

# Wales Tourism Business Barometer 2022

## June Wave Report

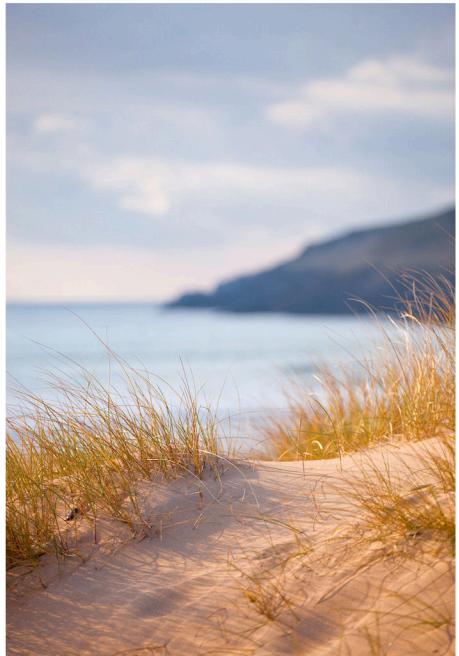


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## Wales Tourism Business Barometer 2022: June Wave Report

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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**

### **May half term on par with pre-Covid levels**

- 1.1 The May half term holiday, which included two bank holidays for the Queen's Jubilee, saw around a quarter (23%) of businesses receive more customers for the period than the pre-Covid norm. About half (52%) received the same level of customers and a quarter (25%) received fewer. Restaurants / pubs / cafes were the best performing sector, with 38% surpassing pre-Covid norms for the period.

### **Booking trends lean towards last minute, with some degree of cancellations**

- 1.2 36% of businesses say that bookings are more last minute this year, whereas 22% say they are made more in advance. The remaining 42% say there is no significant change in trend.
- 1.3 8% of businesses are experiencing a 'significant' level of cancellations, and 24% have 'some' level of cancellations. Some consumers deliberately 'overbook' their holidays with a view to cancelling unwanted options last minute. Weather and cost of living also play a part.

### **Holding back on significant price increases**

- 1.4 Although businesses are experiencing significant rises in operating costs, these increases are not yet being passed onto customers. Close to half (46%) of businesses are not changing their prices for this summer, and a similar proportion (45%) are only raising them 'slightly'. Many operators recognise that there is a limit to what consumers can afford and do not want to price themselves out of the market.

### **Summer visitors: much depends on cost of living and travel abroad**

- 1.5 Average booked occupancy among accommodation operators is approximately 71% for July and 70% for August. The above mentioned trends of last minute booking and cancellation behaviour make predicting performance based on advance bookings a little tricky.
- 1.6 Nevertheless, the outlook at this point in time is tinged with slight disappointment as domestic holiday demand was very high last summer, but it appears that businesses will have to strive harder to fill the bed spaces this year. The two key factors are thought to be the cost of living and the opportunity (if holidays are affordable) to start holidaying abroad again.

### **Local visitor levy**

- 1.7 Businesses have been asked how they would like to see the money raised through the proposed Visitor Levy spent – if it goes ahead in their area. A combined 45% want to see public infrastructure upgraded or added to. Marketing the area to tourists (21%) is also popular. 19% however declined to answer due to being too opposed to the idea of the levy.

## 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. This wave covers Easter, the May half term holiday, and advance bookings for the remainder of the year.

### How was the Survey conducted?

- 2.2 We have conducted 900 interviews by telephone. The results of questions asked to everyone are accurate to ±3.3%. The sample is broadly 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 accommodation	99	56	81	43	<b>279</b>
Self-catering	81	77	81	26	<b>265</b>
Caravan / campsites	52	24	34	12	<b>122</b>
Hostels	2	2	7	2	<b>13</b>
Attractions	21	27	15	23	<b>86</b>
Activity operators	11	6	12	5	<b>34</b>
Restaurants / pubs / cafes	25	25	21	30	<b>101</b>
<b>Total</b>	<b>291</b>	<b>217</b>	<b>251</b>	<b>141</b>	<b>900</b>

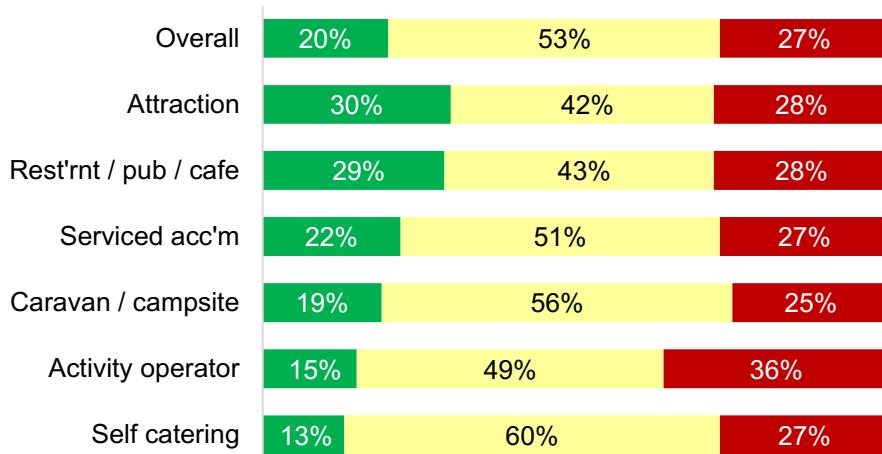
- 2.3 61% of businesses in the sample are graded by Visit Wales. The graded and non-graded samples are spread across the different regions and sectors except restaurants / pubs / cafes, where grading is not applicable.
- 2.4 All telephone interviews have been conducted with business owners or managers between 6<sup>th</sup> and 17<sup>th</sup> June.

### 3. Performance to Date

#### Easter performance

##### Q1a "How many customers did you have during Easter compared to a normal pre-Covid year?"

■ More than normal ■ Same as normal ■ Fewer than normal



*'Don't know' and 'not applicable' answers have been excluded*

Base: 820

#### Easter slightly down on balance

- 3.1 One in five (20%) operators managed to exceed normal pre-Covid customer levels at Easter, and around half (53%) achieved the normal level. But around a quarter (27%) had fewer customers than normal. Covid was still impacting on business around that time, as cases could cause some customers to cancel last minute.

