

Dadansoddi ar gyfer Polisi



Analysis for Policy

Ymchwil gymdeithasol
Social research

Number: 59/2013



Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

Wales Tourism Business Survey Wave 3, 2013



Wales Tourism Business Survey – Wave 3, 2013
Research on behalf of Visit Wales

Sarah McDonough, Beaufort Research Ltd.

The logo for Beaufort Research, featuring the text "beaufortresearch" in a white, lowercase, sans-serif font, centered within a solid purple rectangular background.

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

For further information please contact:

Krishan Kawol

Tourism Research

Knowledge and Analytical Services

Welsh Government

QED Centre, Treforest Industrial Estate

Pontypridd, Rhondda Cynon Taf, CF37 5YR

Tel: 01443 845750

Email: krishan.kawol@wales.gsi.gov.uk

ISBN: 978-1-4734-0249-2

Welsh Government Social Research, 2013

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KEY FINDINGS

Business Confidence

- Over half (57%) of all businesses established for longer than 12 months had received more guests/visitors this August compared to last August, with less than one fifth (17%) reporting they had received fewer. Guest/visitor numbers showed the greatest increase for attractions (73%) and the smallest increase for self-catering accommodation (30%).
- For businesses receiving more guests/visitors this year, better weather (62%), marketing efforts (7%) and improved rooms/facilities (7%) were felt to have contributed to the increase in numbers. On the other hand, for those businesses that had received fewer guests/visitors, the weather (33%) and economic climate (27%) were felt to be the main causes of this.
- Closely linked to guest/visitor numbers, over half (55%) of the businesses reported a higher turnover this August compared to last August, and just 16% reported a lower turnover. Self-catering accommodation providers were most likely to have experienced lower turnover (22%), whereas attractions were most likely to have had greater turnover (69%).
- Most businesses were confident about the upcoming Autumn season (79%), with 20% very confident and 59% fairly confident.

Welsh Market

- On average, businesses estimate that 24% of their guests/visitors live in Wales and contribute 24% of their annual turnover. Overall, just 8% of the businesses indicated that none of the guests/customers were Welsh residents; most (69%) said that Welsh guests account for up to half of their customers, while only 12% said more than half of their customers are Welsh residents.
- When considering the purpose of their visit, businesses on average estimated that 68% of their Welsh customers visit for a leisure trip or holiday. This compared to average estimates of 12% visiting for special events and 5% for business trips.
- Over half (54%) of the businesses felt that the number of visitors from within Wales had remained the same over the last three years. However, a quarter felt that the number of Welsh customers had increased (27%), with only 7% saying Welsh guests had decreased.
- Over three quarters (76%) of businesses considered customers/guests who live in Wales as being important to them over the next three years, with 50% classifying them as very important and 26% as fairly important.

- Currently, just less than a third (32%) of businesses specifically target customers/guests who live in Wales through targeted advertising, promotional or marketing techniques. The most popular methods of doing so are through their own business website (35%) and the Visit Wales website (32%).
- Over half of tourism businesses (55%) provide Welsh language services for their guests/visitors, although 45% do not. Around two in five (41%) businesses have Welsh speaking staff, and a further quarter (24%) have leaflets/printed or signage in Welsh.

Discounts and Special Offers

- Nearly half (47%) of the accommodation providers interviewed felt there had been no change in the number of guests looking for special offers or discounts. However, 23% thought there had been a slight increase and 22% a significant increase.
- Overall, one in ten (10%) businesses indicated that they are using discounts and special offers extensively this year. A further 39% claimed to be using them to some extent, but half (50%) are not using them at all. Businesses in Mid Wales are the least likely to be using discount and special offers, with 56% claiming not to be using them.
- When specifically asked whether they are advertising on discount websites such as Lastminute.com, Trivago and Groupon, less than one in five (17%) indicated they are doing so. Use of these types of discount site is greater amongst serviced accommodation providers (32%) and those located in South East Wales (22%).

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 May bank holiday period. The research data is supplied by the end of the week of fieldwork, with a full report completed by early the following week.

The subject areas covered in Wave 3 of the Business Tourism 2013 survey are:



Business confidence

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



Welsh Market

The penetration and importance of the Welsh market to businesses, efforts to attract Welsh customers and the provision of Welsh language services



Discounts

Requests for discounts from customers, discounts offered by businesses and presence on discount websites

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 – 6 minutes to complete and all respondents were offered the choice of conducting the interview in the language of their choice, English or Welsh. A total of 8% of the sample undertook the interview in Welsh; take-up of this option was highest in North Wales (13%) and Mid Wales (12%), and lowest in South East Wales (1%).

A total of **404 interviews** were conducted, and fieldwork took place on 2nd and 3rd September 2013. This report was produced on Monday 9th 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 all known tourist attractions in Wales (held by Beaufort Research). Businesses fell into one of four distinct business groups:

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

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

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 Taf
			Torfaen
			Vale of Glamorgan

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

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

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

Table 1 – interviews achieved by business type and region

Business Type	Region				
	North	Mid	South West	South East	TOTAL
Attractions	19	28	20	22	89
Accommodation – serviced	48	31	30	32	141
Accommodation – self-catering	43	36	36	22	127
Accommodation - caravans	12	13	17	5	47
TOTAL	122	98	103	81	404

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

3. MAIN FINDINGS

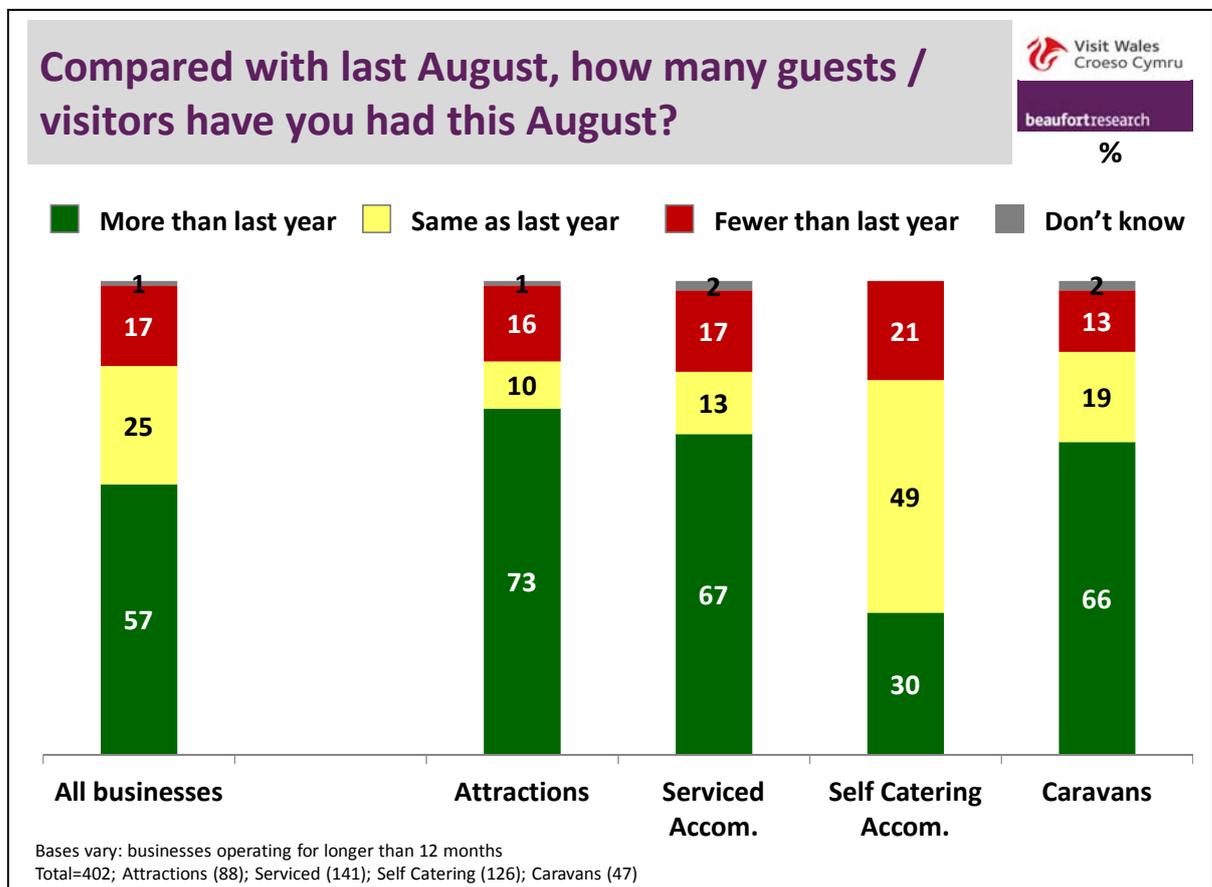
3.1 Business Confidence

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

Over half (57%) of the businesses said they had received more guests this August compared to last August; 34% said this in May and only 14% at Easter. Less than one in five (17%) said they had received fewer guests/visitors compared to last year (35% said this in May, 49% at Easter).

