



REPORT

Visit Wales
Business Wave Survey 2011

Wave 5 – Autumn



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Copy of Questionnaire	

1. Headline Findings

Mixed autumn period

- 1.1 The tourism industry in Wales has had a mixed autumn period. Overall, about one in four (23%) businesses report increased visitors compared to last autumn and about two in five (42%) report the same level. However, one in three (33%) report a decrease.
- 1.2 The economic climate is still the dominant factor affecting performance, with seven in ten (71%) businesses with reduced visitors stating it as a key factor.
- 1.3 Attractions have fared ok, with over a quarter (28%) increasing their visitor numbers and about two in five (39%) maintaining the same level. Serviced accommodation has had a difficult period however, with two in five (40%) businesses reporting decreased visitor levels.
- 1.4 Differences by region are not significant.

Advance bookings down in all markets

- 1.5 Advance bookings compared to this time last year are down in all markets. A minority (12%) of accommodation businesses have increased bookings from visitors from Wales, but a third (32%) report a decrease.
- 1.6 About one in six (16%) businesses have increased bookings from the UK outside Wales, but about a third (31%) report a decrease.

Recycling, energy and water conservation are actively practised

- 1.7 Nearly all (94%) businesses interviewed actively do recycling, and half (50%) practise energy or water conservation.
- 1.8 The most significant barrier to implementing environmentally measures in the business is cost – stated by about one in three (31%) respondents.

Public transport timetables widely available

- 1.9 Most (78%) businesses interviewed make public transport timetables available at their premises.

High level of local sourcing

- 1.10 The majority (61%) of businesses say that more than 75% of their goods and services are sourced locally.

Confidence levels typical for this time of year

- 1.11 About one in ten (9%) of those open for business this winter say they are 'very confident' for the season, and over half (56%) say they are 'fairly confident'. Confidence is quite seasonal, and these levels are typical for this time of year.

2. Research Background

Objectives

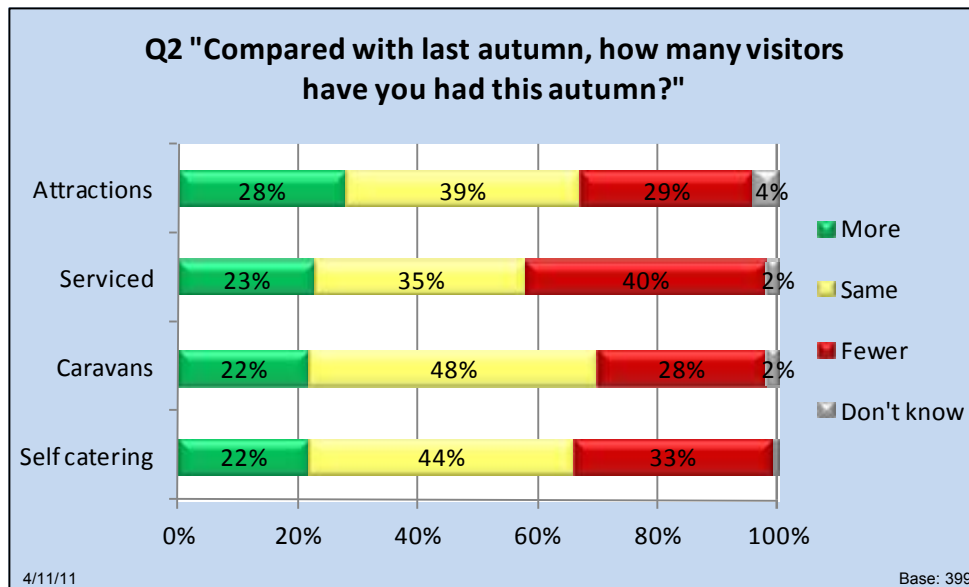
- 2.1 This survey is the fifth and final wave in the 2011 'Business Wave Survey', which aims to measure business performance and confidence in the Welsh tourism industry over the main holiday periods. This final wave focuses on the autumn season and immediately follows the school autumn half term.
- 2.2 The main objectives of this final wave are to measure:
 - Business performance during the autumn
 - Perceived reasons for relative success or failure this period
 - Advance bookings
 - Environmental policies and accreditations
 - Environmentally friendly practices
 - Sourcing of local goods and services
 - Confidence for the winter season

Methodology & Sampling

- 2.3 Strategic Marketing and Visit Wales worked together to design a questionnaire for telephone interviewing. A copy of the marked-up questionnaire is included as an appendix.
- 2.4 Visit Wales provided Strategic Marketing with a database of all graded accommodation businesses in Wales and all known visitor attractions. A sample structure was designed to be representative of the tourism industry in Wales by sector and region.
- 2.5 A total of 407 interviews have been completed by telephone with business owners or managers between 31st October and 4th November. The table below shows the number of interviews by region and sector:

Sector / Region	North Wales	Mid Wales	South West Wales	South East Wales	Total
Attractions	25	10	20	25	80
Serviced	40	26	25	29	120
Self catering	42	25	35	21	123
Caravan & campsites	35	21	22	6	84
Total	142	82	102	81	407

3. Autumn Performance



- 3.1 The tourism industry in Wales has had a mixed autumn period. Overall, about one in four (23%) businesses report increased visitors compared to last autumn and about two in five (42%) report the same level. However, one in three (33%) report a decrease.

"We've had a really good period - income and visitor numbers are up. Our Castle Key scheme has been really successful and is the main reason"
Cardiff Castle

Economic climate is still a problem

- 3.2 The economic climate is still the dominant factor affecting performance, with seven in ten (71%) businesses with reduced visitors stating it as a key factor.
- 3.3 Operators have commented that the second holiday has been hit, or people are staying for shorter lengths of time. When they do go away, they want to do it as economically as they can.