*"Over Easter the Covid rates were still really high. We lost a lot of customers on a daily basis because of Covid ... the nature of Covid meant the cancellation would often be within 24 hours of the booking so we couldn't fill those spaces."*

Activity provider, South East

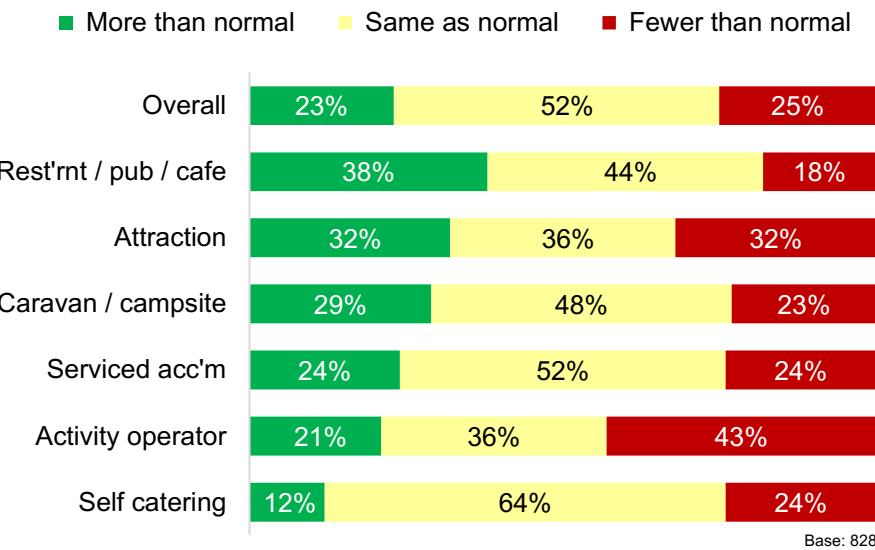
- 3.2 By region, South East Wales struggled to match normal pre-Covid customer levels the most, with 16% having more customers than normal, but 36% having fewer.

*"We're finding the trend for this year is fewer bookings and shorter stays if they did book"*

Serviced, South East

## May half term holiday performance

**Q1b "How many customers did you have during May half term compared to a normal pre-Covid year?"**



*'Don't know' and 'not applicable' answers have been excluded*

### On par with pre-Covid levels

- 3.3 This year featured a Platinum Jubilee bank holiday on Friday 3<sup>rd</sup> June following the altered late spring bank holiday on Thursday 2<sup>nd</sup> June to form a long weekend. In most cases this also overlapped with the school half term holiday.
- 3.4 Overall, the tourism industry performed at levels comparable to a normal pre-Covid year during this period. Restaurants, pubs and cafes performed particularly well during this time, whereas in other sectors, performance was mixed.

*"We're very weather-dependent. The Queen's Jubilee weekend caught us out. On Monday and Tuesday we were looking quiet but the bookings came flooding in on the Thursday for Friday and Saturday."*

Serviced, South West

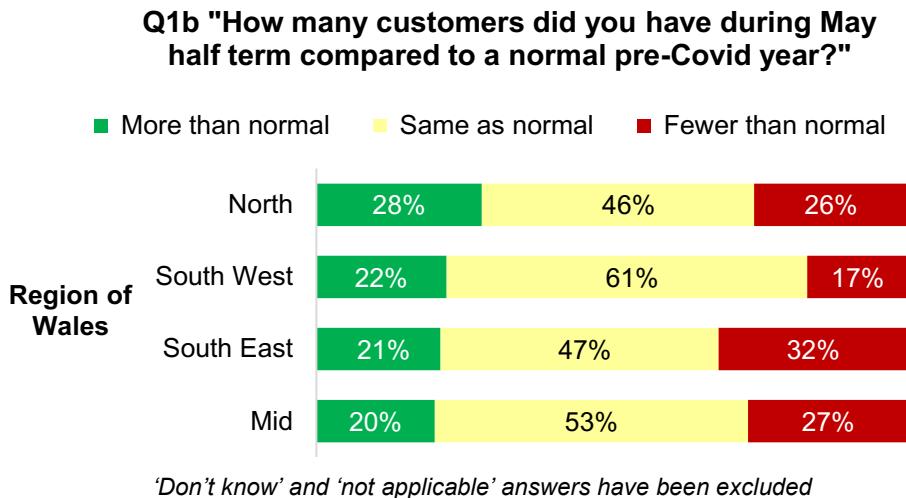
*"We were empty in May half term, which is absolutely unheard of. I am really worried about this year – people just aren't booking."*

Self catering, North

### Comparisons with 2021

- 3.5 The same question asked 12 months ago also showed May half term customer levels to be similar to a normal pre-Covid year. However, 12 months ago, many businesses were operating at significantly reduced capacity due to Covid guidelines and could not fulfil demand. It seems that whereas last year many UK consumers were keen to get away on domestic breaks, this year that demand has now softened.

## Differences by region



Base: 828

### Some variation by region

- 3.6 Performance in North and South West Wales was fairly comparable to pre-Covid (when comparing the proportion up on customers with the proportion down).
- 3.7 Mid and South East Wales on the other hand were down on balance compared to pre-Covid levels for the time of year, and some see this as a sign of what is to come.

