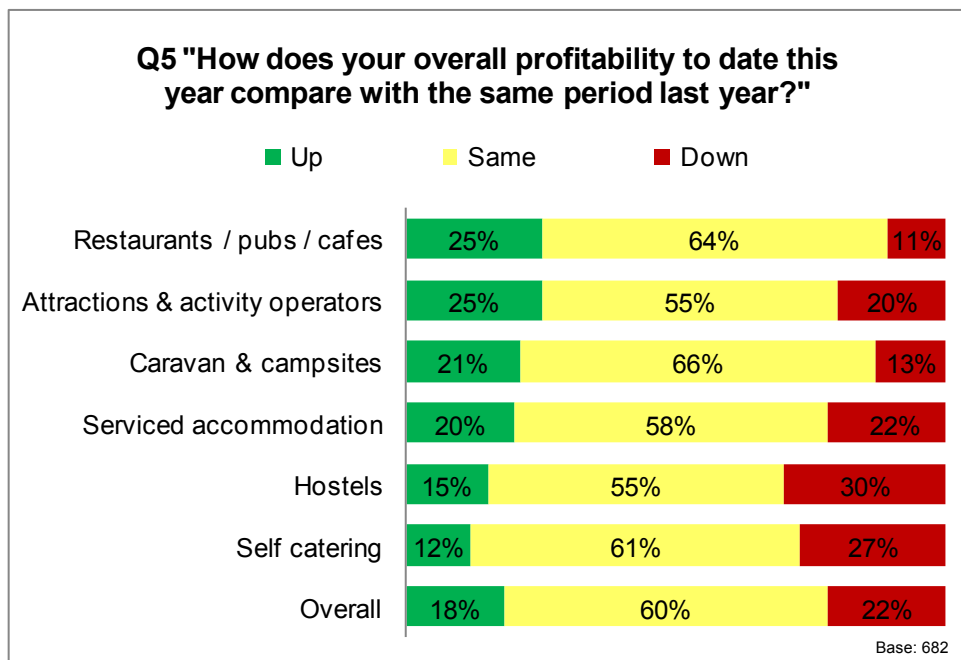
Brexit simmering

- 5.2 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.
- 5.3 While the turbulence has momentarily reduced to a simmer, some businesses are feeling the knock-on effects of not as many advance bookings being made in the spring.

"Advance bookings are going very slowly and are down on last year because of Brexit uncertainty"
Serviced, Mid

"People not holidaying as much due to uncertainty about how Brexit is going"
Self catering, South West

6. Profitability



Profitability is being squeezed in some sectors

6.1 Retaining profitability is a challenge in the accommodation sector at the moment. Some report rising costs, while at the same time others say that market conditions don't allow them to increase their prices. The rise of Airbnb has had a significant impact on a number of operators, especially self catering.