"People are generally cutting back on luxuries. I think people are trying not to spend if they don't have to and if they do have to buy something then they look for the best deal possible"
Caravan park, North

"People seem to be cutting back on taking second holidays. They are limiting themselves to just one a year and trying to save as much money as possible"
Self catering, North

“Customers often have two holidays a year. With the current financial situation the British holiday is the first to go”

Self catering, North

“We have had short breaks instead of full weeks”

Self catering, North

Some businesses are bucking the trend

3.4 The economic climate is harsh, but there is still plenty of opportunity for businesses which have something unique to offer and work hard to promote it.

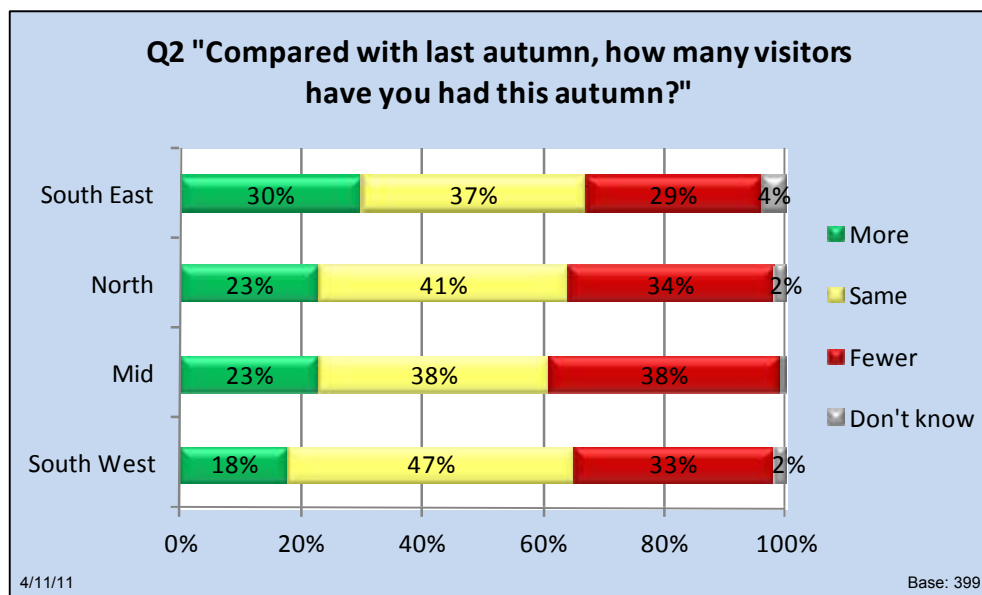
“I have a brilliant product and a brilliant service. You work hard and you have a good idea”

Self catering, North

“We’re up 50% on last year”

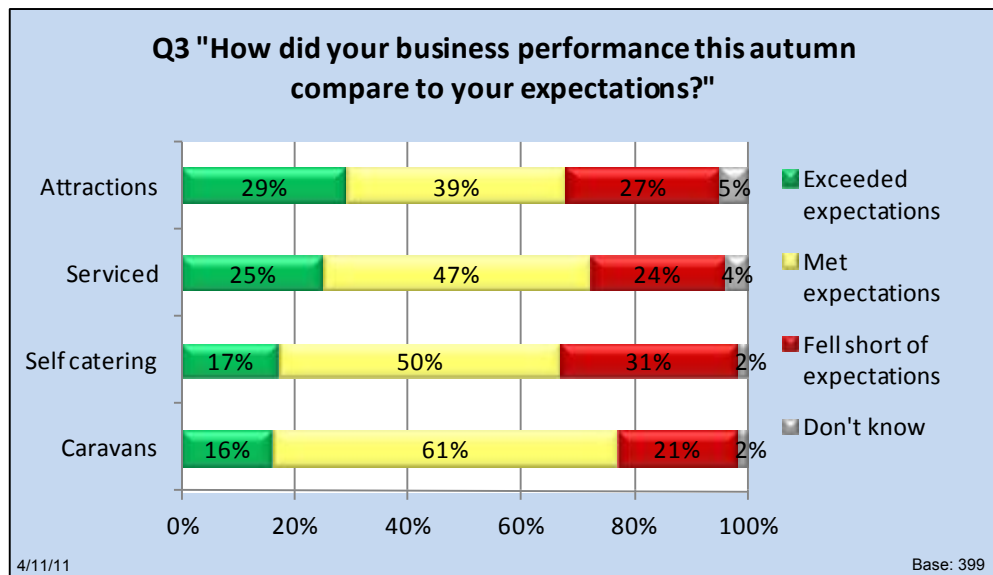
Attraction, South East

Differences by region



3.5 Differences by region are not very significant this wave.

Performance compared to expectations

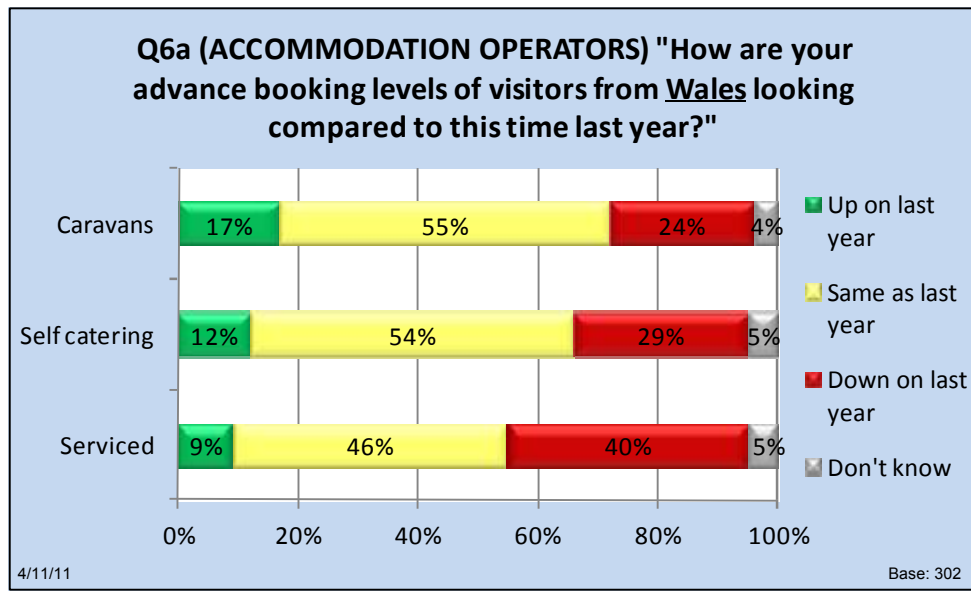


Autumn about on par with expectations

- 3.6 The autumn has not been a great period for the industry, but operators generally hadn't expected it to be.
- 3.7 Notably, in the serviced sector, performance has been quite poor this autumn but the majority (72%) say that performance met or exceeded their expectations. There is a general feeling that it could have been much worse.