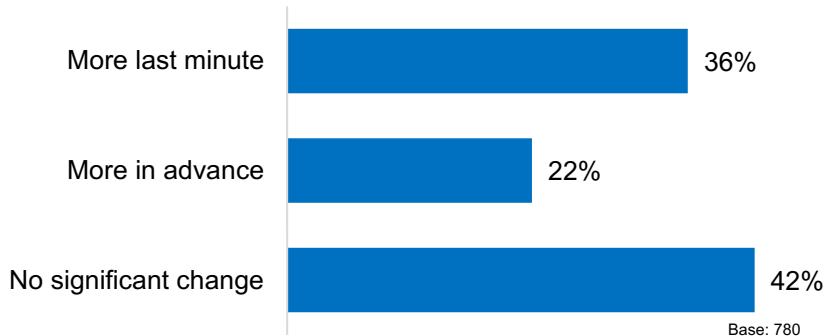
*"We are as busy as we were pre-Covid with all the customers"*  
Attraction, North

*"We think it will be a very quiet summer this year. We are still not getting our main customer base back, which is the older generation. We have had very few enquiries from overseas customers, whereas before Covid, we would have many."*  
Attraction, South East

## 4. Booking and Cancellation Trends

### Booking behaviour

**Q2 "How have you found the trends to book in advance or last minute so far this year?"**



*'Don't know' and 'not applicable' answers have been excluded*

### Mixed feedback on booking behaviour

- 4.1 More than half (58%) of operators are noticing a change in the timing of bookings this year. There is mixed feedback on whether this means customers are booking earlier or later than usual, but answers lean towards more last minute behaviour. There are several reasons for this – the main ones being waiting on the weather and seeing what can be afforded. The proportion seeing more last minute bookings is higher in North Wales (43%) than in the rest of Wales (33%).

*"People book on the weather. If it's going to be nice then we will have a lot of last minute bookings."*  
Serviced, North

### Differences by sector

- 4.2 Answers between accommodation sectors do not vary significantly. About two in five (39%) accommodation operators are seeing more last minute bookings, compared to 22% seeing more advance bookings.
- 4.3 In non-accommodation sectors, some businesses did not insist on or in some cases even facilitate pre-bookings before Covid. The change in timing of bookings is therefore influenced by the operator's approach to pre-booking now and previously. It also depends on their core market, e.g. schools for attractions & activity providers.

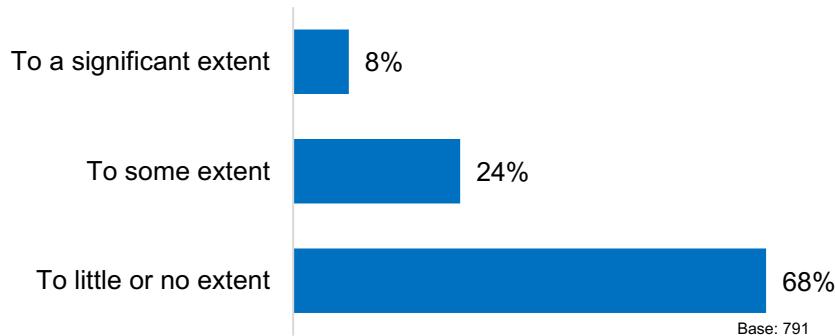
*"We mostly deal with school groups. They're booking further in advance than ever before."*  
Activity provider, North

*“Many were booking more in advance at the start of the year as that was the only way to enter the castle but now because restrictions have changed, more people are turning up on the day.”*  
Attraction, North

*“We get more advance bookings now as it is a new system we set up during lockdown”*  
Attraction, North

## Cancellation behaviour

**Q3 "To what extent, if any, are you finding this year that customers are cancelling bookings?"**



*‘Don’t know’ and ‘not applicable’ answers have been excluded*

### Some cancellation behaviour reported, but not by majority of operators

- 4.4 About two thirds (68%) of operators say that bookings are being cancelled 'to little or no extent'. Some say they were finding lots of cancellations last year, but that trend has calmed down this year.

*“Cancellations are down on last year because people were booking multiple places and that is not happening this year”*  
Serviced, North

- 4.5 Among operators experiencing cancellations, known or perceived reasons include:

- Customers booking multiple options (especially abroad + UK) with the intention of cancelling unwanted last minute options
- Financial reasons with the sudden increased cost of living
- Coach tour operators unable to fill the places
- Waiting on the weather

*“We are having lots of large coach operators booking in advance and then cancelling as they can’t get the numbers”*  
Attraction, South East

*“People are cancelling quite a lot. I think they’re booking various places to hedge their bets and picking last minute.”*  
Restaurant, South East

*“We are having a lot of customers double-booking with their holidays abroad and then cancelling last minute”*  
Self catering, Mid

*“Some customers are cancelling and citing financial reasons”*  
Self catering, North

### **Some customers don’t even cancel**

- 4.6 In the restaurant / pub / café sector, operators are fortunate if they even get notice of a cancellation. Some bookers just simply don’t turn up.

*“People aren’t even cancelling, they just aren’t turning up. This has been prevalent since the pandemic.”*  
Pub, Mid

*“It’s not so much that we’ve been having cancellations; rather people are booking tables last minute and not turning up”*  
Restaurant, South West

### **Differences by region and sector**

- 4.7 Differences by region and sector are mostly not significant, except that cancellations seem to be more common in caravan & camping (14% are having cancellations to a significant extent). The sector is particularly weather-dependent, as shown in many previous barometer surveys by significant changes in visitor levels in close correlation with good or bad weather.
- 4.8 But the sector is also very sensitive to fuel prices if customers are bringing their own motorhome or caravan, and this is also thought to be a key reason for cancellations.

*“We had a lot of advance bookings in January and February but now we are getting a lot of cancellations – we think because of fuel.”*  
Caravan park, North

*“We have noticed a lot more last minute bookings and more cancellations since the fuel prices started going up”*  
Caravan park, North

### **Actions to tackle cancellation behaviour**

- 4.9 Some operators are taking action to minimise the effects of cancellation on their business. These include taking larger deposits or changing the cancellation policy.