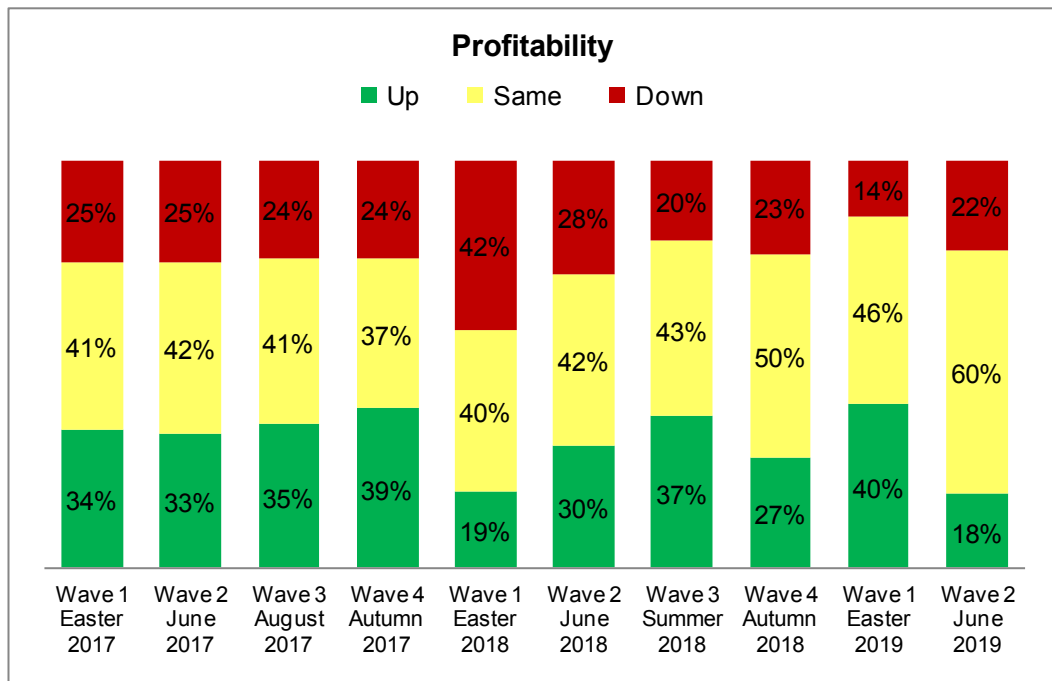
"People are going for the bottom of the market. Airbnb has also made things really bad."

Self catering, North

"We had to put our prices down for half term so less profit, and we are only booked for two weeks this summer so will have to put our prices down again I fear"

Self catering, North

Profitability Trends



Profitability under pressure for the first time in more than a year

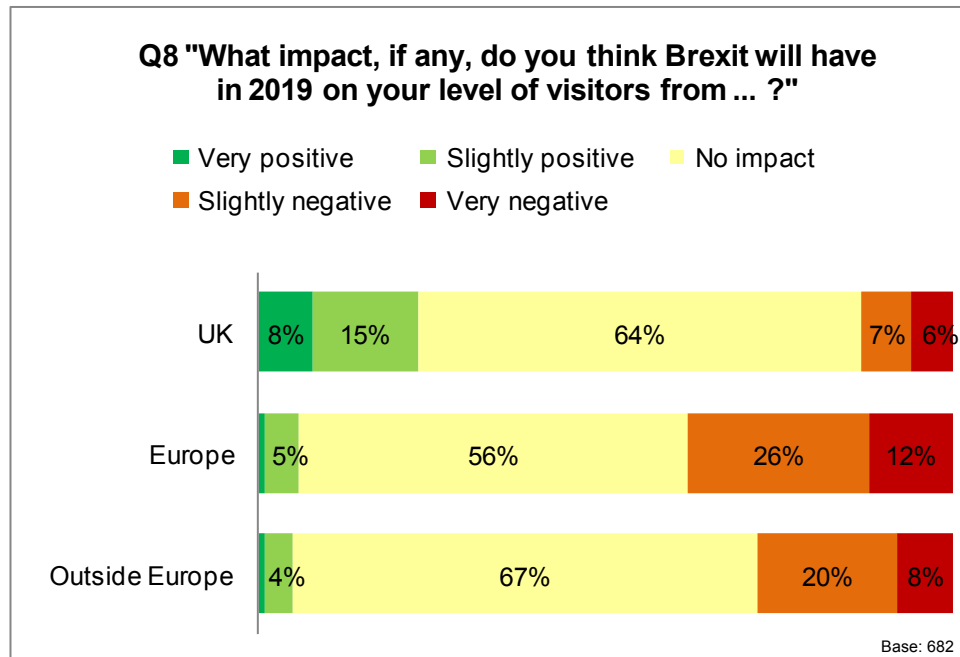
6.2 The industry had enjoyed a number of periods of operators reporting quite healthy profitability. At the moment, operators seem to be a bit more under pressure again for the first time since the poor start to 2018.