4. Advance Bookings

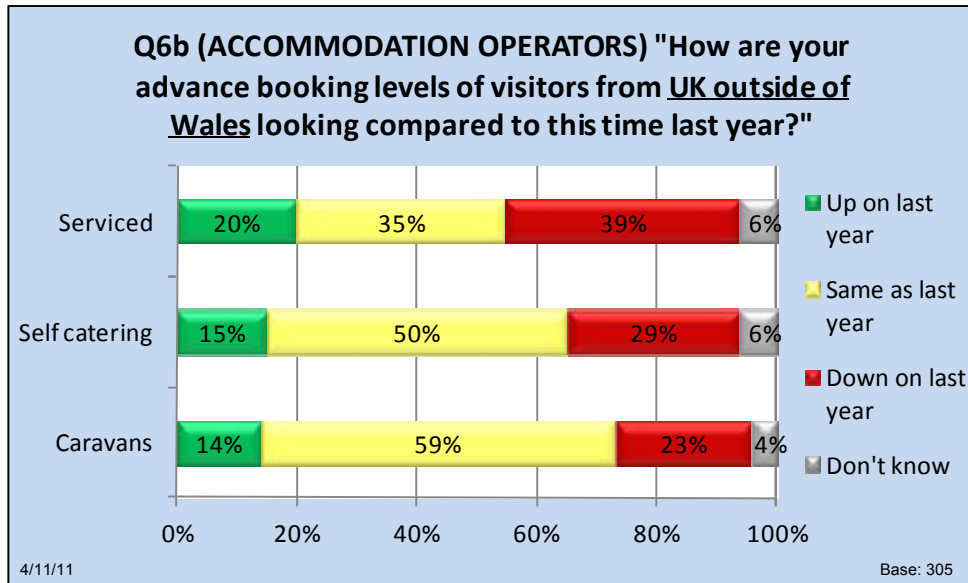
Visitors from Wales



- 4.1 Advance bookings from visitors from Wales are down in all sectors, especially serviced accommodation. This is reflected across all regions of Wales.

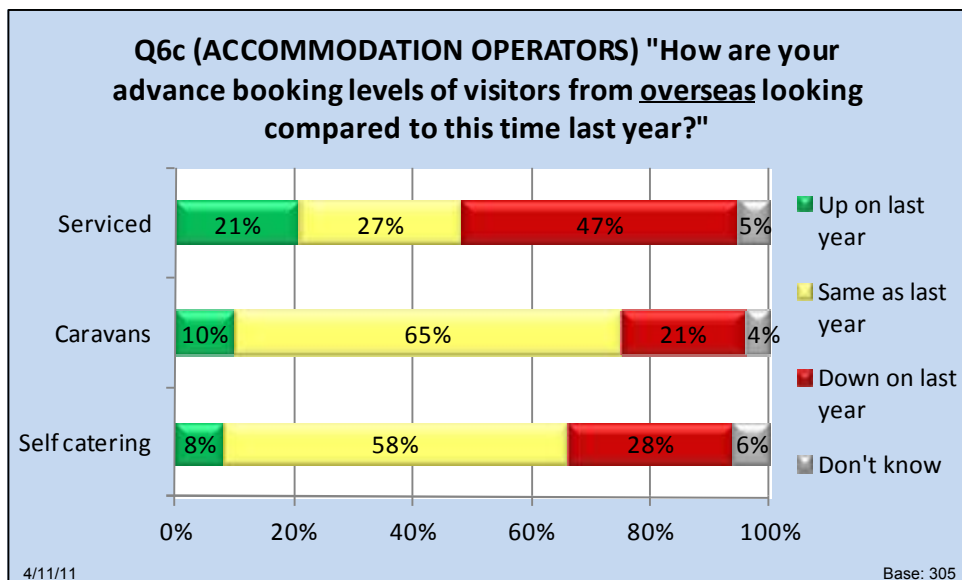
"We have been open for 19 years and this is the first time that I have no bookings for Easter or Whitsun"
Serviced, Mid

UK Visitors



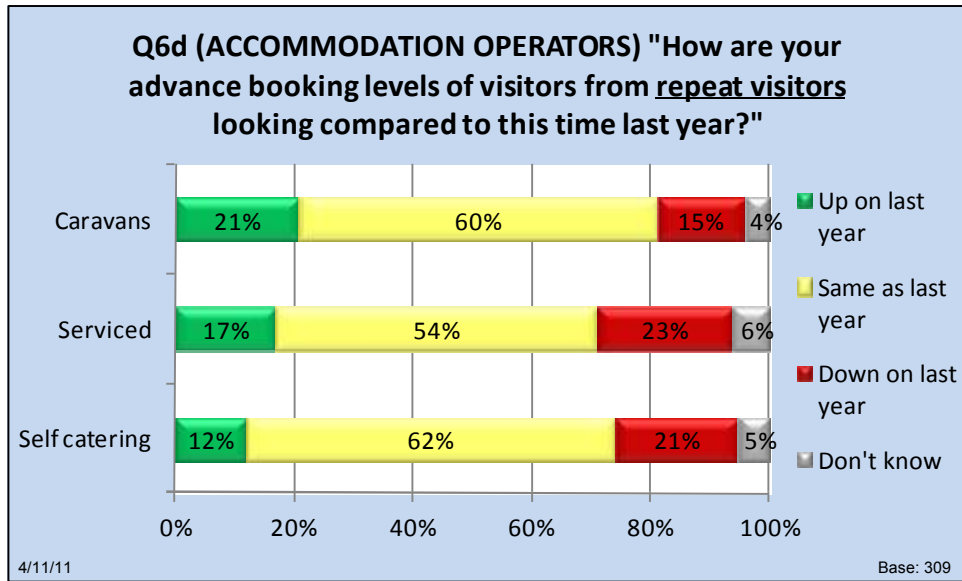
- 4.2 Advance bookings from UK visitors are also down in all sectors. The figures are very similar for all regions of Wales.