*"Most bookings are now online, with a clear cancellation policy explained due to too many people cancelling last minute"*  
Attraction, Mid

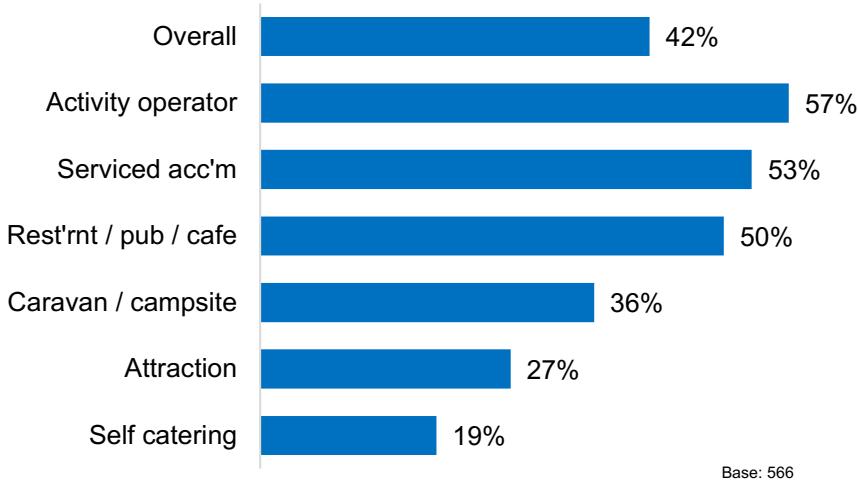
*"We've changed our cancellation policy since restrictions were lifted. If someone has Covid now, we ask to see proof in the Track and Trace app and will give a refund or postpone their stay."*  
Serviced, South West

*"We have a rigid cancellation policy so people are handing their bookings over to friends or family if they can't come. We encourage that."*  
Serviced, South West

## 5. Staff Shortages

### Extent of staff shortages

**Q5 "Are staff shortages currently affecting your business?"**



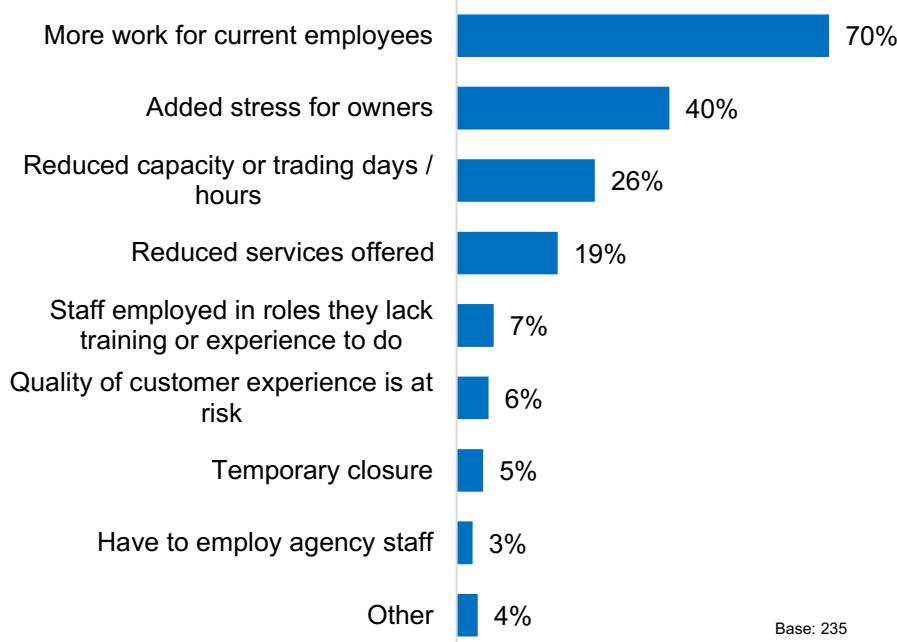
*Q5 has been asked to businesses which employ staff other than the proprietors*

### Staff shortages still causing problems in some sectors

- 5.1 About two in five (42%) businesses which employ staff other than the proprietors are currently affected by staff shortages. This equates to about a quarter (26%) of all respondents (if businesses not employing staff are included). This is very similar to the situation last reported in the spring barometer (in March).
- 5.2 Shortages are most apparent among activity providers, restaurants / pubs / cafes and serviced accommodation. Some employers are just not receiving applications or finding applicants turning up to interviews.
- "We have advertised for two positions but had only two applicants, whereas a few years ago we would have had 30."*  
Attraction, North
- "Chefs and door staff are really difficult to find. I had twenty-five interviews lined up and only six turned up."*  
Pub, South West
- 5.3 Some businesses are in fortunate locations where they can draw upon a large pool of willing workers, e.g. students.
- "Because of the students, we have no problem finding staff"*  
Restaurant, Mid
- 5.4 The effects of staff shortages are discussed below.

## Effects of staff shortages

**Q6 (IF SHORTAGES) "What are the effects of staff shortages on your business?" (Unprompted)**



*Q6 has been asked to businesses affected by staff shortages*

### A lot of work and/or stress

- 5.5 Not being able to recruit staff is having significant negative effects on some businesses. Owners and/or existing employees are often having to work harder to keep the business operating, and this is not sustainable in the long term.

*"It's very difficult to recruit experienced staff. I'm expecting a baby soon and I've had to continue front of house and managing the restaurant when ideally I wouldn't be."*  
Restaurant, South East

*"Getting staff is a nightmare ... we have been working 80 hours a week. By September we are on our knees."*  
Pub, Mid

*"Staffing is a real issue. People don't bother to turn up for interview after applying. It is very stressful for current employees who want to quit because of it."*  
Restaurant, South East

### Tourism offering in Wales is losing out from reduced trading and/or services

- 5.6 Some businesses have had to resort to reducing services, trading hours/days or even closing the business temporarily because of not being able to find the staff. Some say that demand is there – they just can't fulfil it.

*“Bookings are good. What's holding us back is staff.”*  
Hostel, South West

*“The restaurant isn't even open at the moment as we can't get a cook”*  
Restaurant, North

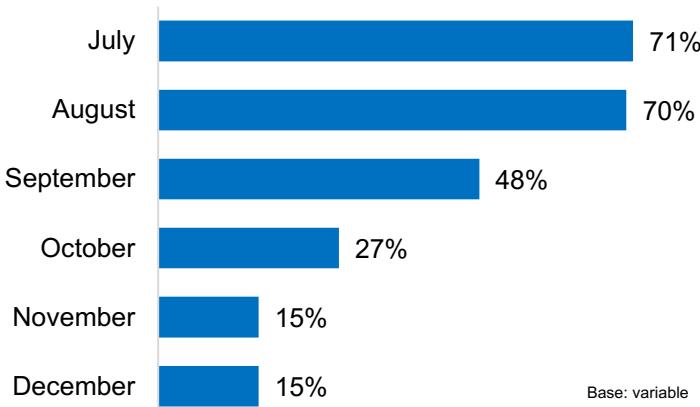
*“We have had to close the restaurant on Mondays and Tuesdays until we get another chef”*  
Serviced, North