“We have been just as busy but profits are down as the rates have shot up”
Hostel, Mid

7. Impact of Brexit

7.1 In this wave, we have asked questions specifically on the impact of Brexit.

Impact on Visitors by Market



Brexit impacts more than just European markets

7.2 As indicated in the previous Barometer wave post-Easter, some operators are seeing a decline or expect to see a decline in visitors from Europe (outside UK). The impact is likely to be felt most strongly in South East Wales, where about two thirds (65%) of businesses expect a negative impact on European visitors.

"Two groups of German visitors who were booked for one week have each cancelled. The reason given was Brexit."

Self catering, South West

"We used to have companies from Italy and Germany coming over and renting the barn, but since Brexit, things have completely dried up. We don't see European visitors anymore."

Self catering, South West

"A massive drop in European visitors by a third to a half and it's all due to uncertainty over Brexit. We have repeat visitors from Bavaria who have told us that people are scared of visiting Britain due to uncertainty of how they will be welcomed."

Self catering, South West

"Definitely fewer visitors from Europe already"

Serviced, South East

- 7.3 However, the overseas impact is not limited to European visitors. Some (28%) businesses also expect a negative impact on visitors from outside Europe. The impact is likely to be felt most strongly in South East Wales, where nearly half (46%) of businesses expect a negative impact on visitors from outside Europe.

“Much fewer Americans and Chinese than we’ve previously seen”
Serviced, North

“We’ve seen a lot of cancellations by visitors from Europe and further afield this year already”
Serviced, North

- 7.4 Research undertaken for Visit Wales with the overseas travel trade earlier this year indicated that some consumers are uncertain about how Brexit might change their own country’s relationship with the UK. Also, pictures of Brexit demonstrations have been seen by other countries. For nations less familiar with the UK such as China, this can cause them to doubt their safety.

“More perceived barriers to travel to the UK”
US tour operator (taken from Visit Wales travel trade research, 2019)

“Security problem – social media report protests against Brexit. The Chinese don’t know whether it is still safe to visit the UK.”
Chinese tour operator (taken from Visit Wales travel trade research, 2019)

UK market: hassle & cost of going abroad vs general spending uncertainty

- 7.5 Views on the UK market are mixed. Some (13%) businesses expect a negative impact this year because of Brexit causing a general lack of confidence in spending.

“Everything is up in the air. People are cautious about what they are spending. More people are booking shorter breaks.”
Self catering, South West

“People are holding onto their money to see what will happen”
Self catering, South West

- 7.6 However, this is more than offset by the proportion (23%) of businesses expecting a positive impact. The main reasons (linked to Brexit) are the potential hassle / uncertainty of travelling abroad and the weak value of the pound.

“I think more people are staying in the UK because the exchange rate is so bad”
Serviced, North

“More visitors are expected from all parts of the UK this summer”
Serviced, South East

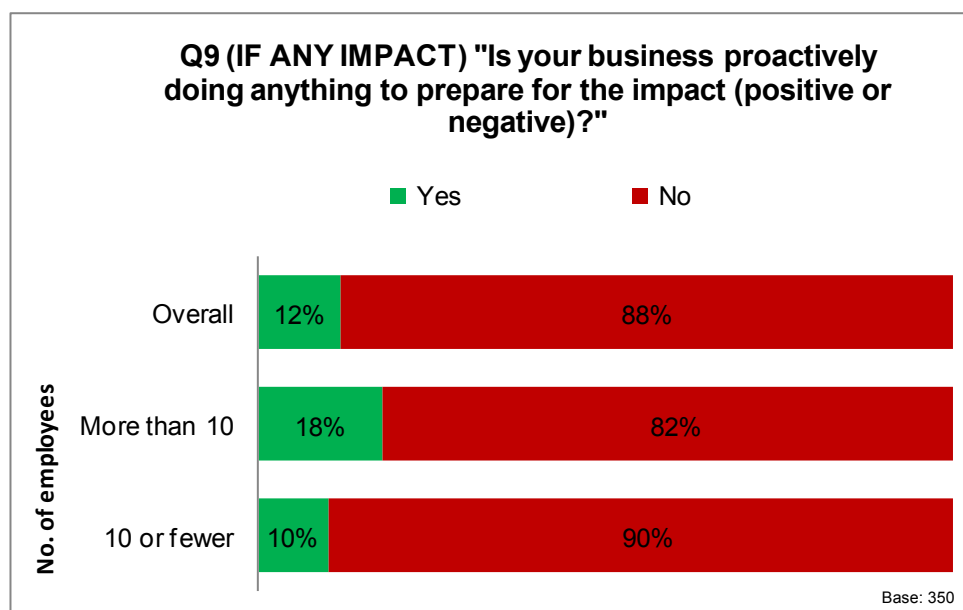
For each market, the majority of businesses expect no impact

