VisitEngland

Tourism Business Monitor 2014

Wave 3 – Post-Easter up until mid-July

Contents

Background, objectives and research method

Tourism Business Monitor designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

Amalgamation of two previous surveys discontinued at end of 2011:

- England Attractions Monitor
- Accommodation Business Confidence Monitor

Telephone survey conducted five times per year immediately following key tourism periods among:

- c. 500 accommodation establishments (c. 250 serviced / c. 250 non-serviced), including mix by region, establishment size and hotels / guest houses / B&B / self-catering / caravan and campsites.
- c. 300 visitor attractions including mix by region, attraction type, size (measured by annual visitor admissions) and free / paid admission.

Questions on ‘hot topics’ included on a periodic basis.

Fieldwork dates:

Apr 2014: 24 Apr-1 May 2014, reviewing the Easter period 2014
Jan 2014: 6-12 January 2014, reviewing the Christmas and New Year period 2013
Nov 2013: 4-10 Nov 2013, reviewing mid-September until the end of October
Sept 2013: 9-14 Sept 2013, reviewing the period from mid-July up until the end of the summer holidays
Jul 2013: 11-19 Jul 2013, reviewing period after the Easter holidays up until mid-July
Apr 2013: 15-21 Apr 2013, reviewing period from January until the end of the Easter holidays
Jan 2013: 7-13 Jan 2013, reviewing Christmas and New Year period 2012
Nov 2012: 5-12 Nov 2012, reviewing mid-September until the end of the October
Sept 2012: 10-17 Sept 2012, reviewing the school summer holidays

Key Findings

Overall, visitor attractions have had a better post-Easter period than accommodation businesses, and this has boosted year-to-date figures also. The changeable weather over this latest period has affected caravan/campsites and rural attractions the most, which is reflected in lower levels of business satisfaction for post-Easter up until mid-July. However, confidence levels are still strong amongst all business types for the forthcoming period.

Both accommodation businesses and visitor attractions have overall seen increases in domestic visitors and overseas visitors this year, and accommodation businesses continue to see more repeat visitors than last year.

Visitor attractions have seen a greater increase in visitors for the post-Easter period than accommodation businesses – 3% increase vs. no change for accommodation. This has boosted the YTD increase for visitor attractions also to 3%, whilst accommodation sites have seen a slightly smaller increase of 1%.

The number of caravan/campsites saying visitors are up on last year has almost halved since last wave. Correspondingly, satisfaction levels have dropped among them for this latest period. Although slightly lower than in April this year, the number of attractions saying visitors are up on last year is similar to this time last year. Satisfaction levels also mirror July 2013.

Advanced booking levels are largely good for the period until the end of the Summer holidays – on a par with the same period last year.

Optimism for 2014 to be more successful than 2013 remains on a similar level to Apr ’14, although accommodation businesses are feeling a little less optimistic than last wave. Both business types are currently more optimistic for business performance for the year as a whole than they were in July 2013.

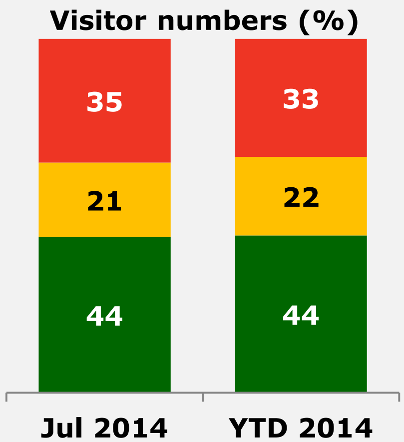
Almost all attractions have their own website, and most have a Facebook page and/or Twitter account. Accommodation businesses are generally slightly less likely to have an online presence across these different media channels than attractions. The vast majority of attractions update their Facebook and/or Twitter business accounts at least once per week, and most accommodation businesses also.

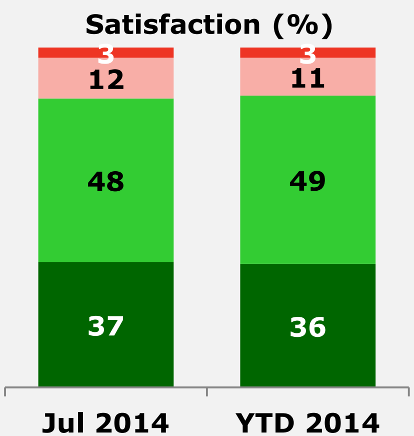
Visitor attractions receive online customer feedback more frequently than accommodation businesses – 31% receive this at least once a day, compared with just 15% on accommodation businesses