*“We are only opening if a month has a lot of bookings as we just can't get the staff to stay open.”*  
Caravan park, Mid

## 6. Advance Bookings and Confidence

### Advance bookings by month

**Q7 "Looking ahead, about how much of your available capacity is booked for ... ?" (av. occupancy shown)**



*Q7 has been asked to accommodation operators. 'Don't know' and 'not applicable' answers have been excluded.*

### Reasonable booking levels, but actual numbers hard to predict

- 6.1 Currently, the peak season of July and August is around 70% booked. What this actually means in terms of how many tourists will come though is quite hard to predict. The trend towards booking more last minute discussed earlier means that many currently empty beds could still get taken. Contrary to that though, cancellation trends being experienced by some operators mean that some current customers might not follow through with their bookings.
- 6.2 The months after September often do not get booked until later in the year.

*"Bookings for autumn and winter months usually pick up in September"*  
Caravan park, Mid

### Sentiment among operators is somewhat muted

- 6.3 There is a general feeling that summer bookings this year are a bit disappointing after some operators were so busy last summer. 70% booked at this stage is felt to be not great – operators were hoping for more.

*"We are at about 75% capacity for July and August. We are expecting a very quiet summer as people will start going abroad again this year."*  
Serviced, Mid

*"It is not as buoyant as last year – we are hoping for a lot of last minute bookings"*  
Serviced, North

- 6.4 The rising cost of living and possibilities to start going abroad again are the two most common factors thought to be behind disappointing booking levels.

*"There is a different demographic now. We are experiencing a lot of older guests. The younger ones 30-45 who had expendable income stayed here during Covid but have now gone back to places like Tenerife."*

Serviced, North

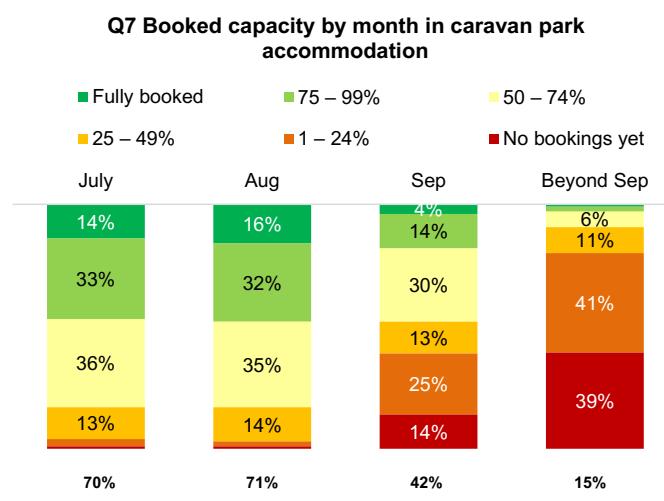
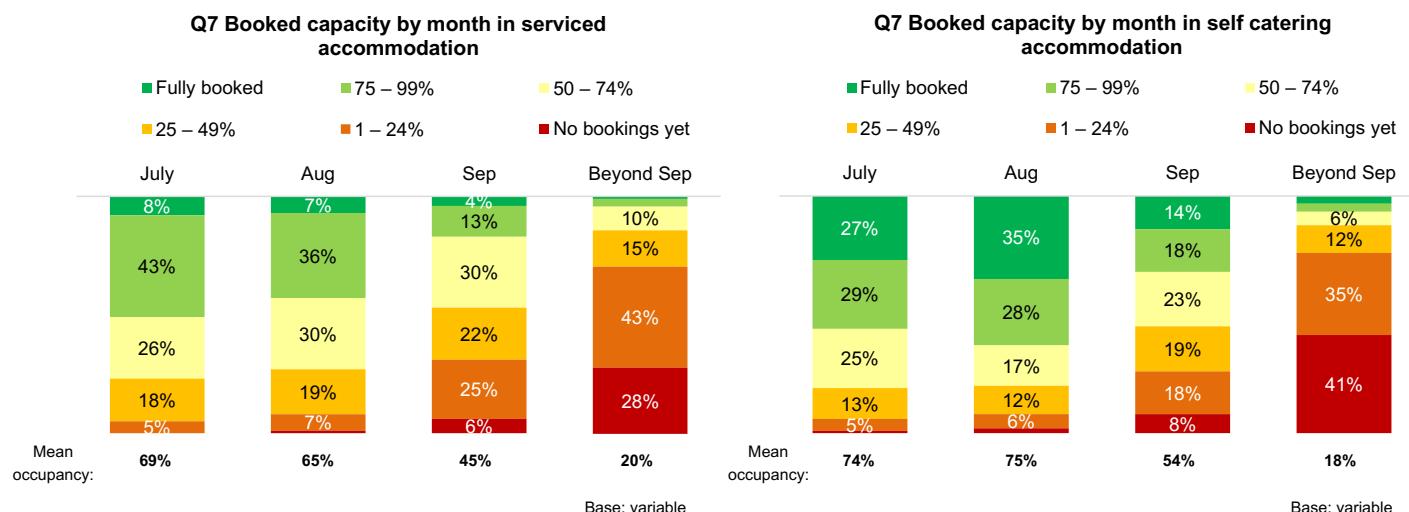
*"A lot of people are worrying that they won't be able to afford a holiday this year alongside all the other increases in costs"*

Caravan park, South East

## Differences by region and sector

- 6.5 South East Wales is lagging behind the rest of Wales – 60% average booked occupancy for July (compared to 73% for the rest of Wales) and 58% average booked occupancy for August (72% for the rest of Wales).
- 6.6 Detailed results by sector and month are shown below.

## Advance bookings by sector



## **Self catering**

- 6.7 For self catering, the capacity not yet booked and still available is higher in July than August. In July, just under half of operators have a quarter or more of their capacity still available, whilst in August, 37% have a quarter or more of their capacity still available.