7.7 In spite of many strong comments about overseas markets declining because of Brexit, it is worth noting that for every market (UK / Europe / Outside Europe), the majority of businesses expect no impact.

"I think it's all a load of rubbish and won't impact us at all"
Serviced, North

"Still a lot of visitors from Europe coming. Brexit has had no impact on the bookings so far."
Serviced, South West

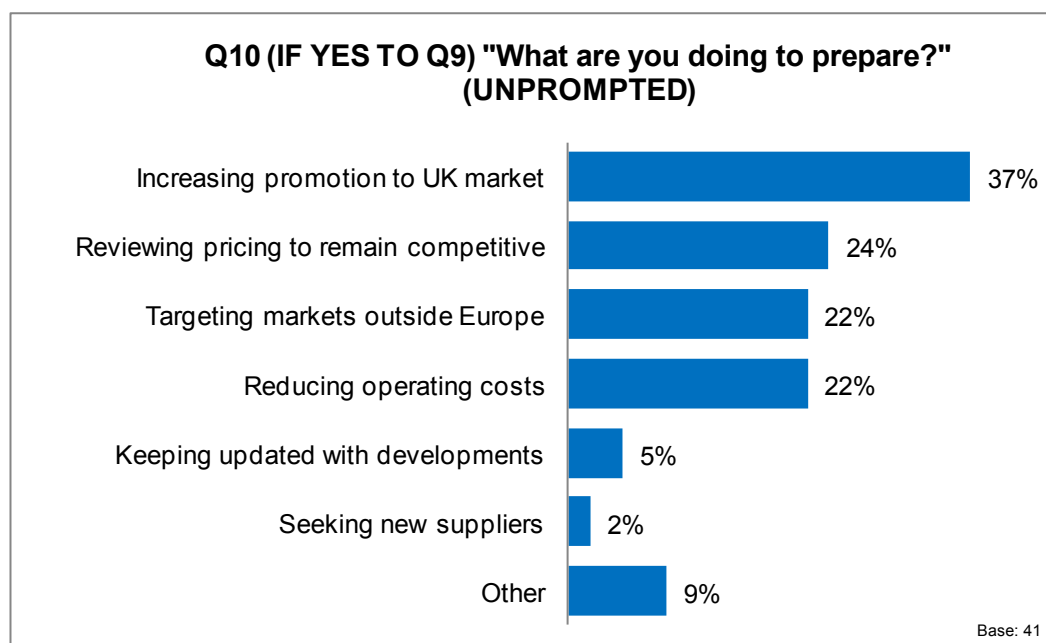
Preparing for the Impact



Most businesses are doing nothing to prepare for the impact

7.8 Among businesses which expect an impact on any of the markets (UK / Europe / Outside Europe), the vast majority (88%) are doing nothing to prepare. This is more so the case among micro-businesses.

"No idea what to do to prepare for Brexit"
Serviced, South East



Increasing promotion to UK market

7.9 According to the results of Q8 discussed previously, Brexit is expected to have a net positive impact only on the UK market. Some operators recognise this and so are proactively increasing their promotion in the UK, especially using social media.

"More adverts planned on social media and booking websites"
Serviced, South East

Promotion to other markets

7.10 Other businesses are targeting markets outside Europe, or some just say they are increasing their marketing generally across all markets, especially using social media.