Overseas Visitors



- 4.3 Overseas bookings are also down across the board for those businesses which receive overseas custom.

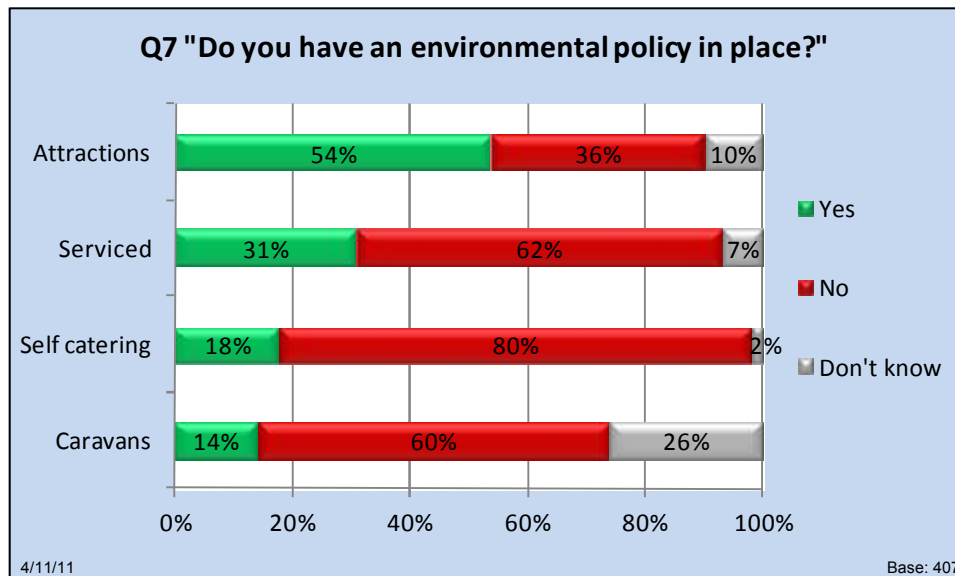
Repeat Visitors



- 4.4 Repeat visitors bring a degree of stability to the industry during challenging times.

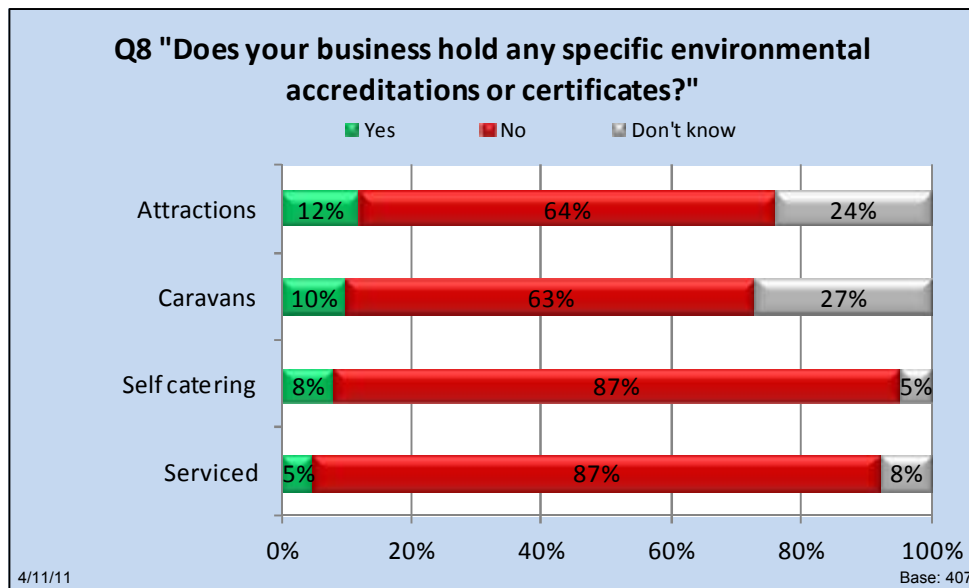
5. Environmental Policy and Accreditation

Environmental policy



- 5.1 Overall, just over a quarter (28%) of businesses interviewed say they have an environmental policy in place. Incidence is highest in the attractions sector, where over half (54%) have a policy.
- 5.2 There is also a significant difference between south east Wales and the rest of the country. About half (48%) of businesses in the south east have a policy, compared to a much lower proportion (23%) in the rest of Wales.

Accreditation



- 5.3 A minority (8%) of businesses interviewed have an environmental accreditation / certificate. The high proportion (14%) of 'don't knows' is partly due to the lack of awareness of what an environmental accreditation is, and so these respondents could be assumed not to have one.