Business Dashboards

Business Performance Dashboard

Accommodation





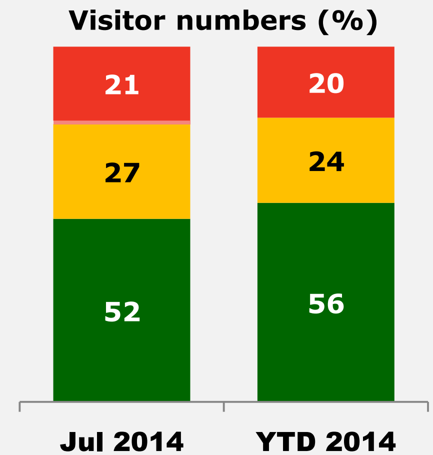
Versus same period previous year…

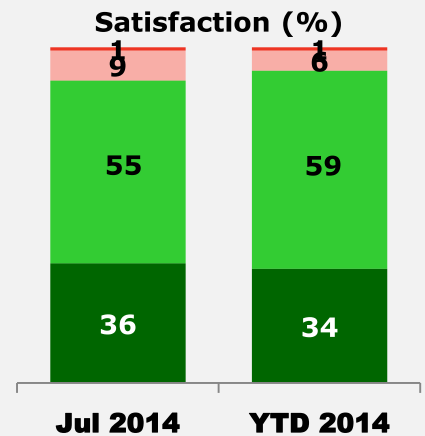
- Down
- Same
- Up

Satisfied with business performance…

- Not at all
- Not very
- Quite
- Very

Visitor Attractions





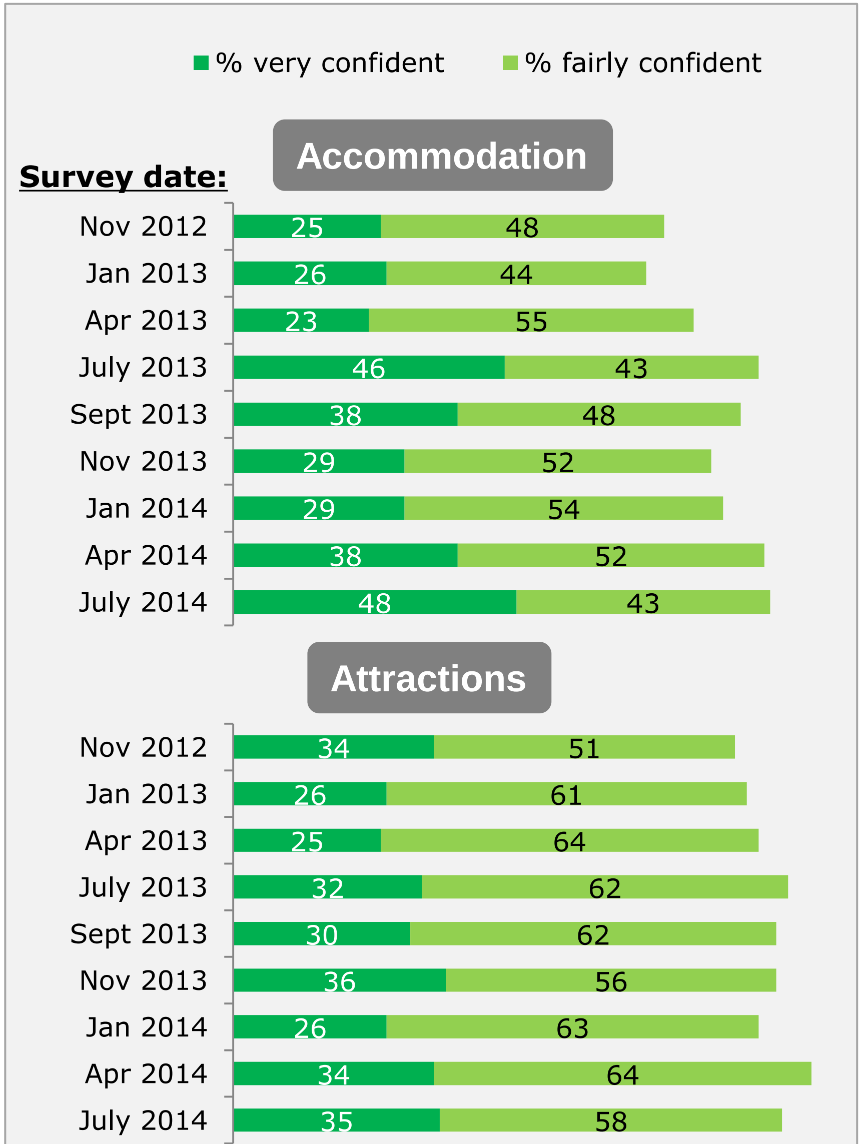
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July 2014