"We are trying to use more adverts on social media to attract more visitors, especially from USA and Canada"
Self catering, South East

"Marketing campaigns by using social media especially"
Self catering, South East

Lowering prices

7.11 About a quarter (24%) of businesses expecting an impact say they are reviewing their pricing to remain competitive. Although they benefit in the short term, it is concerning how long they can sustain this given the profitability pressure that the accommodation sector is already under.

"We've seen a massive drop in European visitors and beyond. We're lowering prices and looking at other websites to try and entice visitors."
Serviced, North

Impact on Staffing

Q14 (IF ANYONE EMPLOYED) “How, if at all, has Brexit impacted on staffing at your business?” (Unprompted)	
Positive impact	0%
No impact	77%
Negative impact – difficulties in recruiting new employees	6%
Negative impact – difficulties in retaining existing employees	2%
Negative impact – other reason	2%
Don’t know	13%

Base: 557

Limited impact of Brexit on staffing

7.12 Two thirds of businesses employ staff other than the proprietors. Of those, only one in ten (10%) say that Brexit has impacted on staffing. By far the most common reason given for there being no impact is that all staff are recruited locally.

“We only employ local people so Brexit is having no effect”
Self catering, South West

“Staff are all British”
Serviced, South West

Brexit makes an already difficult recruitment task harder for some

7.13 Some businesses say that recruiting in the hospitality industry is already difficult. Brexit may well make it even harder. South East Wales seems to be the most affected region – 14% of businesses which employ anyone say that Brexit has impacted on recruiting new employees.

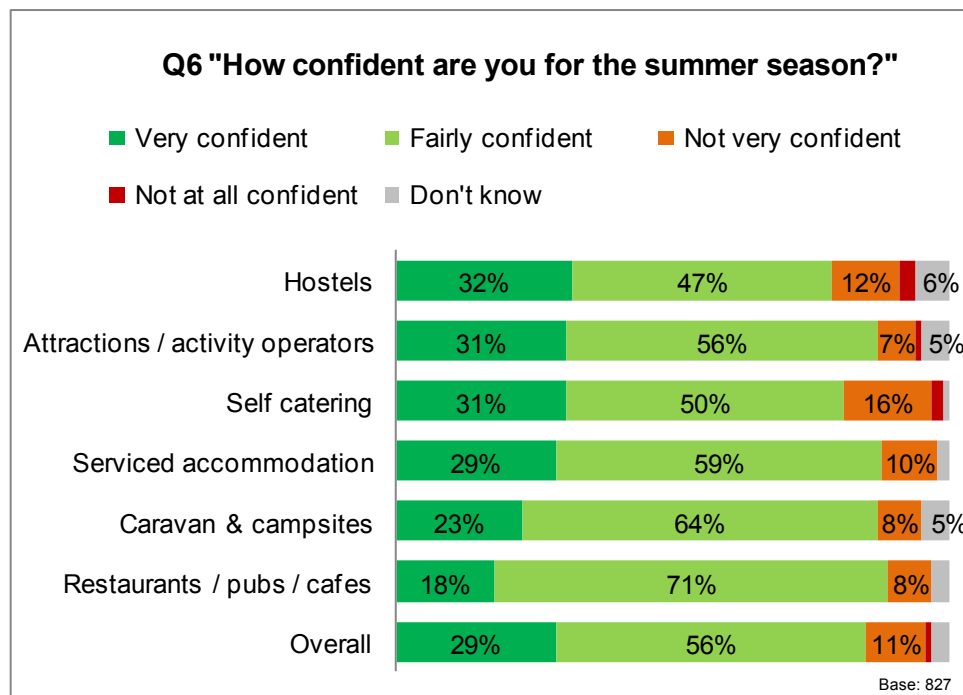
“It’s already difficult to recruit staff. After Brexit it will get even worse.”
Serviced, South East

“European staff are already more difficult to find in the area”
Attraction, South West