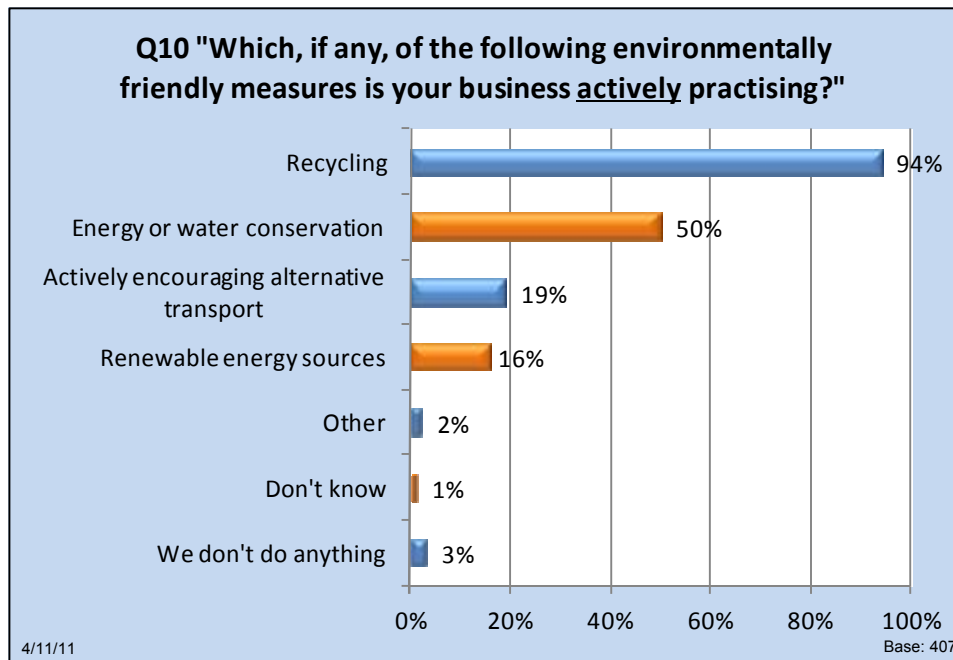
"We don't have any certifications regarding our efforts to be environmentally friendly but we try to do what we can since we are rural people"
Self catering, South West

Green Dragon

- 5.4 Most of those with an accreditation have the Green Dragon award – generally, level 2.

6. Environmentally Friendly Measures

Measures actively practised



- 6.1 Nearly all (94%) businesses interviewed actively do recycling, and this is consistent across all regions and sectors.

Energy / water conservation higher in self catering, serviced and in south east

- 6.2 Half (50%) of businesses actively conserve energy or water, but this varies by sector and region.
- 6.3 By sector, incidence is higher in self catering (59%) and serviced (54%) than in caravan & campsites (42%) and attractions (41%).

"We use low energy bulbs and extra loft insulation; thermostatic valves on central heating"
Self catering, North

"We use low flush toilets, and showers instead of baths. We use energy saving light bulbs"
Self catering, North

- 6.4 By region, more businesses conserve energy or water in the south east (64%) compared to south west Wales (35%).

Encouraging alternative transport varies by region and sector

- 6.5 About one in five (19%) businesses say they actively encourage customers to use alternative transport to the car.
- 6.6 Results seem to vary according to practicalities. Just a minority (2%) of caravan & campsites encourage alternative transport, presumably because of the need to tow a caravan or transport large amounts of camping equipment.
- 6.7 Incidence is much higher in north Wales (29%) and the south east (27%), than in mid (9%) and south west Wales (7%). This relates to the availability and frequency of public transport services close to where the business is located.

Rural, environmentally friendly and proud of it

- 6.8 A number of comments suggest that being environmentally friendly is an integral part of the rural way of life.

“We are country people. We try to be kind to the environment”
Caravan park, North

“We try and be as environmentally friendly as possible. We look after the relationship between aphids and ladybirds”
Caravan park, South East

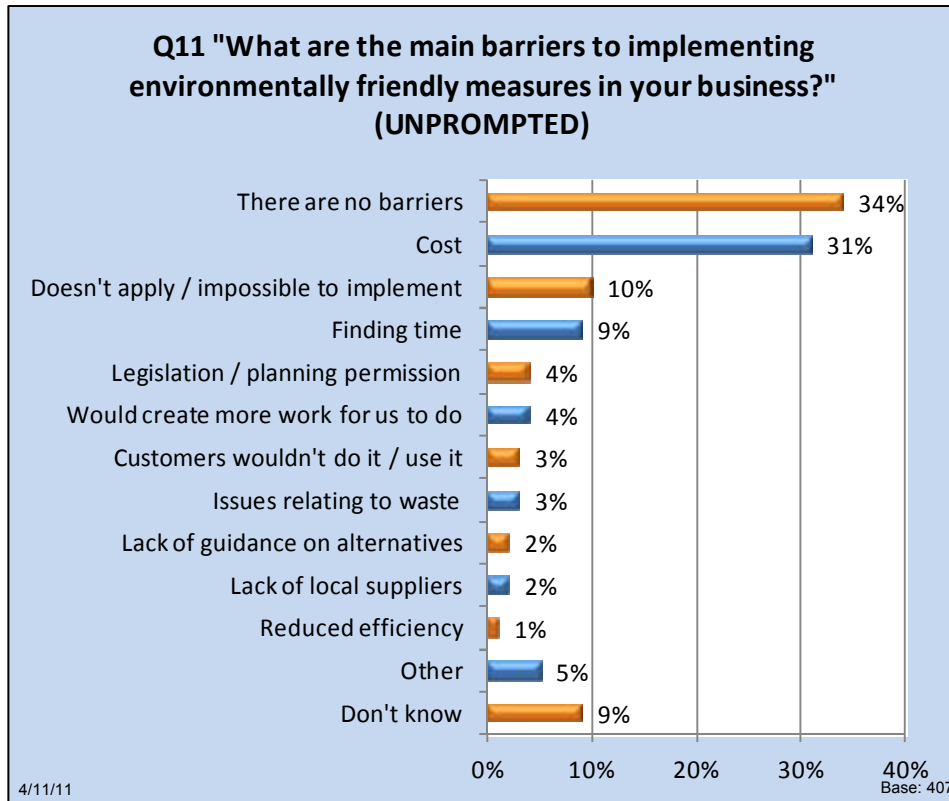
“We’re a very environmentally friendly site. 20 acres of land, famed for its wildlife”
Caravan park, South West

Looking into renewable energy

- 6.9 Some (16%) businesses use renewable energy sources, and others are looking into it.

