

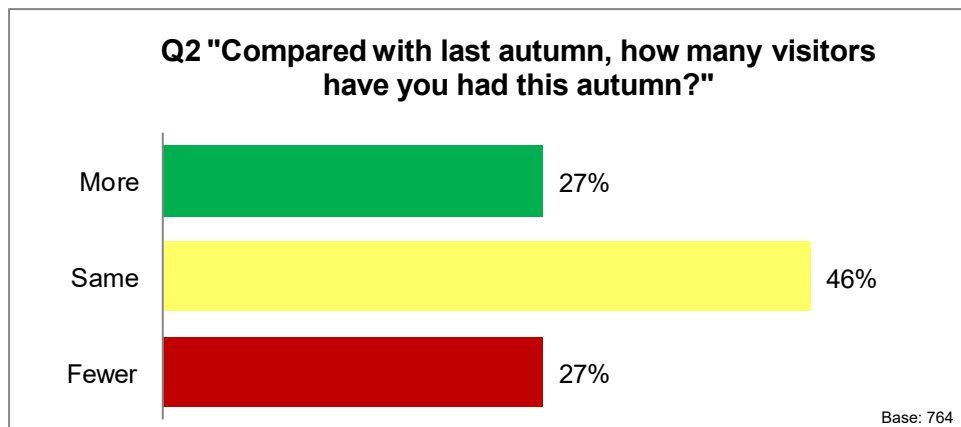


# Wales Tourism Business Barometer Wave 4, Autumn 2019 – Summary

## What is the Tourism Barometer?

The Wales Tourism Business Barometer gives quick feedback on how the tourism industry in Wales is performing at key times during the year. This research wave relates to autumn 2019.

Strategic Research and Insight, an independent research agency, has conducted 820 telephone interviews with tourism businesses in the following sectors: serviced accommodation, self catering, caravan & campsites, hostels, attractions, activity providers and restaurants, pubs and cafes.



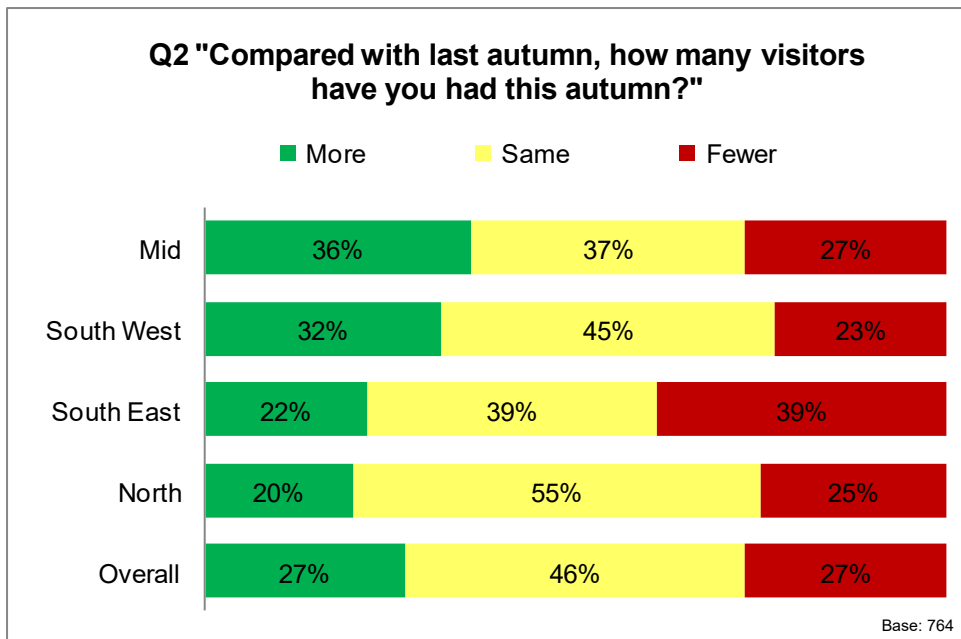
## Mixed season for the industry

Over a quarter (27%) of businesses have increased their visitor levels this autumn, but the same proportion has seen a decrease. Among those reporting an increase in visitors, about a quarter (23%) cite 'own marketing' as a reason, and one in five (20%) cite 'repeat business'.

Among those reporting a decrease, the top two reasons for being quieter are the weather (27%) and 'Brexit uncertainty' (22%). However, 'more British people staying in the UK' is cited by 14% of operators who have been busier, and some of them link this to Brexit uncertainty deterring holidaymakers from going abroad.

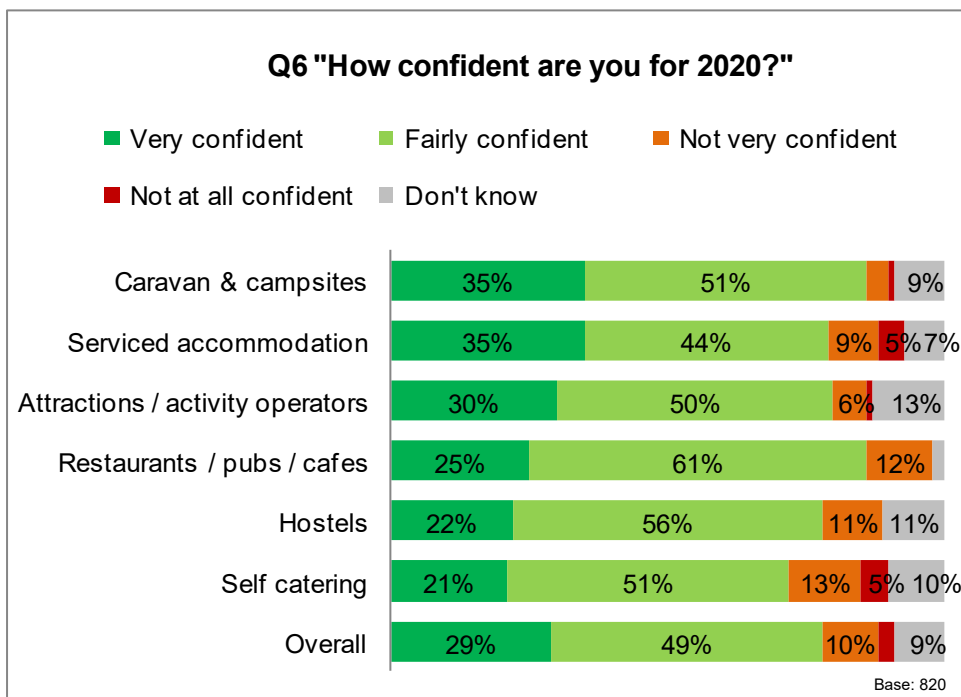
## Results are consistent by sector

The mixed period experienced by the industry as a whole is reflected across all sectors – the differences between them are not significant.



### Mid and South West Wales performing well, but a decline for South East Wales

Mid and South West Wales have both performed positively on balance. South East Wales on the other hand has seen about two in five (39%) businesses receiving fewer visitors – many (36%) of those do not know why they have been quieter.



### Confidence levels are typical for this time of year

In spite of a mixed autumn period and much uncertainty in the UK currently, confidence for 2020 is reasonable. About three in ten (29%) businesses are 'very confident' for 2020, and around half (49%) are 'fairly confident'. Confidence in the tourism industry is seasonal, and this result is typical for the time of year.

Full Research Report: Lydall, A. (2019). Wales Tourism Business Barometer – Wave 4, Autumn 2019.

Cardiff: Welsh Government, GSR report number 61/2019.

Available at: <https://gov.wales/tourism-barometer-wave-4-2019>

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

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Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

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