“Recruiting volunteers, especially students on EU placements, has been affected”
Attraction, South West

8. Confidence for the Summer

Confidence by Sector



Busiest season coming up

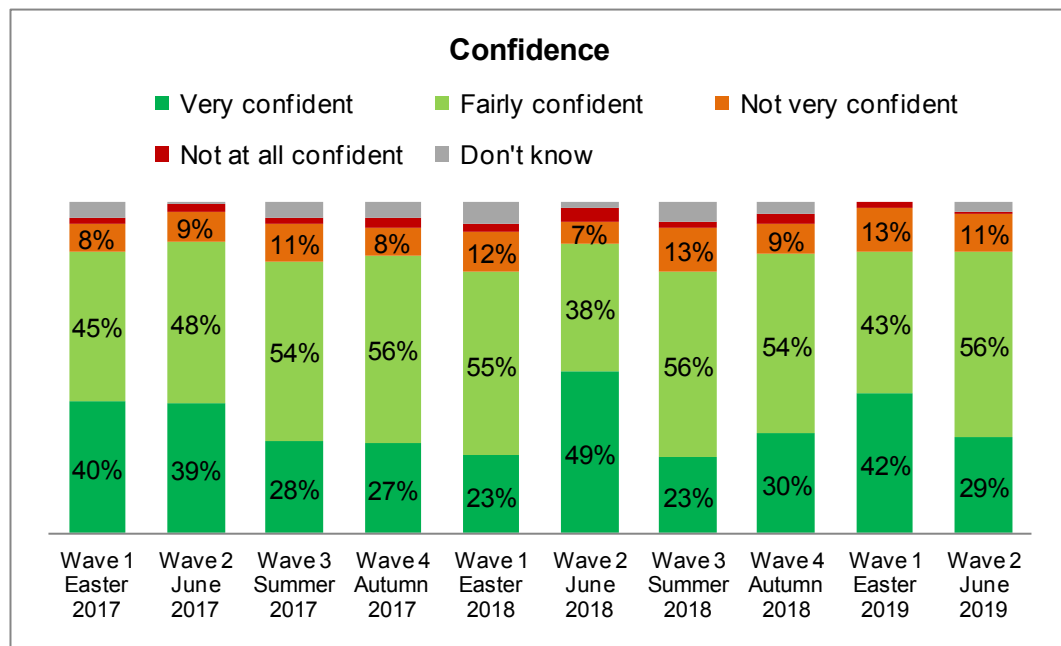
- 8.1 Following a steady period, businesses in all sectors are confident about the coming summer season.
- 8.2 The tone of some operators is that they can't be anything other than confident about their most important season.

"Summer is the most important season for the business"
Restaurant, South East

"The summer season is the most important – high expectations"
Attraction, South West

"June is terrible, but bookings for July and August are going very well"
Self catering, Mid

Confidence Trend



Confidence not so high for the time of year

8.3 Compared to this time last year, confidence going into the summer is a little subdued. However, May/June last year was a very good period including plenty of sunny weather and this impacted greatly on confidence at the time.

“Lots of coaches coming in and as long as the weather is good, we’ll be laughing”
Attraction, North

9. Qualitative Findings

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

Performance over May Half Term

A good half term for some...

- 9.2 Stakeholders in the activities and attractions sector report experiencing a good May half term.

“Visitor figures were pretty good. In 2018 for half term it was just under 73,000 and for this year it was just over 74,000.”

“It’s been good. Members are all saying that business is good and is as good as previous years.”

- 9.3 One stakeholder in the activities sector believes that performance continues to be good as a result of the product and what it has to offer to visitors.

“The product is there; it’s a well-known product in terms of the outdoor offering and the activities that come with it ... there’s not been a downturn, which is always a good thing.”

- 9.4 Another stakeholder experiencing a good period suggests that it is the work of new installations at some of the sites that has brought on an increase in visitors.

“One of the sites has had a new installation which has seen a surge in visitors. Other sites have had new installations too, which might have brought people back who haven’t been to the sites for a year or two.”