Looking at this by business type, attractions showed the highest proportion of businesses receiving more guests/visitors (73%). Around two thirds of businesses in the serviced accommodation and caravan sectors also claimed they had more guests/visitors this August compared to last (67% and 66% respectively). Meanwhile, almost half (49%) of the self-catering accommodation businesses felt their guest/visitor numbers had been the same, while just over one fifth (21%) felt they had fewer visitors this August – see Figure 1 below.

Figure 1



Examining guest/visitor numbers by region, it was noted that the highest proportion of business reporting more guests/visitors were situated in North Wales (61%), while the highest proportion reporting fewer (22%) were situated in South East Wales.

Amongst those businesses that had received more guests/visitors, the majority claimed that this was because of better weather (62%). Other factors were mentioned by significantly smaller proportions of business. Just 7% felt their own marketing efforts had resulted in the increased numbers, and similarly 7% thought room or facility improvements had been determining factors. Similar proportions said that their upturn in guest/visitor figures was due to repeat business or recommendations (6% for each) – see Table 2 below for more details.

Table 2

Why would you say you have had more guests / visitors (unprompted)?	% respondents
Better weather	62
Own marketing	7
Improved rooms / facilities	7
Repeat business	6
Recommendations	6
Upturn in tourism	5
More British people staying in the UK	5
Increased capacity	4
Events in the area	3
More overseas visitors	3
Other	24
Don't know	2

Base = businesses trading 12+ months with more visitors this August compared to last year (228)

Several businesses also mentioned that their trade had increased due to an upturn in tourism and more British people staying in the UK (5% for each), while others felt that the Olympics had a positive impact. Some also mentioned how increasing their online presence through sites such as Laterooms.com, TripAdvisor and booking.com had resulted in an increase in business.

For some the boost in business was connected to their personal feeling that the economic situation has improved.

“I just think there’s a better economic climate – there seems to be more money about”
(Serviced Accommodation, North Wales)

Amongst those businesses that said they had received fewer guests/visitors this August, one third (33%) felt that this was a direct result of the weather not being as good this year. Almost one in three also noted that they felt their lower numbers had been a result of the economic climate (27%) – these were by far the most frequently mentioned reasons for the drop in trade – see Table 3 below for more details.

Table 3

Why would you say you have had fewer guests / visitors (unprompted)?	% respondents
Weather not as good	33
Economic climate	27
Unforeseen problems	10
Downturn in tourism in the area	10
Didn't promote the business	6
Strong competition	4
Business winding down	1
Fewer overseas visitors	1
Other	34
Don't know	10

Base = businesses trading 12+ months with fewer visitors this Easter compared to last year (70)

There were a number of these businesses who noted that the good weather may actually have been detrimental due to the nature of their attraction or location.

“Sunny weather keeps people out of city centre locations”

(Serviced Accommodation, South East)

“Summer workshops operate more if it's wet, so we were slightly busier last year”

(Attraction, South East)

“Lovely weather deters visitors”

(Attraction, South West)

One business also mentioned the strength of the Scottish and Irish tourism boards compared to the Welsh.

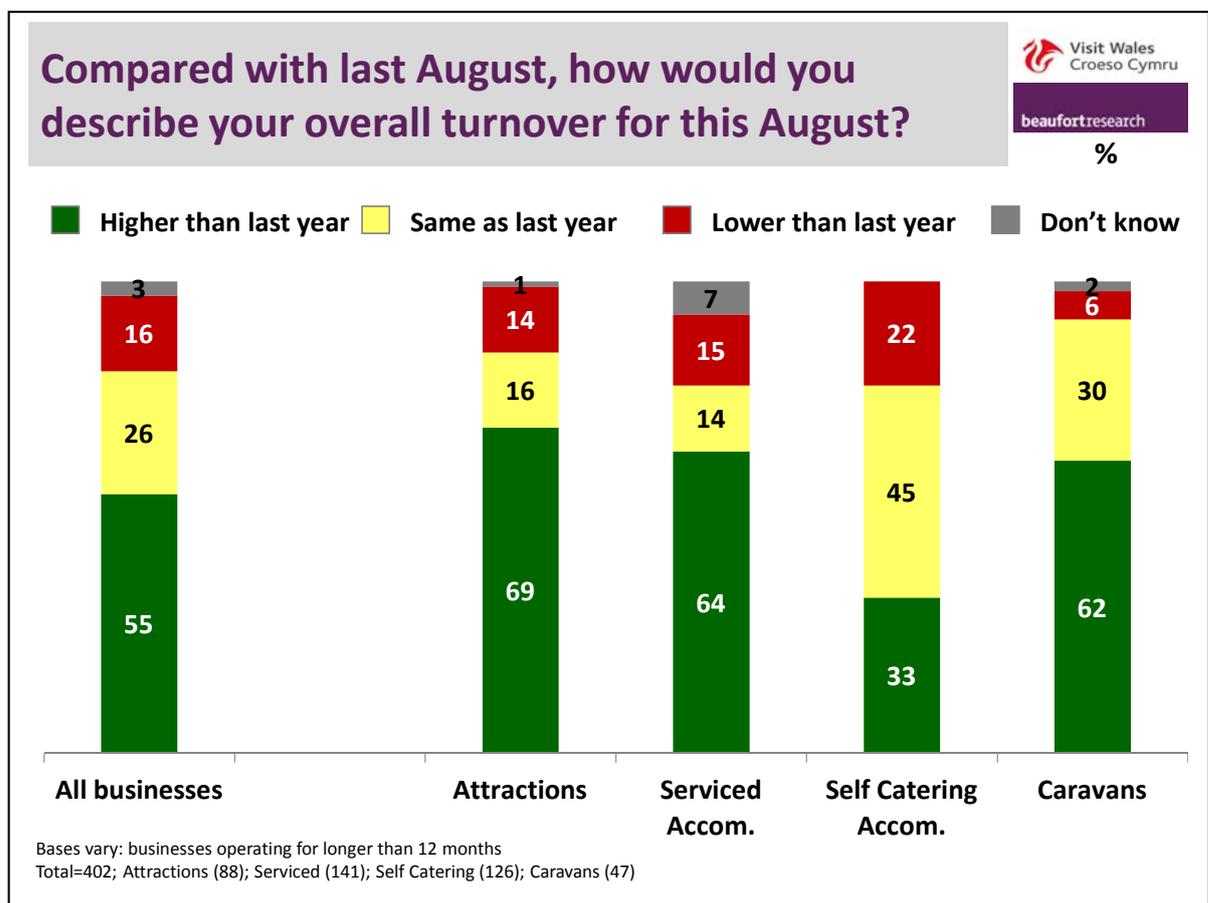
“Irish and Scottish tourism boards far better than the Welsh “

(Self-Catering Accommodation, South East)

Not surprisingly, when asked to compare their business' overall turnover for this August compared to last, the findings reflected those seen for number of guests/visitors. Over half (55%) said their turnover had been higher this year and less than one fifth (16%) stated it had been lower. The remaining 26% said that turnover this August was around the same as the level seen last year. These findings are again more positive than those seen at Easter and in May.

Attractions were most likely to report that they had higher turnover this August (69%), while self-catering accommodation providers were most likely to report a reduction in turnover (22%). Saying that, around double the proportion (45%) of self-catering accommodation businesses reported turnover this August as being equal to last year– see Figure 2 below.