“We are looking to implementing solar panels”
Caravan park, Mid

Barriers to implementation



- 6.10 A third (34%) of businesses see no barriers to implementing environmentally friendly measures.

"I think with regards to the environmental policies there aren't really many barriers because there is so much help out there if you look for it. For example we do litter picking with the local children and scout groups; people really do like to get involved"

Attraction, South East

Cost if the most significant barrier

- 6.11 Cost is the most significant barrier to the industry. This is consistent across all region and sectors.

"Government cut back on solar panel feedback tariffs has made it non economical to install solar panels"

Self catering, North

"We would add solar panels and improve the insulation but we are not getting enough bookings to justify spending the money"

Self catering, Mid

Would do more if we could

- 6.12 One in ten (10%) respondents say that some measures are impossible to implement. This includes not being able to recommend public transport because of none being available in the area.

“The public transport is inadequate for this region so there is no point in promoting it”

Self catering, North

“Public transport needs to improve for alternatives to work effectively”

Attraction, South East

“We’re in the middle of nowhere so it is best people use their car. We have no train station and the bus only runs once a day”

Serviced, South East

Legislation / planning permission

- 6.13 Some plans to be more environmentally friendly are blocked by legislation or planning permission. Reasons include national park legislation, planning permission for renewable energy and restrictions on listed buildings.

“We are in a national park so there are restrictions on renewable sources such as solar panels and turbines. There are more hoops to jump through”

Self catering, North

“We live in a conservation area so are refused permission. We have applied many times but with no success”

Self catering, North

“The council are quite restrictive with permission for renewable sources”

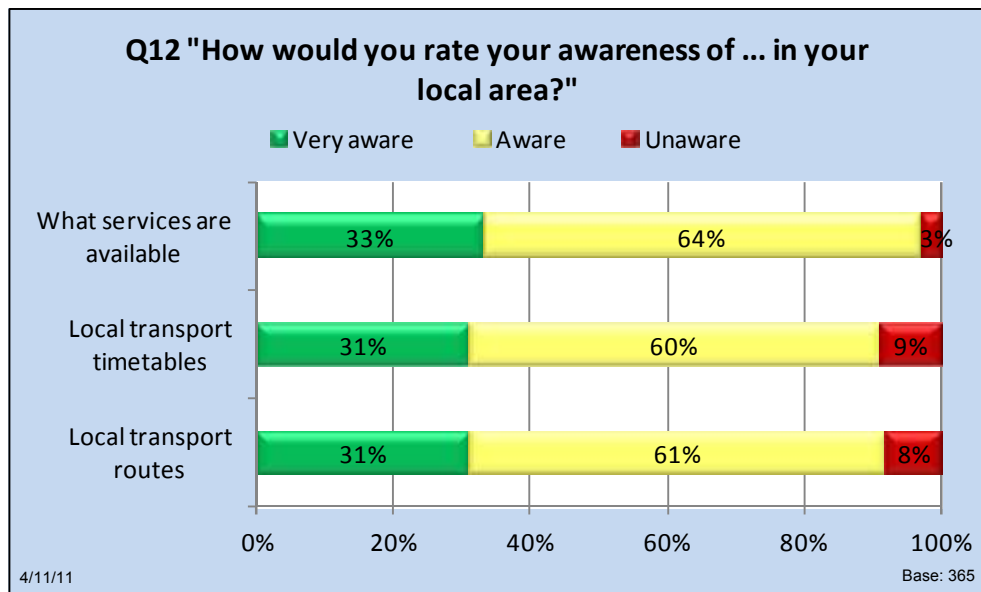
Self catering, South West

“We’re a listed building so can’t do the measures we’d like to”

Attraction, South East

7. Public Transport

Awareness of services

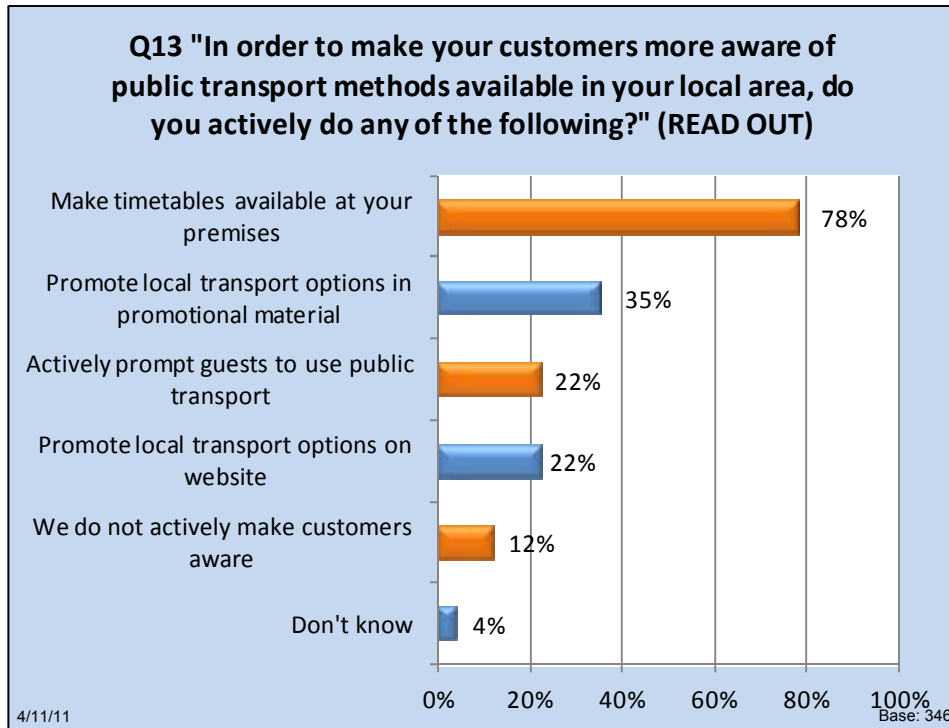


7.1 Awareness of public transport services is generally quite high.

Awareness appears to be higher where public transport is more viable

- 7.2 Results vary by region and sector, and these variations appear to correlate with differences in the viability of public transport as an alternative.
- 7.3 Just one respondent in the caravan & camping sector has said they are 'very aware' of what services are available, compared to about two in five (41%) businesses across the other three sectors.
- 7.4 About half (49%) of businesses in south east Wales say they are 'very aware' of what services are available. This compares to about one in four (26%) in mid Wales.