VisitEngland

Q3/4. Q7/8,

bdrc continental

Business Confidence Dashboard: confidence for next 1.5-2 months



Period asked about:

Survey conducted:	Period asked about
Nov 2012	Until the end of the year
Jan 2013	Until the end of Easter
Apr 2013	Until end of Spring / early Summer
July 2013	Until the end of the Summer holidays
Sept 2013	Until end of October
Nov 2013	Until the end of the year
Jan 2014	Until the end of Easter
Apr 2014	Until end of Spring / early Summer
July 2014	Until end of school summer holidays

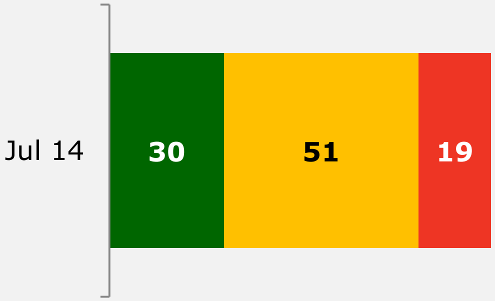
Visitor Profile

Changing Visitor Profile (year-to-date vs. previous year): **Accommodation**

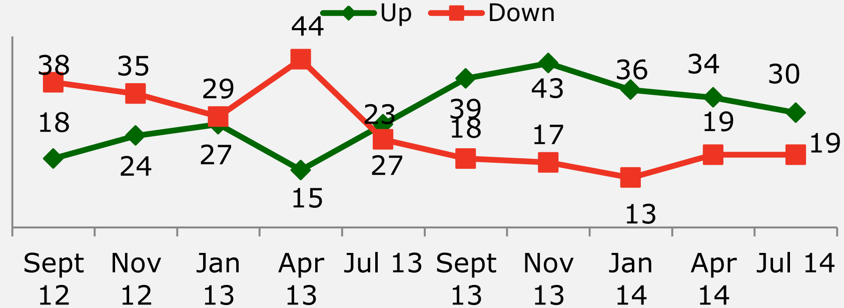
Up Same Down

NET: Up - Down

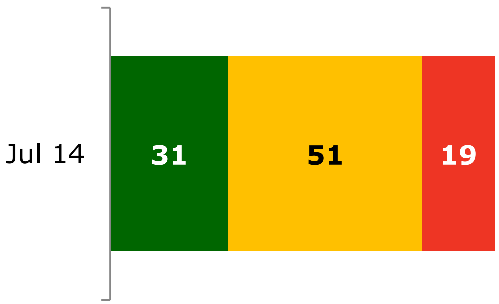
Domestic visitors



+11



Overseas visitors



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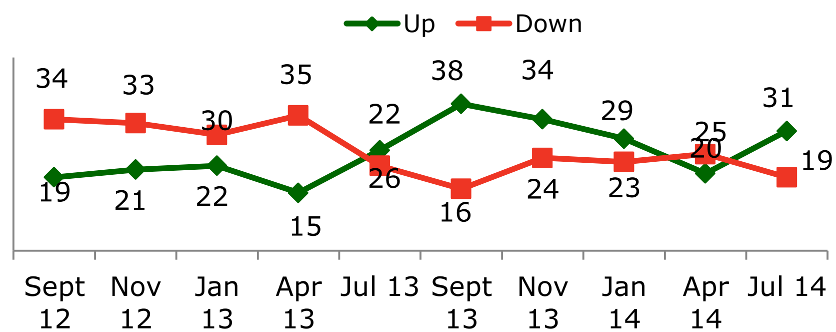
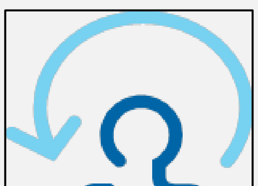
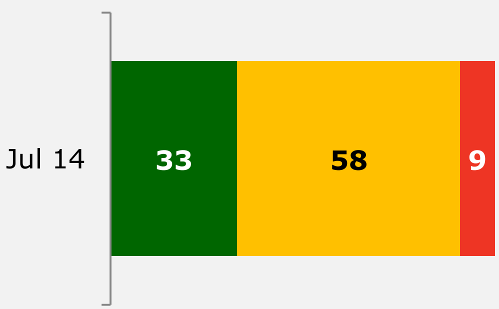