Figure 2



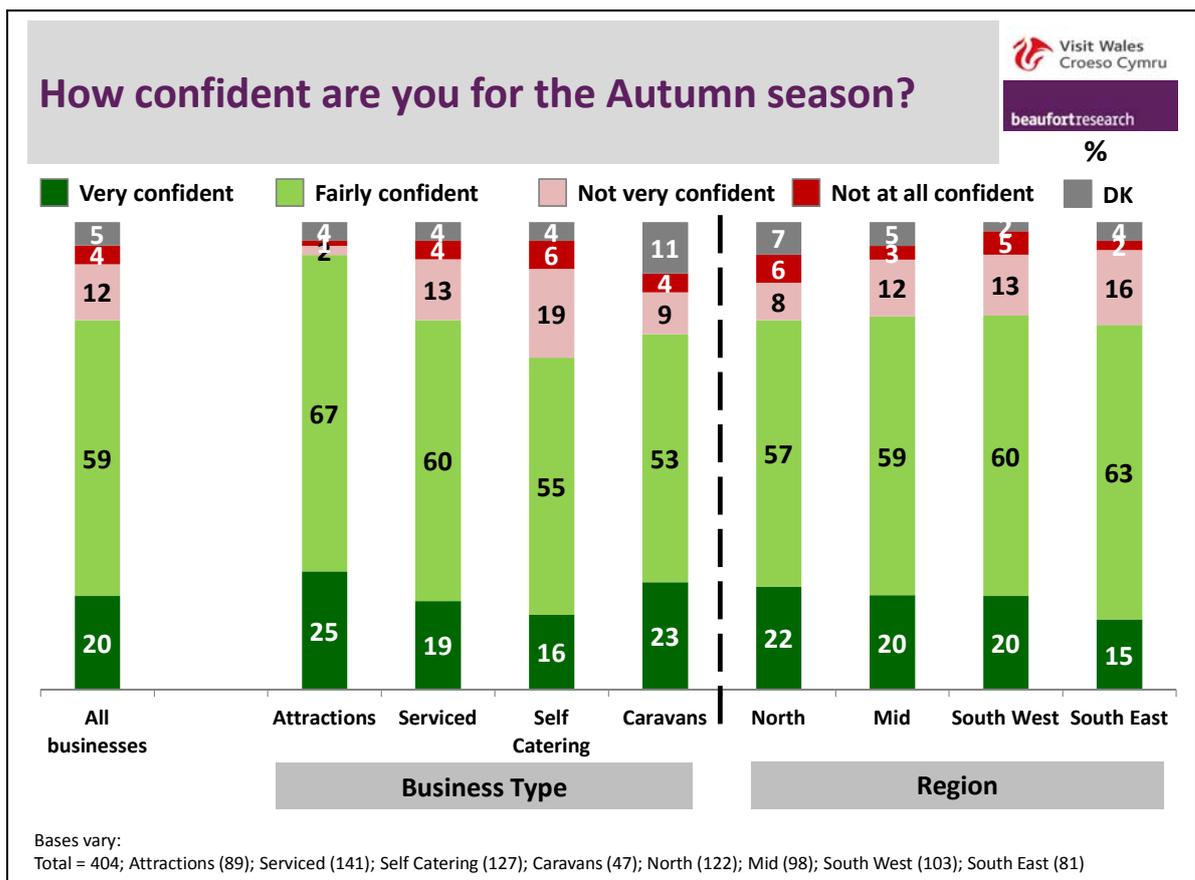
In terms of region, more businesses in North Wales reported an increase in turnover compared to last year (62%), while more businesses in South East Wales reported a decrease (22%). In May the opposite was true, with businesses located in North Wales being most likely to have experienced lower turnover and those in the South East being most likely to have observed greater levels of turnover this May compared to the last.

On the whole, businesses were optimistic about the coming Autumn season – this was also the case at Easter and in May 2013 when they had also been optimistic about the summer season.

Over three quarters (79%) said that they were confident for the Autumn season, with 20% saying they were very confident, and nearly three in five (59%) claiming to be fairly confident. Less than one in five (16%) of the businesses were not confident for the upcoming Autumn, with 12% reporting that they were not very confident, and 4% not at all confident.

Across the different types of business, confidence levels were fairly consistent. Overall, confidence levels were highest amongst attractions (92% confident) and those businesses located in South West Wales (80% confident). A similar scenario was present in May, but then it was the South East that showed the greatest level of confidence (80%) - see Figure 3 below.

Figure 3

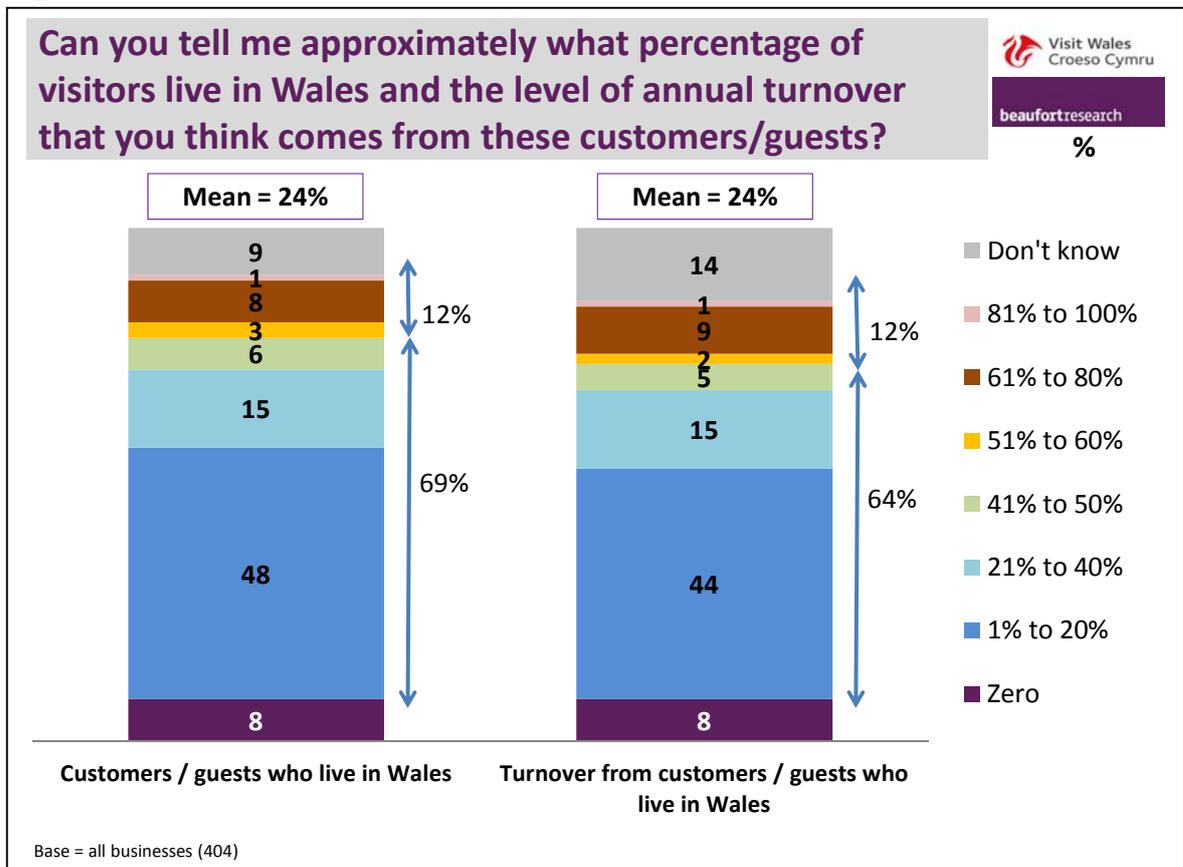


3.2 Welsh Market

All businesses were asked to estimate the proportion of their customers/guests who live in Wales, as well as the percentage of turnover that comes from these visitors. On average, businesses estimate that 24% of the people who visit their business live in Wales. Less than one in ten (8%) said that none of their customers/guests live in Wales, while around half (48%) thought that between 1% and 20% come from Wales. Only 12% of businesses reported that the majority of their customers/guests live in Wales (9% could not comment).