... but a quieter time for others

- 9.5 Not all report experiencing a positive half term. Some report that May and the half term has been quieter than what they were expecting.

“Overall, I’m finding quite a number of businesses have been quieter than they’d expect ... occupancy is well down, quite substantially down in some cases.”

“May has been a bit quiet, [it’s] the quietest May since I’ve been here in the last five years.”

- 9.6 One suggests that Easter being so late in the year and so close to the May bank holidays may have caused a drop in performance.

“I think the date of Easter itself might have affected that, because it was so close to the first May bank holiday.”

Brexit Impact and Measures

Hopes have fallen for the domestic market

- 9.7 At the beginning of the year, some stakeholders were hopeful that Brexit and its uncertainty would have a positive impact on the domestic market. However, based on their performances so far this year, their sentiment has changed.

“We were hoping this year, with all the Brexit uncertainty, that we would have seen a positive impact on the domestic market ... I thought, more people would take short breaks or holidays in the UK ... but I don’t feel I’m seeing that trend. I was expecting a good year this year.”

“I thought it might have a positive impact on UK staycations, but it’s not. The first date in March, there were no bookings because nobody knew what was going to happen ... I think it’s having a detrimental effect. I think it’s why I’m not seeing any Europeans, but also, I think people just aren’t spending any money because they don’t know what’s going to happen.”

Some aren’t concerned, and some aren’t sure

- 9.8 One of the stakeholders claims that they are not overly concerned with Brexit and believes that it should not make a difference to performance for themselves or their members, as a result of the sector being a ‘well-known product’. They also note that Brexit could have a positive impact with European markets, depending on the strength of the pound compared to the euro.

“I genuinely believe that it’s not going to make a difference ... members don’t see there will be any significant change in the way they function as a business, or any change in the way of the visitors who come to them. Arguably, it could be cheaper for the European visitors on the basis of where the pound is against the euro, so it could be beneficial.”

- 9.9 However, another is unsure how Brexit will impact their members’ visitor figures, especially as the majority of their visitors are from the UK. They speculate that it may impact the outdoor attractions properties that receive European visitors via coach tours.

“It’s difficult to say at this stage ... some properties get a lot of overseas visitors via coaches, it might impact them, but the bulk of our visitors are domestic ... so, it shouldn’t have a huge impact with a reduction in European visitors.”

Not many measures put in place for a Brexit impact

- 9.10 Many stakeholders reveal that they have not put any measures in place to prepare for an impact from Brexit. This is consistent with the quantitative findings.

- 9.11 One doesn't know what could be done to prevent an impact. They do acknowledge that they could try to target the UK with more marketing, but ultimately believe that they will have to 'wait and see' before implementing any measures.

"Well, what can I do? There's not a lot I can do. I can try and market to the UK more, as I think that's where it'll be as people will stop going to Europe ... it's more of a wait and see."

- 9.12 Another suggests that it's too early to put any Brexit measures into place. However, they are unsure of whether there are discussions of Brexit measures in the central office.

"Not at this stage, it's probably still too early. We may get guidelines from the central office this year, but I don't know."

- 9.13 One stakeholder also admits to not putting anything in place because of their belief that Brexit will not have an impact. They also believe that the majority of their businesses (who are micro-businesses) are in the same position. However, they feel that the larger companies within the group who have business opportunities may have implemented something.

"The majority of our businesses are micro-businesses, and none of those would have put anything in place. It's possible that the larger members who have business opportunities outside of the UK will have put something in place to accommodate that, but I can't say for certain."

Brexit and impact on staffing

- 9.14 Only one of the stakeholders appears to be concerned about the impact Brexit could have on staffing. They believe that it could have a negative impact as it is increasingly difficult to recruit staff. They also believe that any European members of staff may move elsewhere.

"There's a lot of concern about that. It's increasingly difficult to get staff. What we're seeing is some of the European workers have got other places they could work – they don't have to work in the UK. You may be losing the better end of your staff."