## **Serviced accommodation**

- 6.8 For serviced accommodation, the capacity not yet booked and available is higher in August than July, possibly reflecting shorter booking lead times. In July, around half of serviced operators have more than a quarter or more of their capacity still available. The spare capacity is higher in August, with 57% of serviced operators having more than a quarter or more of their capacity still available.

## **Caravan parks**

- 6.9 These have a higher amount of capacity available than self catering during July and August. Just over a half have a quarter or more of their capacity still available in each month.

## **Differences by sector do not reflect the current sentiment among operators**

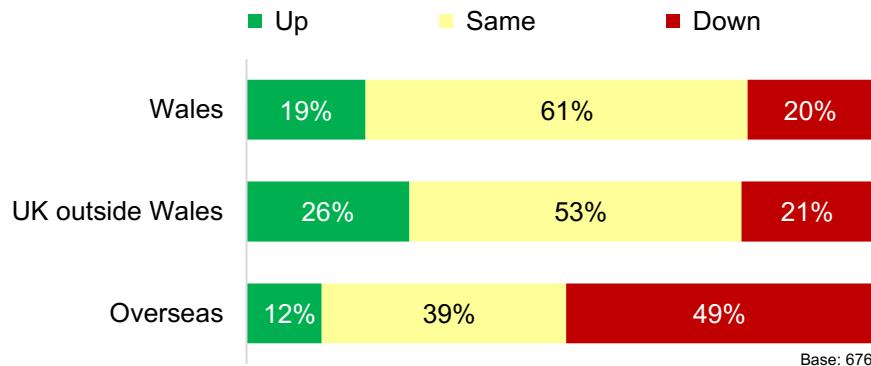
- 6.10 Self catering accommodation in Wales is currently more booked up this summer than caravan and serviced accommodation. However, self catering operators' expectations for advanced summer bookings are greater and as such, their mood is not more positive than the other sectors, rather less so. We discuss this further under Q9 (confidence).

*“Last year was really busy – this year is looking dire”*  
Self catering, North

*“We are filling up nicely and are even getting bookings for next year already”*  
Serviced, North

## Expectations by market

**Q8 "How do you expect your level of customers from ... to be this summer compared to a normal pre-Covid year?"**



*'Don't know' and 'not applicable' answers have been excluded*

### Domestic visitors being relied upon again

- 6.11 For the previous two summers during the pandemic, operators had to rely heavily on domestic tourism as international leisure travel at various times and from various places was either awkward or not allowed at all.
- 6.12 This summer, it seems that the Welsh tourism industry will be depending on domestic visitors once more as overseas visitors are not yet expected back at pre-pandemic levels. This is consistent across all regions and sectors.

*"We are expecting a normal summer for Welsh tourists. We have seen an increase in Irish, English and Scottish tourists. We are not seeing overseas tourists like Americans or Australians come back through yet."*

Serviced, North

- 6.13 Operators are waiting with some degree of unease to see whether domestic tourists will (a) find the money for holidays and (b) choose to spend it in Wales instead of abroad. Recent flight delay and cancellation chaos at airports may push some holidaymakers in Wales' direction.

*"We are expecting this summer to be pretty busy because of holiday cancellations abroad and problems with flights"*

Attraction, South East

*"We think this summer will be very quiet as people don't have the money to spend on luxuries and hobbies due to the rising fuel prices and bills."*

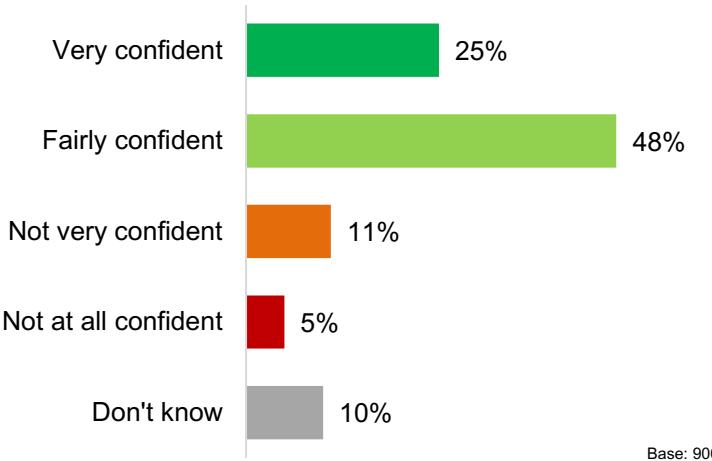
Attraction, Mid

*"We are going to be very busy this year as we have a backlog from last year but I think next year will be very quiet with more people going abroad"*

Serviced, North

## Confidence for the summer

**Q10 "How confident do you feel about running the business profitably this summer?"**



## Reasonable levels of confidence about profitability

- 6.14 In spite of rising operating costs and some uncertainty over how visitor levels this summer will turn out, the majority (73%) of operators are confident about running their business profitably. This is very similar to confidence levels this time last year.

*"We are expecting a busy summer"*  
Attraction, South East

*"We are as fully booked as we want to be for the summer months"*  
Serviced, Mid

- 6.15 Among accommodation operators, self catering operators have the highest advance bookings levels (discussed earlier under Q7) but lower confidence. Around a quarter (26%) of self catering operators are not confident about running the business profitably this summer.
- 6.16 The current mood in the self catering sector is being affected by the new '182 days' rule which means that from April next year, holiday homes will have to be let for more than 182 days a year in order to qualify for non-domestic rates and therefore avoid paying council tax on the second home, which some local authorities charge at a premium rate. Currently the threshold is 70 days. Many self catering operators feel that they are a 'genuine business' but cannot realistically meet the 182 day threshold, especially if they are not near a coastline, as they don't have enough year-round demand.

*"Increasing bookings from 70 to 180 a year is a massive increase. For businesses not in coastal areas, it's going to be a killer."*  
Self catering, Mid

*"Although we get past this threshold, many smaller businesses will be very adversely affected. It's going to destroy small businesses in Wales."*  
Self catering, Mid

## 7. Response to Inflation

### Changing prices

**Q11 "In response to rising operating costs but also the rising cost of living for consumers, have you or do you intend to change your prices for this summer compared to what you would normally charge?"**



*'Don't know' and 'not applicable' answers have been excluded*

### Some price rises, but mostly not to a significant degree

- 7.1 Around half (51%) of operators are raising their prices, but in most cases only slightly. Many (46%) are not changing their prices at all. They recognise that consumers now have less disposable income and do want to raise prices to the degree that customers just won't book. This means that businesses are taking some of the hit from inflation as they are not passing on increases in operating costs in full to their customers.