Perhaps not surprisingly, the overall estimations of how much of business turnover is obtained from Welsh residents are similar to the proportions of visitor numbers provided. On average the businesses estimated that 24 % of their turnover comes from people who live in Wales. Over two fifths (44%) indicated turnover estimates from Welsh residents of between 1% and 20%, and a further 15% estimated proportions between 21% and 40%. Overall, 64% estimated that less than half of their annual turnover comes from Welsh residents, while just 12% thought that over half came from Welsh residents – see Figure 4 below.

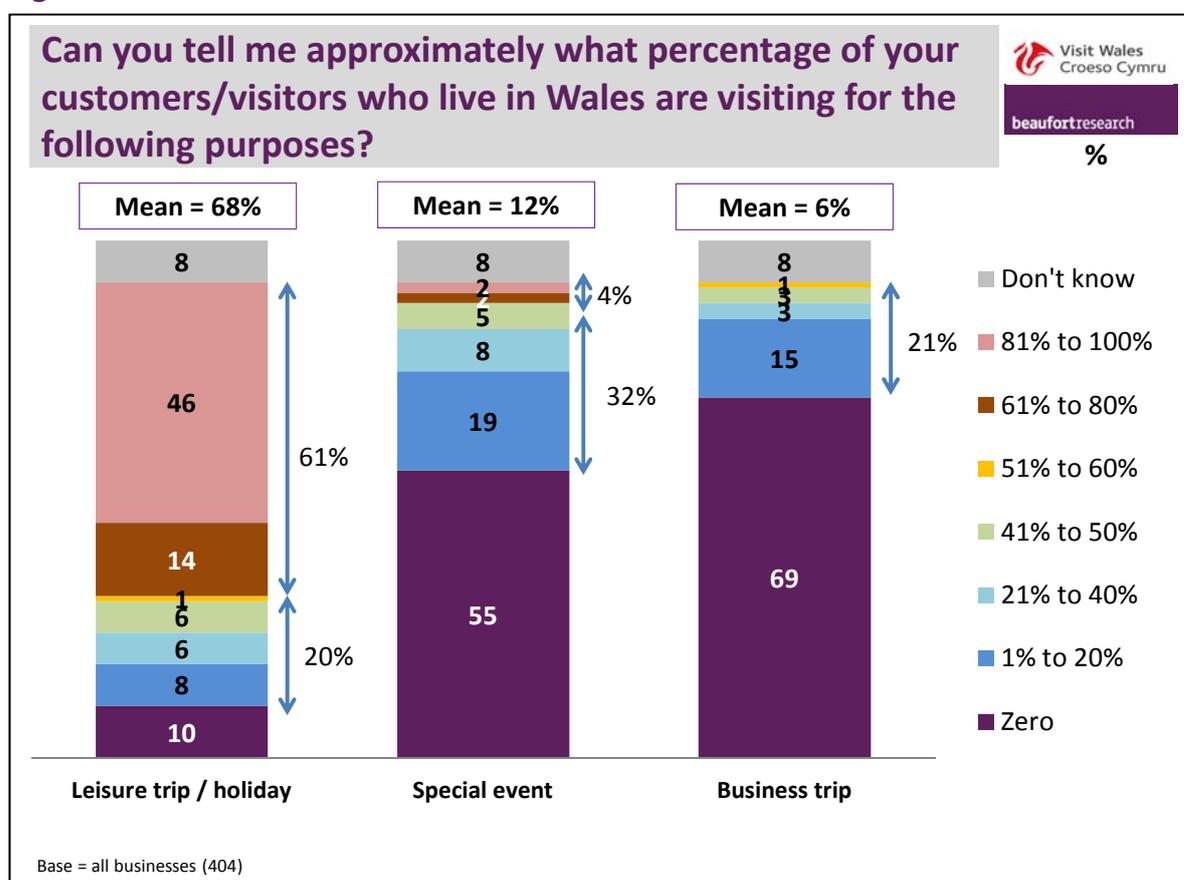
Figure 4



When looking at the purpose for Welsh residents visiting, the businesses generally consider that most are visiting for a leisure trip or holiday rather than for a special event or business trip. On average, businesses estimated that 68% of their customers/guests who live in Wales visit leisure, compared to an average of 12% for special events and just 6% for business trips.

Figure 5 below gives details of the proportions of Welsh customers/guests visiting for each purpose. Over three in five reported that over half of their Welsh customers/guests came for a holiday – only 5% and 1% respectively said that over half of their customers/guests came for a special event; moreover the majority claimed that none of their Welsh customers/guests come for these purposes.

Figure 5

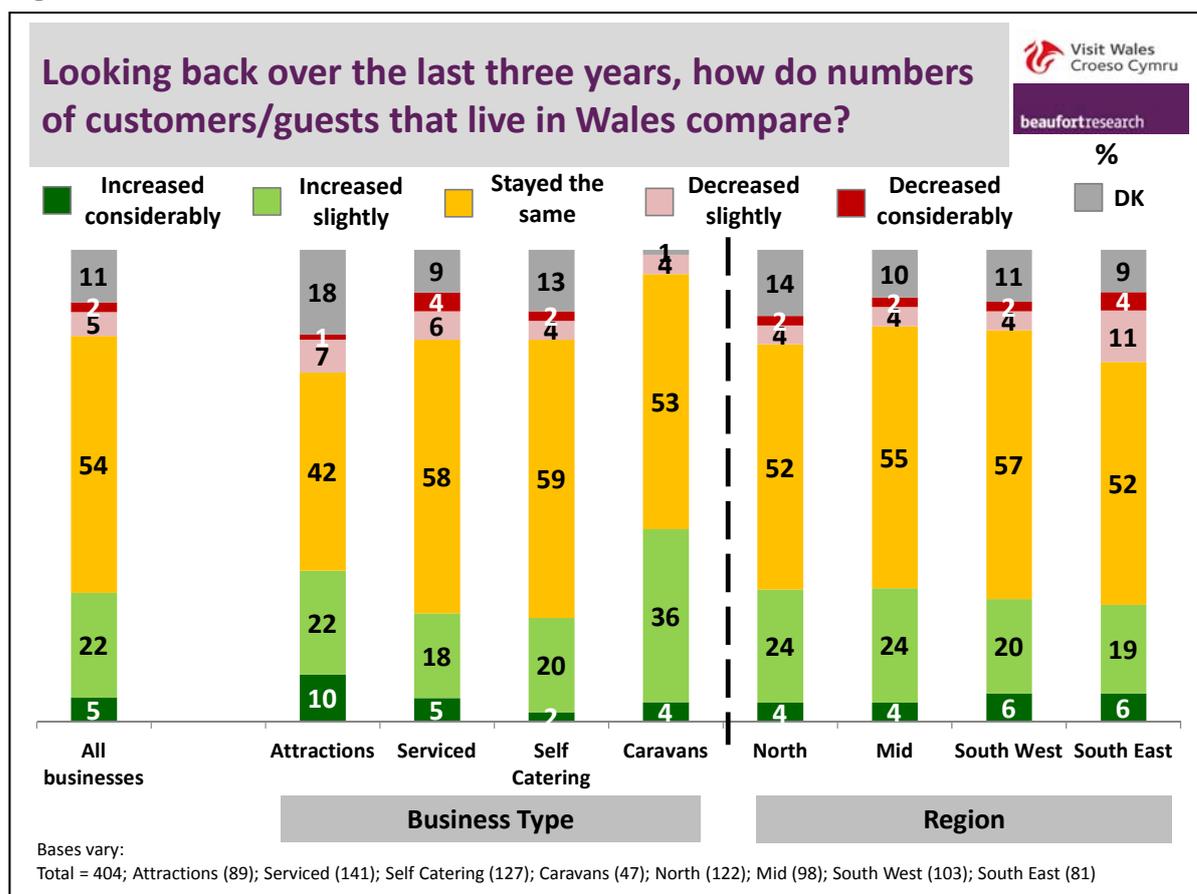


Upon reflecting on the number of Welsh residents received over the last three years, over half (54%) of the businesses thought that numbers had remained the same. However, over a quarter (27%) felt that the number of customers/visitors who live in Wales had increased, with 22% saying there had been a slight increase and 5% a considerable increase.