- 9.15 However, others are not as concerned. They believe that there will be no impact due to businesses only employing workers who live locally. This is consistent with the quantitative findings.

"Not for me as I don't employ anyone. In our area, most of our staff are locally based."

"I don't think it would affect staffing for those who offer activities... The majority, if not all of the employees I see within the organisations are British or British citizens."

Confidence for the Summer

Some caution around Brexit, but there's hope for good weather

- 9.16 Only one stakeholder isn't feeling as confident as they were at the start of the year. Their confidence has fallen mostly due to Brexit uncertainty.

"If you asked me four months ago, I was very positive, but I'm less positive now. Primarily I think it's Brexit. We still don't know and there's so much uncertainty."

- 9.17 One is feeling cautious going forwards for the summer, mostly because of Brexit. However, they do add that the weather is also another factor that largely influences performance over the summer.

"I'd say I'm okay. I'm not overly confident or particularly pessimistic. It's mostly Brexit, and also the weather has such an effect on tourism. If there's weather like last year then I'll be selling out, but not if it's raining."

- 9.18 Others dependent on the weather are also hopeful that the summer will bring similar weather to last year.

"A lot of the time it comes down to the weather which will determine how well we do. We had a good Easter, and we're quite above where we were this time last year. We are 12% up year to date."

"I'm eternally optimistic in one sense, but the reality is the sector is vibrant and I think it's going to continue to improve throughout the year. Last year was great and the weather was just as good which makes a massive difference. There's every chance it's going to be as good as last year, if not better."

Wales Tourism Business Barometer

June 2019

Sector

Sector

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

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

- Yes ☐ Go to Q2
- No ☐ Go to Q6

Q2 Compared with the May/June half term last year, how many visitors have you had this half term?

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

Q3 Why would you say you have had more visitors? (UNPROMPTED, TICK ALL THAT APPLY)

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

Please specify other

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

- Late Easter ☐
- 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 How does your overall profitability to date this year compare with the same period last year?

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

Q6 How confident are you for the summer season?

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

Q7 *Interviewer: record all useful comments on performance this half term, particular markets or confidence for the summer.*

Q8 What impact, if any, do you think Brexit will have in 2019 on your level of:

- | | Very positive | Slightly positive | No impact | Slightly negative | Very negative | Don't know or not applicable |
|------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------|
| UK visitors | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| European visitors | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Visitors from outside Europe | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q9 (IF IMPACT ON ANY VISITOR TYPE)

Is your business proactively doing anything to prepare for the impact (positive or negative)?

- Yes ☐
- No ☐

Q10 (IF YES TO ABOVE)

What are you doing to prepare? (*Unprompted*)

- Increasing promotion to the UK market ☐
- Targeting markets outside Europe ☐
- Reducing operating costs ☐
- Seeking new suppliers ☐
- Seeking advice from Welsh Government ☐
- Seeking advice from UK Government ☐
- Reviewing pricing to remain competitive ☐
- Other ☐
- Please specify other _____

Q11 *Interviewer: record all useful comments on the impact of Brexit on particular markets and what businesses are doing to prepare.*

Q12 Does your business employ anyone other than the proprietors?

- Yes ☐
- No ☐

Q13 (IF ANYONE EMPLOYED)

How many people does your business employ at this site, excluding the proprietors?

- Up to 5 ☐
- 6 to 10 ☐
- 11 to 50 ☐
- More than 50 ☐

Q14 (IF ANYONE EMPLOYED)

And how, if at all, has Brexit impacted on staffing at your business? (*Unprompted*)

- Positive impact ☐
- No impact ☐
- Negative impact - difficulties in recruiting new employees ☐
- Negative impact - difficulties in retaining existing employees ☐
- Negative impact - other reason ☐
- Don't know ☐

Q15 *Interviewer: record all useful comments on the impact on staffing*

Q16 Could I just confirm whether your business is graded or accredited by Visit Wales?

- Yes ☐
- No ☐