*"We put our prices up over Covid and don't feel it's fair in the current climate to increase them again"*

Activity provider, South West

### Price increases may well come in the near future though

- 7.2 Some operators say that they already raised their prices in time for this year but did not know what was coming and will therefore raise prices at the next opportunity. Others will also look to review their prices if costs keep going up.

*"We are not doing anything at the moment in response to rising operating costs but we will be doing more in the future towards the autumn time when food and operating costs go up again"*

Caravan park, Mid

*"We have to stick with the prices we set at the beginning of the year"*

Serviced, South West

*"I put the prices up at Christmas. If I had known what was around the corner, I'd have put them up by a lot more as menus cost a lot of money. Any profits we're making are gone due to the increased price of food."*

Café, South West

### **Staff also have rising living costs, not just customers**

- 7.3 A further consideration pointed out by some operators is that it is not just customers who are experiencing the rising cost of living, but their own staff too. This has influenced some price rises – so that the business can pay its staff more.

*"We had already increased our prices as we hadn't done for some time. We wanted to be able to pay our instructors more."*

Activity provider, North

### **Differences by sector**

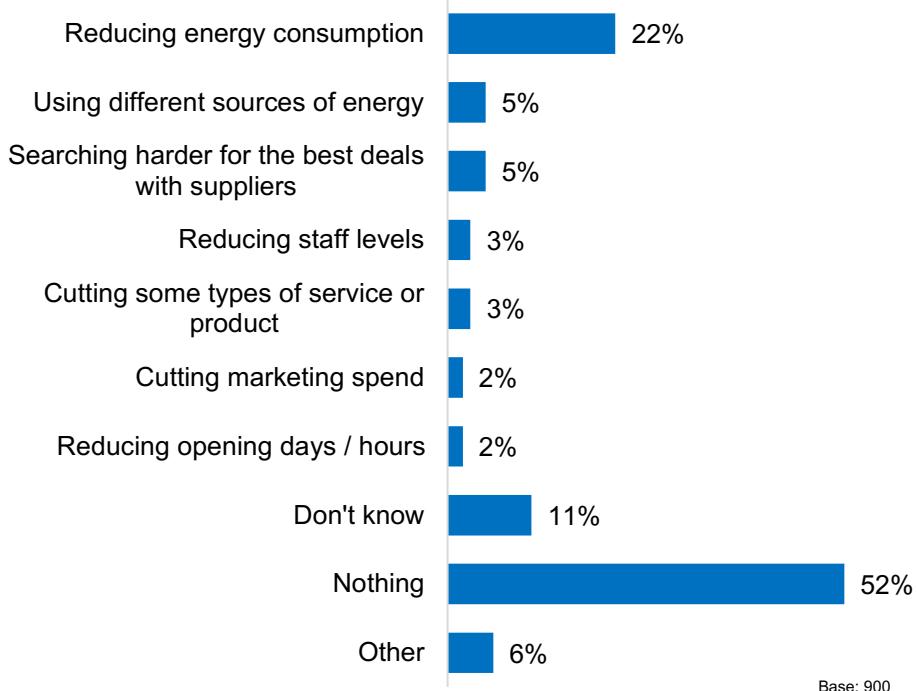
- 7.4 The sectors with the highest proportions of business putting up prices ‘significantly’ are activity providers (13%) and restaurants / pubs / cafes (11%), who are struggling to cover the cost of food. Differences by region are not significant.

*"We have significantly raised our prices as we use expensive produce and that has gone up significantly, as well as other operating costs"*

Restaurant, South East

## Other responses to rising operating costs

Q12 "Are you doing anything else in response to rising operating costs?" (prompt if necessary)



### Saving energy

- 7.5 Operators are taking a range of measures besides price increases to try and tackle rising operating costs. The most common measure in every sector and region is reducing energy consumption. Some are frustrated to see their customers not having the same frugal attitude.

*"We notice a lot of our customers are putting the heating on full but then leaving the windows wide open and it's very hard to tell them to watch how much they're using"*  
Self catering, North

*"A lot of people whack the heating on when they're not in and leave all the lights on. It's a bit frustrating when I go past and I can see that people have left the bathroom light on."*  
Self catering, North

### Using different sources of energy

- 7.6 Some businesses are seeking new sources of energy such as solar to combat rising bills.

*"We are looking to install solar panels to reduce energy consumption"*  
Self catering, Mid

## **Reduced staff and/or opening days/hours**

- 7.7 Some businesses are cutting costs by reducing their opening hours, and linked to this is the saving made on employing staff.

*"We have reduced our operating hours to 5 days a week as Sunday and Monday are our quietest days and we cannot afford the staff to run on both these days. This also reduces our energy consumption if we are not running on those days."*

Serviced, Mid

*"We are keeping our staff numbers low ... we have a team of six but are having to close the kitchen on some days to keep costs low as our bills have gone up £1,000 a month."*