The pattern across the regions was virtually identical, although a greater percentage of businesses in the South East (15%) felt that the number of Welsh residents visiting had decreased compared to the other three regions (6% for each).

Examining the different business types also indicates similarities; however those in the caravan sector were more likely to state that there had been an increase in Welsh residents visiting, with over a third (36%) saying there had been a slight increase and a further 4% indicating a considerable increase of visitors living in Wales. On the other hand, self-catering businesses were least likely to indicate an increase in this type of visitor, with one fifth (20%) stating there had been a slight increase and just 2% a considerable increase – see Figure 6 below.

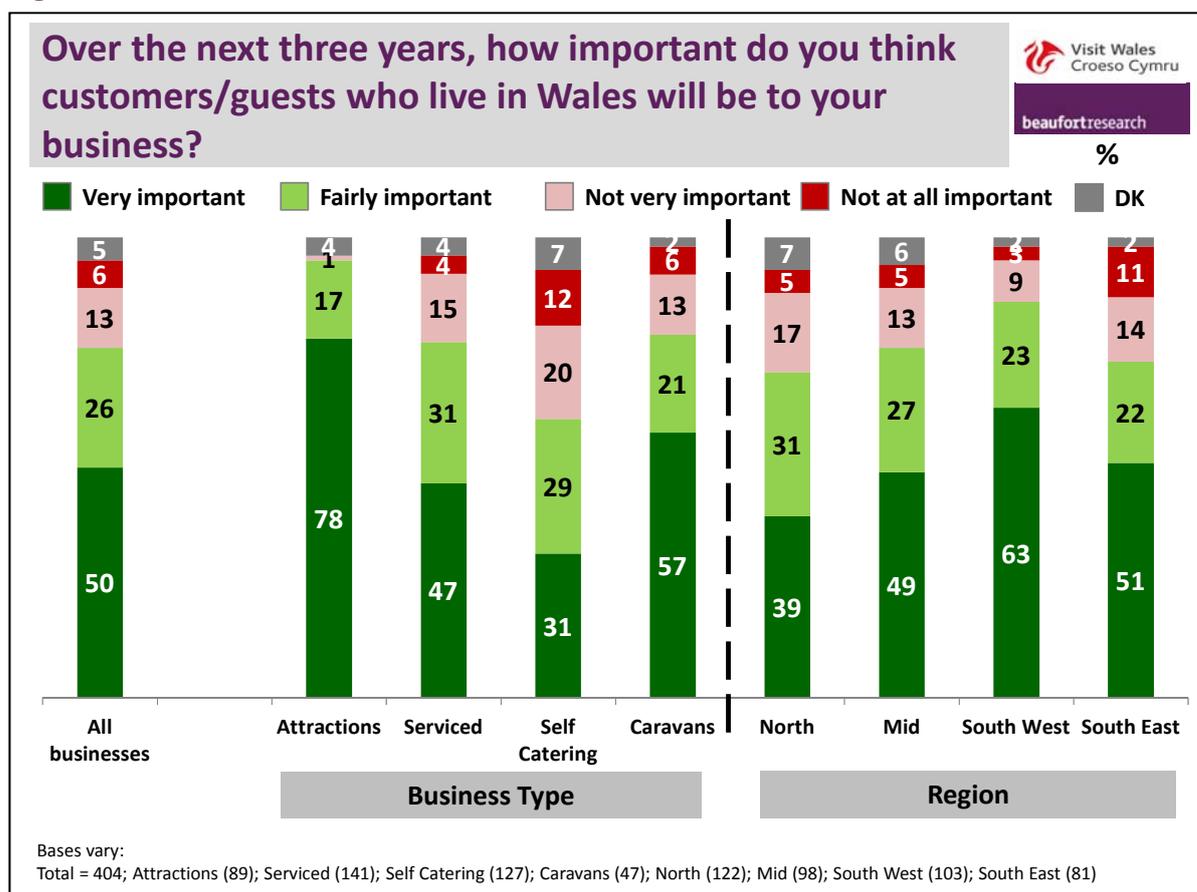
Figure 6



When asked how important Welsh customers/guests would be to their business over the next three years, three quarters (76%) said they will be important, with 50% saying very important and 26% fairly important. Self-catering business viewed Welsh residents as being the least important, with 32% stating they will not be important. On the other hand, only 1% of attractions said Welsh visitors would not be important, and almost four in five (78%) of these businesses thought they would be very important.

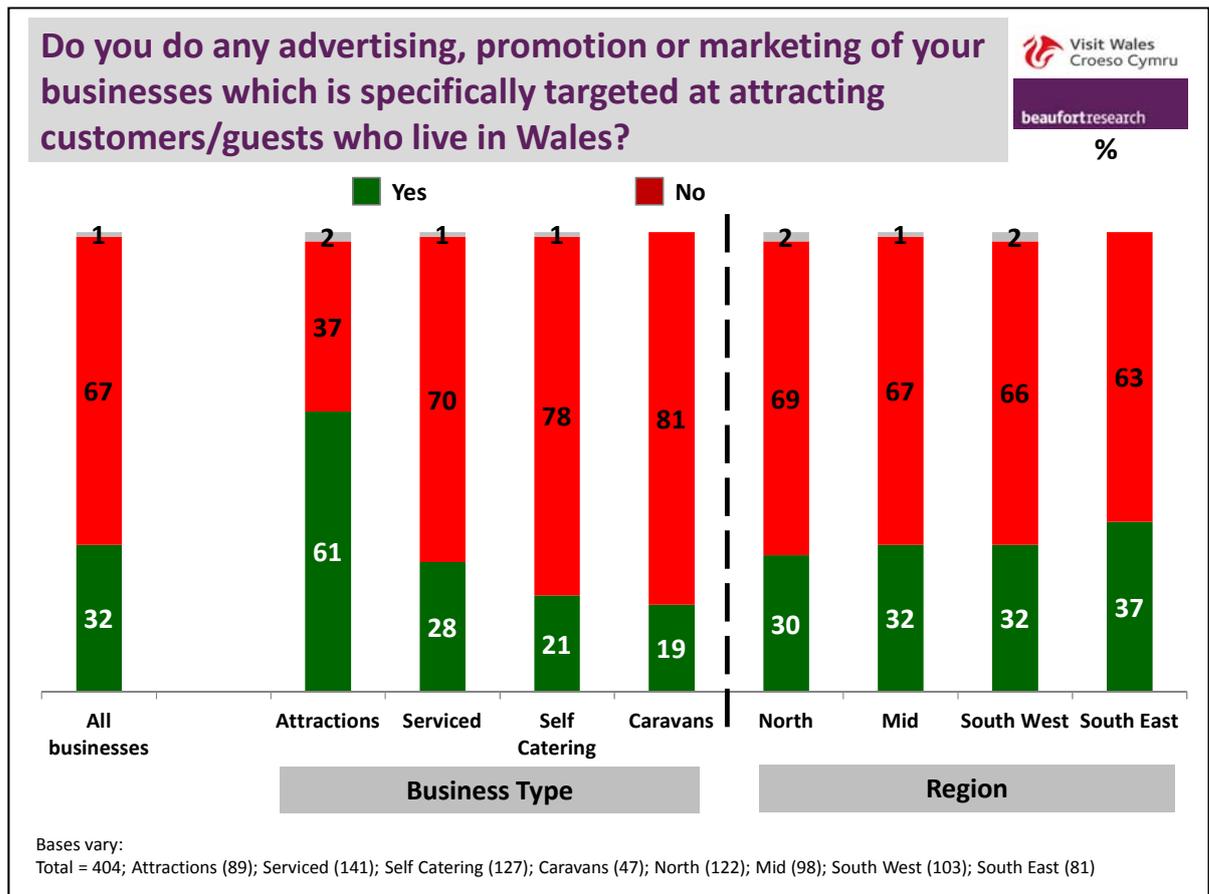
Examining the regions, businesses in South West Wales were more likely to rate Welsh residents as being important over the next three years. In this region, over six in ten (63%) thought they will be very important and a further quarter (23%) that they would be fairly important. By comparison, businesses in South East Wales were more likely to indicate that these types of visitors will not be important (25% compared to 12% in South West Wales) – see Figure 7.