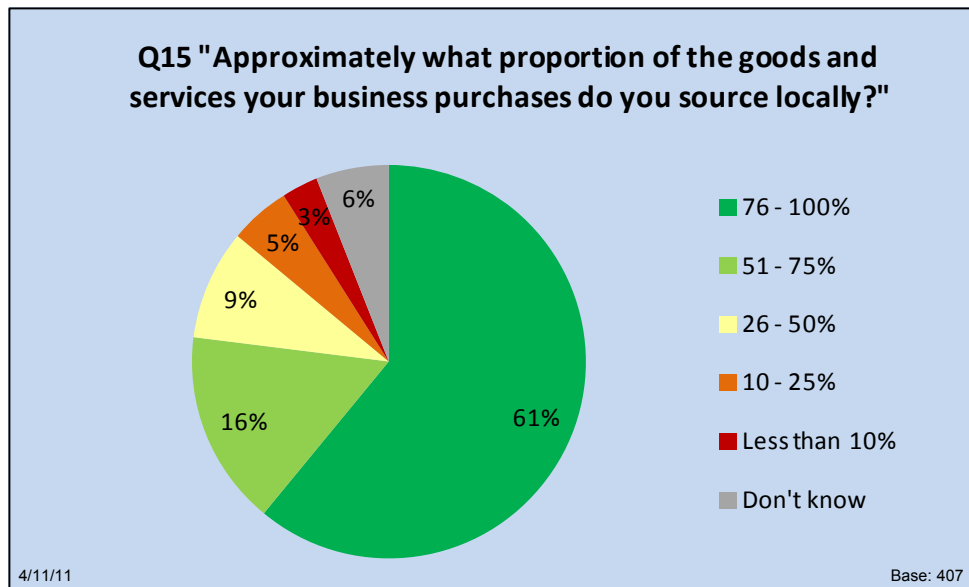
Making customers aware



- 7.5 A high proportion (78%) of businesses make timetables available at their premises. This is more so the case in the accommodation sector, where the vast majority (84%) do this, compared to attractions, where half (50%) do so.
- 7.6 Throughout the other methods of making customers aware of public transport given in the above chart, incidence is lower in the caravan & camping sector and in mid Wales, for reasons discussed previously.

"Lack of public transport to us"
Attraction, Mid

8. Sourcing Local Goods and Services



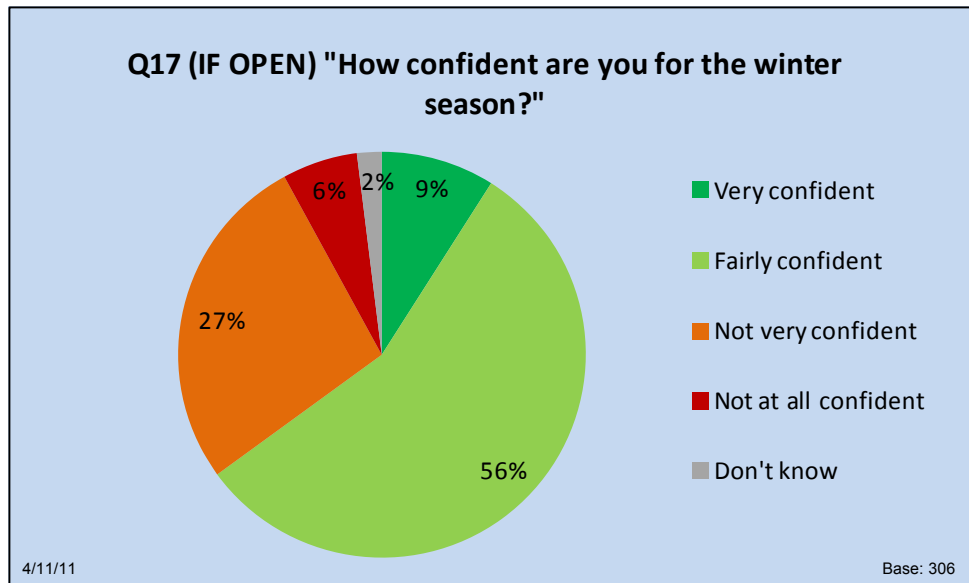
- 8.1 Commitment to sourcing goods and services locally is high. About three in five (61%) respondents say they source more than 75% of their goods and services locally.

Local sourcing is much higher in serviced and self catering

- 8.2 Differences by sector are significant. Local sourcing is very high in self catering, where most (78%) respondents source more than 75% of their goods/services locally, and in serviced accommodation, where the majority (70%) do so. This compares to caravan & campsites (52%) and attractions (31%).

9. Confidence for the Winter

- 9.1 Three in four (75%) businesses will be open for at least some of this winter. These businesses have been asked about their confidence for the winter season.



Confidence levels typical for this time of year

- 9.2 About one in ten (9%) of those open for business this winter say they are 'very confident' for the season, and over half (56%) say they are 'fairly confident'. Confidence is quite seasonal, and these levels are typical for this time of year.