Serviced, Mid

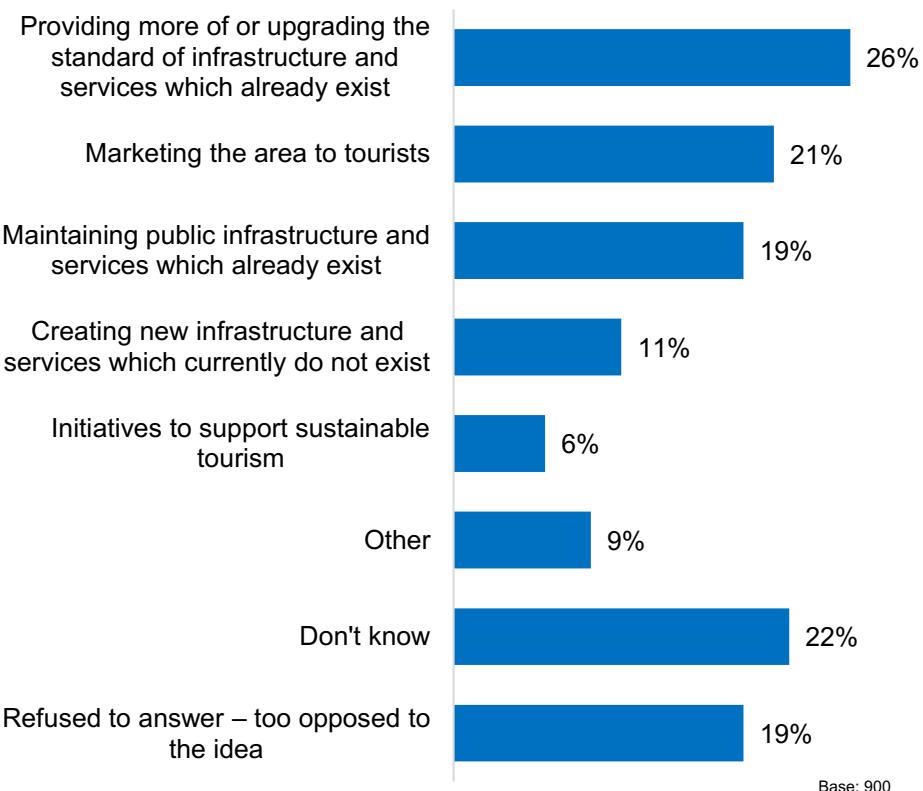
## 8. Local Visitor Levy

### Views on how to spend the money if implemented

8.1 Prior to asking Q13, respondents have been read the following statement:

*"Welsh Government will be consulting in the autumn on proposals for a local visitor levy. Where introduced, each local authority will have the power to decide whether to apply a levy to visitors staying overnight in their area. We're not asking whether you think a levy should be introduced or not, as you will have the opportunity to respond directly to Welsh Government in the consultation if you wish."*

**Q13 "If the levy were to go ahead in your area, what do you think your local authority should spend the money on?" (prompt if necessary)**



Base: 900

### Improving the basics that are already there

8.2 Operators have come up with a variety of suggestions as to how local levy money should be spent. Answers lean more towards improving and maintaining infrastructure and services which already exist rather than creating brand new ones.

*"We think improving the existing infrastructure should be a top priority for the levy money"*  
Attraction, North

*“The Aberystwyth promenade needs cleaning up, so that would be the best place to spend the money”*  
Restaurant, Mid

*“The money from the levy needs to go into perfecting the attractions that already exist. The people of Aberystwyth don’t like change, so enhancing already existing attractions would be better.”*  
Café, Mid

*“The town [Haverfordwest] is dead. There are weeds and rubbish everywhere. The shops are closed down. It looks like a nuclear bomb has been dropped on the town and we’ve just come out of a nuclear war. I’m embarrassed. It’s disgusting. Tourists leave reviews about it.”*  
Serviced, South West

#### 8.3 Services and infrastructure highlighted as particular areas to focus on are:

- Toilets
- Roads
- Car parks
- Public transport

#### 8.4 Three of the above are about access. Much of Wales’ tourism offering is remote and rural – key reasons why visitors come. But many places can be hard to get to or around.

*“Improvements to transport rurally across Wales would help a lot with tourism”*  
Serviced, South West

*“There is a parking shortage in Llandudno which the levy could pay for”*  
Serviced, North

*“Resurfacing the road particularly down to the lake would be helpful”*  
Caravan park, Mid

*“New parking zones in areas like Ogwen and Pen-y-Pass are needed”*  
Attraction, North

*“Public transport in particular in our area could be improved by the levy”*  
Caravan park, Mid

#### 8.5 Public toilets are essential in all tourist areas but they are not always open or well maintained.

*“The village has closed its public toilets so we have many visitors coming to the caravan site asking to use our staff toilets”*  
Caravan park, Mid

*“Porthcawl needs better facilities, like more parking and more public toilets”*  
Attraction, South East

## **Marketing the area to tourists**

- 8.6 Some areas know that large volumes of tourists come to Wales, but they don't necessarily come to their area. Using local levy money for marketing would be one way to spread visitors to Wales more evenly across different areas.

*"We think money towards marketing the area would work wonders for us. I never thought about that sort of funding before."*  
Self catering, South West

*"The levy money should be spent on making more tourist offices in Wales – to help direct tourists to the best local places. If these places had very good modern websites, it would also help."*  
Caravan park, Mid

## **New attractions**

- 8.7 If levy money is to be spent on creating something new, some areas need new attractions, especially indoor ones for the winter and/or bad weather.

*"The winters are dead here as all the attractions are closed so there is nothing for visitors to do"*  
Serviced, North

*"Need more indoor facilities in Llandudno like ten pin bowling or something similar that all the family can enjoy when it's raining"*  
Serviced, North

## **Sustainable tourism**

- 8.8 Some would like to see local levy money spent on encouraging or enabling sustainable tourism.

*"We are thinking about putting in electric charging points as a few of our guests have electric cars so it would be helpful if the local area has some."*  
Caravan park, North

## **Trust issues**

- 8.9 Some operators are bit sceptical that levy money will get spent on local tourism. There is a fear that it will disappear into some sort of general pot or displace other budgets and that tourists won't actually benefit from it. If the levy goes ahead, the trade will need reassuring that the money will be spent on what it is intended for.

*"I don't trust the local authority to pay back into the local tourism economy"*  
Pub, Mid

*"I don't think the levy will work as it will make the local authorities stop using their money to spend on tourism and use the levy instead, which will equate to less money overall"*

Self catering, South East

### **Other suggestions**

- 8.10 'Other' suggestions not falling into the main categories above include staff training, along with some non-tourism related ideas such as supporting local communities (rather than tourists), small local businesses and the NHS. Investing in local staff training might help to tackle the staff shortages.

*"If there was any money from a levy, it should go on staff training for people in the hospitality sector. Before Covid we were employing 28 part time staff in our kitchen and now we have closed the kitchen and are struggling to find five staff for our takeaway."*

Caravan park, North