Figure 7



Overall, just less than one third (32%) of businesses are specifically trying to attract Welsh residents. This proportion is fairly consistent across the different regions, with slightly more businesses in South East Wales doing so (37%), and slightly less in North Wales (30%). However, more obvious differences can be observed between the different business types, with 61% of attractions stating they are specifically trying to attract Welsh residents through their marketing and promotional techniques, compared to 19% of caravan businesses, 21% of self-catered accommodation and 28% of serviced accommodation – see Figure 8 overleaf.

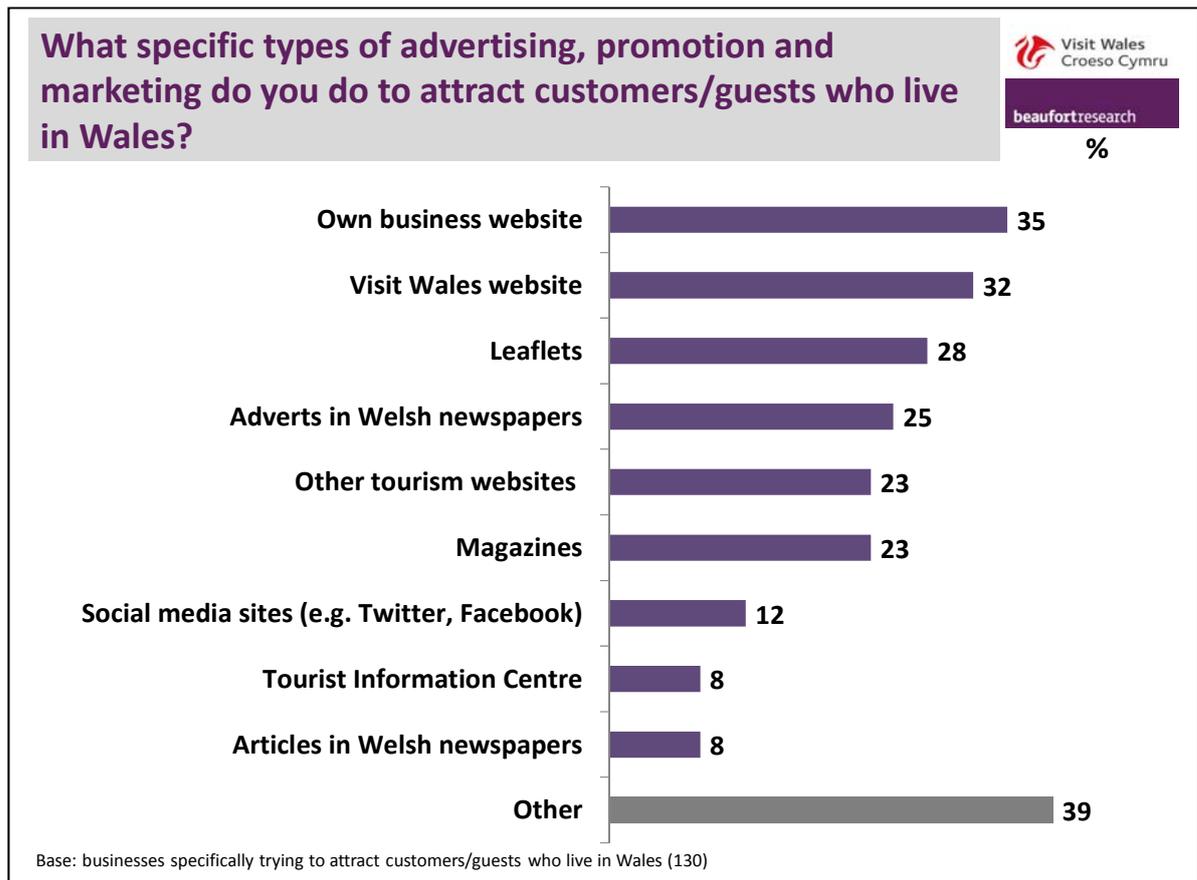
Figure 8



The businesses that are specifically targeting customers/guests who live in Wales were asked to identify the types of marketing and promotions they are using to do so. With over a third (35%) indicating they use their own business website, this was the most common method. A further 32% stated that they use the Visit Wales website, but fewer (23%) explained they use other tourism websites such as lastminute.com and local authority websites. With 28% of the businesses using leaflets and 25% using adverts in Welsh papers, these were also popular options. Methods mentioned by around one in ten businesses included social media websites (12%), Tourist Information Centres and articles in Welsh newspapers (8% for each).

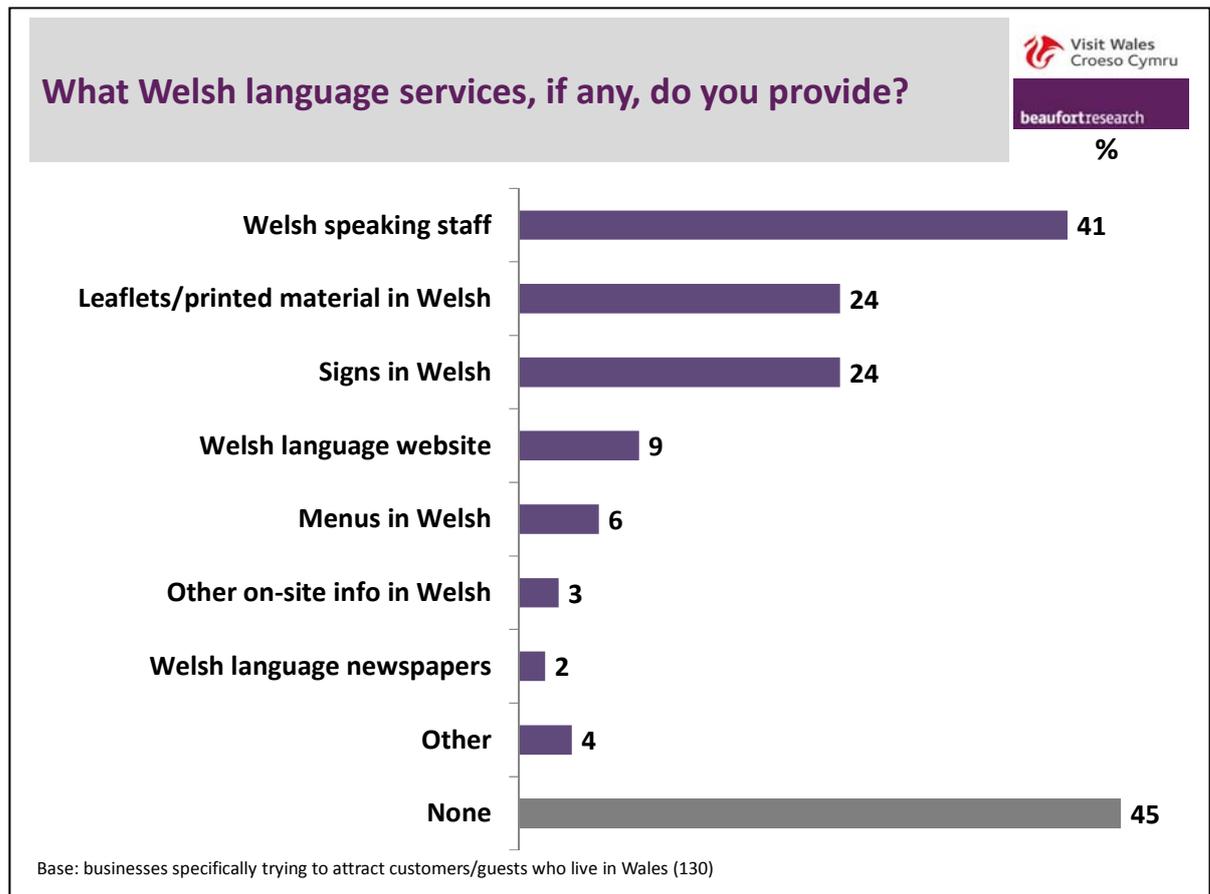
Others included emails, direct mailings, letting agents, tourism companies, smartphone apps, local radio, posters/billboards and local tourism guides - see Figure 9 overleaf.