"We're confident about the rest of the year but are trying to be cautious just in case"

Attraction, South East

"We're confident for the rest of year because we already have workshops booked in with schools and other associations"

Attraction, South East

Visit Wales

Business Wave Survey - Wave 5 "Autumn"

Region

<i>North Wales</i>	142
<i>Mid Wales</i>	82
<i>South West Wales</i>	102
<i>South East Wales</i>	81

Type

<i>Attraction</i>	80
<i>Serviced</i>	120
<i>Self-catered</i>	123
<i>Caravan / Campsite</i>	84

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

<i>Yes</i>	98%	Go to Q2
<i>No</i>	2%	Go to Q7

Q2 Compared with last autumn, how many visitors have you had this autumn?

<i>More than last year</i>	23%
<i>Same as last year</i>	42%
<i>Fewer than last year</i>	33%
<i>Don't know</i>	2%

Q3 And how did your business performance this autumn compare to your expectations?

<i>Exceeded expectations</i>	22%
<i>Met expectations</i>	49%
<i>Fell short of expectations</i>	26%
<i>Don't know</i>	3%

Q4 (IF MORE) Why would you say you have had more visitors? (DO NOT PROMPT)

<i>More British people staying in the UK</i>	20%
<i>Own marketing</i>	19%
<i>Upturn in tourism</i>	15%
<i>Better weather</i>	14%
<i>Repeat business</i>	14%
<i>Events in the area</i>	9%
<i>Improved rooms/facilities</i>	8%
<i>Increased capacity</i>	4%
<i>Recommendations</i>	3%
<i>More overseas visitors</i>	1%
<i>Don't know</i>	11%
<i>Other</i>	5%

Q5 (IF FEWER) Why would you say you have had fewer visitors? (DO NOT PROMPT)

<i>Economic climate</i>	71%
<i>Downturn in tourism in the area</i>	8%
<i>Strong competition</i>	7%
<i>Unforeseen problems</i>	4%
<i>Didn't promote the business</i>	2%
<i>Business winding down</i>	2%
<i>Fewer overseas visitors</i>	1%
<i>Don't know</i>	10%
<i>Other</i>	10%

Q6 (ACCOMMODATION OPERATORS) How are your advance booking levels of visitors from ... (READ FROM LIST) looking compared to this time last year?

	<i>Up on last year</i>	<i>Same as last year</i>	<i>Down on last year</i>	<i>Don't know</i>
Wales	12%	51%	32%	5%
UK outside of Wales	16%	47%	31%	6%
Overseas	13%	49%	33%	5%
Repeat visitors	16%	59%	20%	5%

The following questions are about your business use of environmentally friendly measures...

Q7 Do you have an environmental policy in place?

<i>Yes</i>	28%
<i>No</i>	62%
<i>Don't know</i>	10%

Q8 Does your business hold any specific environmental accreditations or certificates, e.g. Green Dragon Award, Green Tourism Business Scheme, ISO14001?

<i>Yes</i>	8%
<i>No</i>	78%
<i>Don't Know</i>	14%

Q9 (IF YES) Please specify certification details (E.g. What do you have, which level, organisation etc) n/a

Q10 Which, if any, of the following environmentally friendly measures is your business actively practising?

<i>Recycling</i>	94%
<i>Energy or water conservation</i>	50%
<i>Actively encouraging customers to use alternative transport to the car</i>	19%
<i>Renewable energy sources</i>	16%
<i>We don't do anything</i>	3%
<i>Don't know</i>	1%
<i>Other</i>	2%

Q11 What are the main barriers to implementing environmentally friendly measures in your business? (UNPROMPTED)

<i>There are no barriers</i>	34%
<i>Cost</i>	31%
<i>It doesn't apply / impossible to implement (e.g. no public transport nearby)</i>	10%
<i>Finding the time</i>	9%
<i>Legislation / planning permission</i>	4%
<i>It would create more work for us to do</i>	4%
<i>Issues relating to waste</i>	3%
<i>Customers wouldn't do it / use it</i>	3%
<i>Lack of guidance on alternatives</i>	2%
<i>Lack of local suppliers</i>	2%
<i>Reduced efficiency (using alternative energy / transport)</i>	1%
<i>Don't know</i>	9%
<i>Other</i>	5%

Q12 The next two questions are about public transport in your local area. How would you rate your awareness of ... in your local area?

	<i>Very aware</i>	<i>Aware</i>	<i>Unaware</i>
What services are available (i.e. trains, buses etc)	33%	64%	3%
Local transport timetables	31%	60%	9%
Local transport routes	31%	61%	8%

Q13 In order to make your customers more aware of public transport methods available in your local area, do you actively do any of the following? (READ OUT)

<i>Make timetables available at your premises</i>	78%
<i>Promote local transport options in your promotional material</i>	35%
<i>Actively prompt guests to use public transport</i>	22%
<i>Promote local transport options on your website</i>	22%
<i>We do not actively make customers aware</i>	12%
<i>Don't know</i>	4%

Q14 RECORD ALL USEFUL COMMENTS ON ENVIRONMENT

n/a

Q15 Approximately what proportion of the goods and services your business purchases do you source locally? (ESTIMATION)

<i>Less than 10%</i>	3%
<i>10% - 25%</i>	5%
<i>26% - 50%</i>	9%
<i>51% - 75%</i>	16%
<i>76% - 100%</i>	61%
<i>Don't know</i>	6%

Q16	Will you be open for business this winter?	
	Yes.....	64%
	Some of the time.....	11%
	No.....	24%
	Don't know.....	1%
Q17	(IF OPEN) How confident are you for the winter season?	
	Very confident.....	9%
	Fairly confident.....	56%
	Not very confident.....	27%
	Not at all confident.....	6%
	Don't know.....	2%
Q18	What is your current Visit Wales star grading?	
	5 star.....	11%
	4 star.....	33%
	3 star.....	20%
	2 star.....	3%
	1 star.....	0%
	Don't know.....	16%
	Not currently graded by Visit Wales.....	17%
Q19	Which of the following best describes your location:	
	Seaside.....	38%
	Inland.....	57%
	Urban.....	5%