Figure 9



All businesses were also asked whether they provide any Welsh language services for their customers/visitors. While 45% provided no Welsh language services, over half (55%) claimed they did. Welsh speaking staff was the most common provision offered (41%), while almost a quarter of businesses have leaflets of signs available in Welsh (24% for each). One in ten provide a Welsh language website (9%), and while only a small percentage (2%), have Welsh language newspapers available, a slightly larger proportion have menus available in Welsh (6%) – see Figure 10 overleaf.

Figure 10

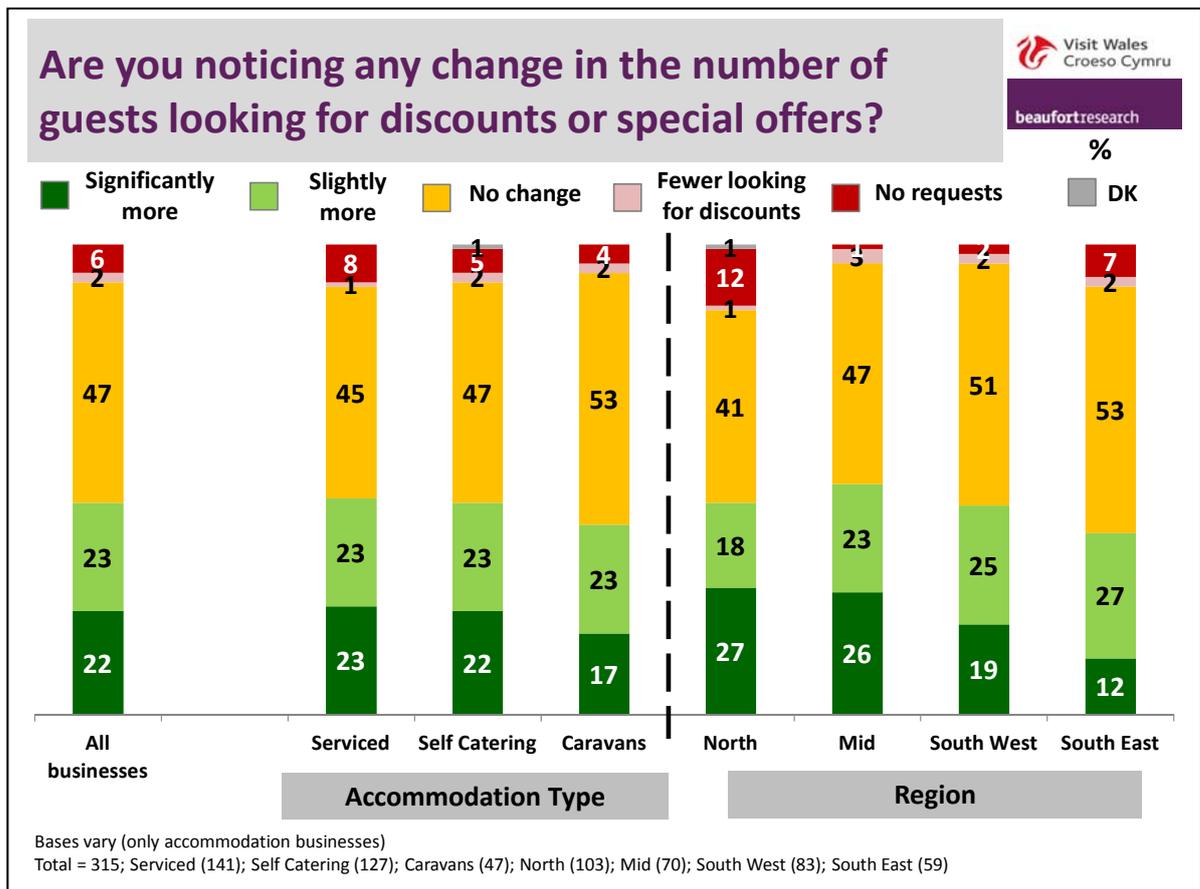


3.3 Discounts and Special Offers

The accommodation providers interviewed were asked if they are noticing any change in the number of guests looking for discounts or special offers. Almost half (47%) felt there had been no change, although a similar percentage (45%) thought more people were looking for discounts, with 22% indicating a significant increase and 23% a slight increase.

Looking at the different accommodation types, the change in the number of guests looking for special offers or discounts is broadly the same, although in the caravan sector, slightly fewer have seen an increase in requests for discounts (40%) compared to serviced (46%) and self-catering accommodation (45%). Again the pattern observed across the different regions is virtually identical, although businesses in the North are most likely to have no requests for discounts at all (12%) – see Figure 11.

Figure 11

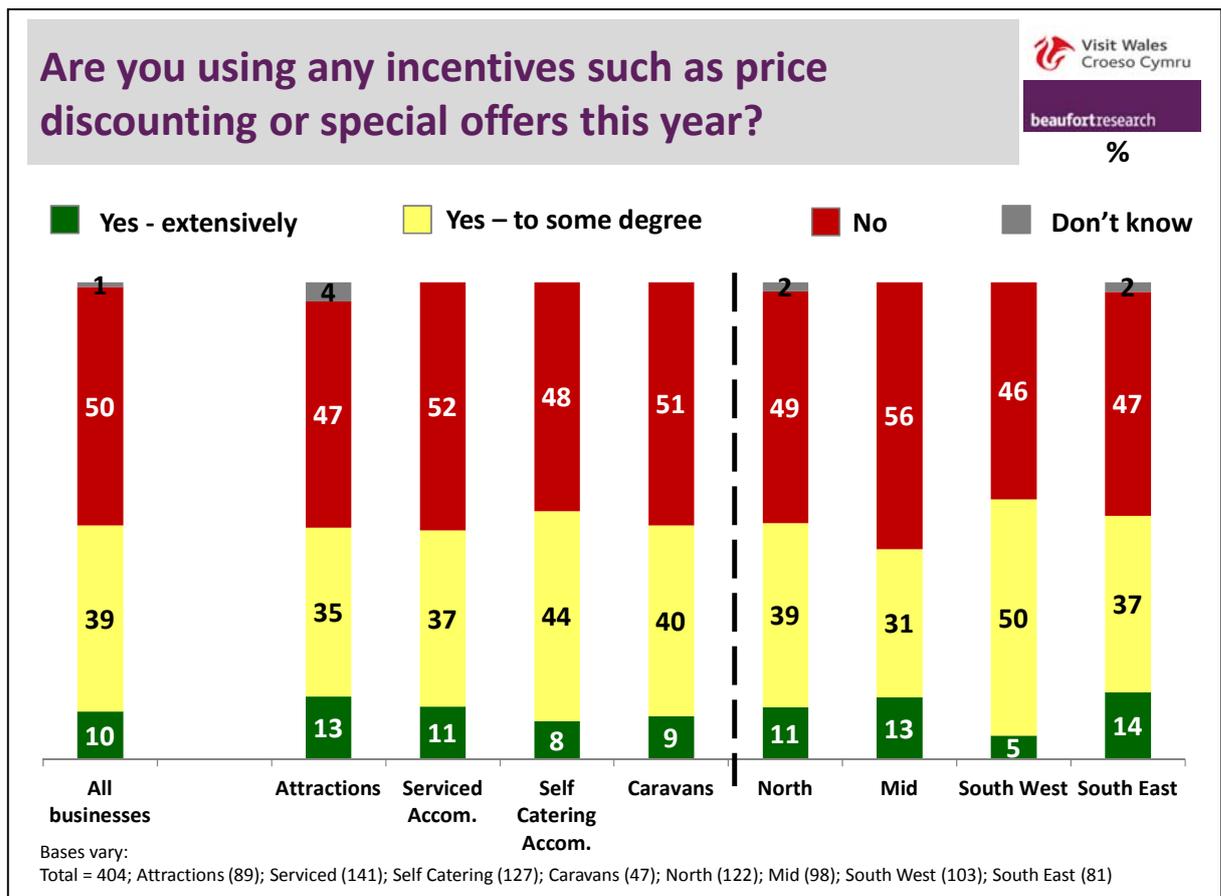


Requests for discounts included customers/guests looking for lower prices when booking late, 3 nights for the price of two, haggling to lower the price and wanting more for their money.

One in ten (10%) of all the businesses interviewed claimed they have been using discounts extensively this year, with a further 39% stating they have used them to some degree. However, over half are not offering price incentives or discounts.

Comparing the different business types and region, attractions are most likely to be using discounts extensively (13%) while self-catering accommodation providers are least likely (8%). Moreover, those businesses located in South East Wales are the most likely to be offered extensive discounts (14%), while only 5% of those located in the South West are doing so – see Figure 12 below.

Figure 12

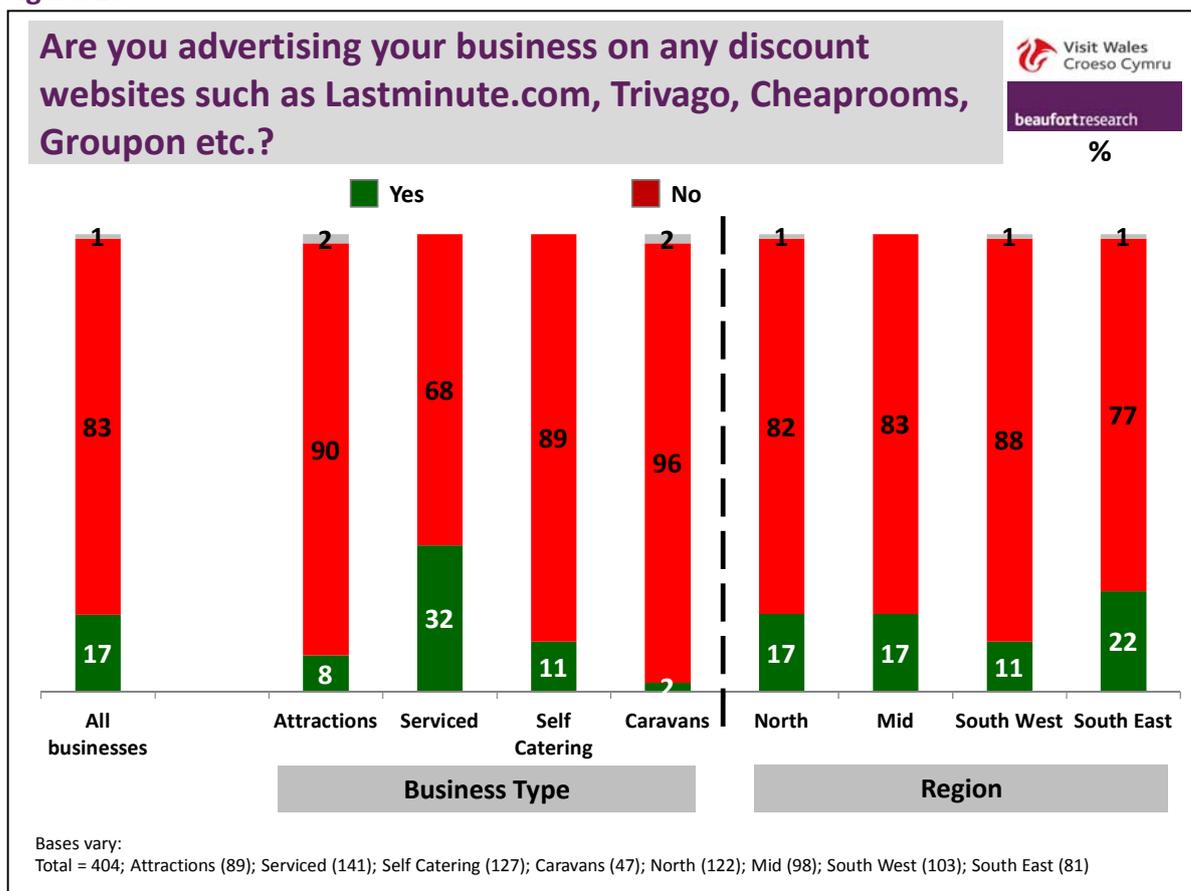


The accommodation providers offering discounts or special offers are using a variety of methods including: lower rates for out of season bookings, late availability discounts and discounts on multiple nights. Similarly, attractions are providing offers such as: two for the price of one, and free admission for children.

When asked specifically whether businesses are advertising on discount websites such as Lastminute.com, Trivago, Cheaprooms and Groupon, less than one in five (17%) indicated they are doing so.

There were differences observed according to business type and region; serviced accommodation providers are the most likely to be using such websites (32%), with caravan businesses being the least likely (2%). Moreover, around one in five (22%) of those businesses in the South East are using such discount websites, compared to just over one in ten (11%) in the South West - See Figure 13 below.

Figure 13



APPENDIX

Survey Questionnaire

VISIT WALES BUSINESS SURVEY 2013 – WAVE 3
FINAL QUESTIONNAIRE (21st AUG 2013)

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

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

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

S1 Can I just check – do you speak Welsh?

Yes – fluently → **S2**

Yes – not fluently → **S2**

No – does not speak Welsh → **Q1**

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

English

Welsh

CORE QUESTIONS

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

Yes (**Go to Q2**)

No (**Go to Q6**)

Q2 Compared with 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

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

WELSH MARKET

Q6 Can you tell me approximately what percentage of your customers/guests live in Wales?

WRITE IN _____

Don't know

Q7 And can you tell me approximately what percentage of your annual turnover comes from customers/guests who live in Wales?

WRITE IN _____

Don't know

Q8 And can you tell me approximately what percentage of your customers/guests who live in Wales are visiting for the following purposes?

READ OUT AND WRITE IN THE NUMBER

A leisure trip / holiday _____ % (Don't know)

Business trip _____ % (Don't know)

Special event _____ % (Don't know)

Q9 Thinking back over the last 3 years, would you say that the number of customers/guests that live in Wales has increased, stayed the same or decreased?

READ OUT

- Increased considerably
- Increased slightly
- Stayed the same
- Decreased slightly
- Decreased considerably

Don't know

Q10 Over the coming 3 years, how important do you think customers/guests who live in Wales will be to your business?

READ OUT

Very important
Fairly important
Not very important
Not at all important

Don't know

Q11 Do you do any advertising, promotion or marketing of your businesses which is specifically targeted at attracting customers/guests who live in Wales?

Yes → **Q12**

No

Don't know



Q13

Q12 What specific types of advertising, promotion and marketing do you do to attract customers/guests who live in Wales?

DO NOT PROMPT – CODE ALL MENTIONED

Your own business' website
Visit Wales website
Other tourism websites (e.g. lastminute.com, Local Authority website)
Smartphone apps (e.g. iPhone, Android)
E-newsletters / emails to welsh residents
Blogs
Social media sites (Twitter, Facebook)
Leaflets
Magazines
Adverts in Welsh newspapers
Articles in Welsh newspapers
Direct mailings to Welsh residents
Tourist Information Centre
Letting agents
Tourism companies
Other (specify)

Don't know

Q13 What Welsh language services, if any, do you provide?

DO NOT PROMPT – CODE ALL MENTIONED

Welsh speaking staff
Welsh language newspapers
Welsh language website
Leaflets / printed material in Welsh
Signs in Welsh
Menus in Welsh
Other on-site information in Welsh (specify)
Other (specify)

None

Don't know

DISCOUNTS

ACCOMMODATION PROVIDERS ONLY

Q14 Are you noticing any change in the number of guests looking for discounts or special offers?
READ OUT

Significantly more people looking for discounts → **Q15**

Slightly more people looking for discounts → **Q15**

No change → **Q16**

Fewer people looking for discounts → **Q15**

No requests for discounts → **Q16**

Don't know → **Q16**

Q15 **(IF CHANGE AT Q14)** - What changes are you noticing in the level of discounts? **PROBE** Anything else?

RECORD VERBATIM

Don't know

ASK ALL

Q16 Are you using any incentives such as price discounting or special offers this year?
READ OUT

Yes – extensively

Yes – to some degree

No

Don't know

Q17 **(IF YES AT Q16)** – What discounts or incentives are you offering? **PROBE** Anything else?

RECORD VERBATIM

Don't know

Q18 Can I just check, are you advertising your business on any discount websites such as Lastminute.com, Trivago, Cheaprooms, Groupon etc?

Yes - specify

No

Don't know

CORE QUESTIONS

Q19 Which of the following best describes your location?

READ OUT – SINGLE CODE

Seaside

Urban

Inland

Don't know

Q20 Finally, 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

Q21 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.