Repeat visitors



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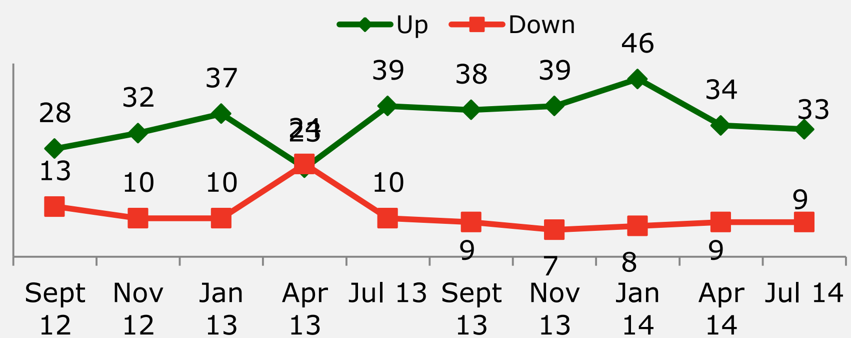


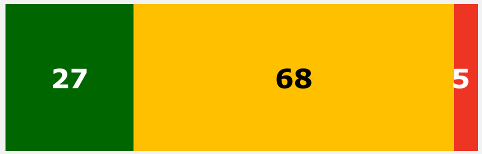
Changing Visitor Profile (year-to-date vs. previous year): **Attractions**

Up | Same | Down

NET: Up - Down

Visitors from immediate locality

Jul 14



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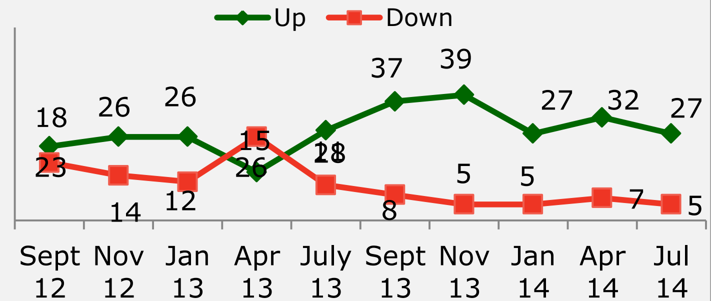
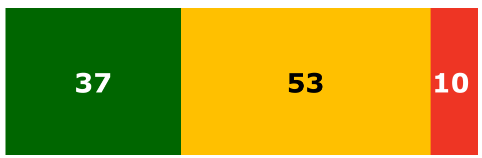


Other domestic visitors

Jul 14



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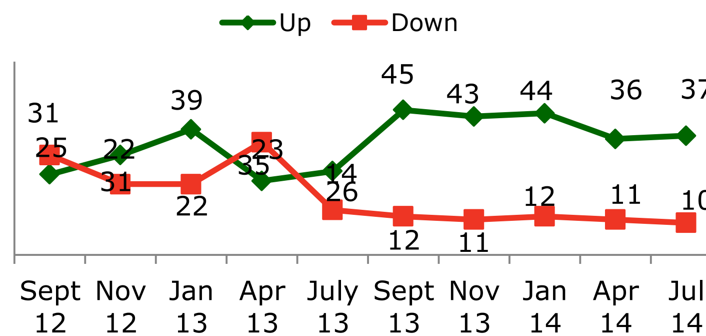
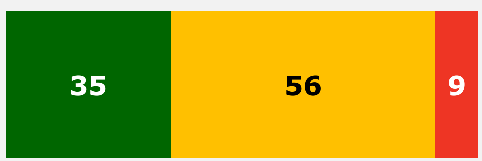


Overseas visitors

Jul 14



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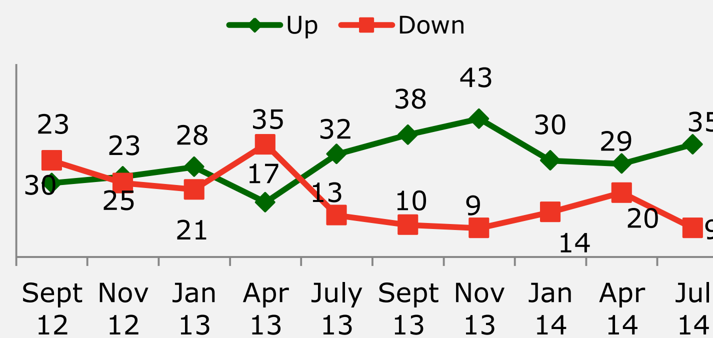
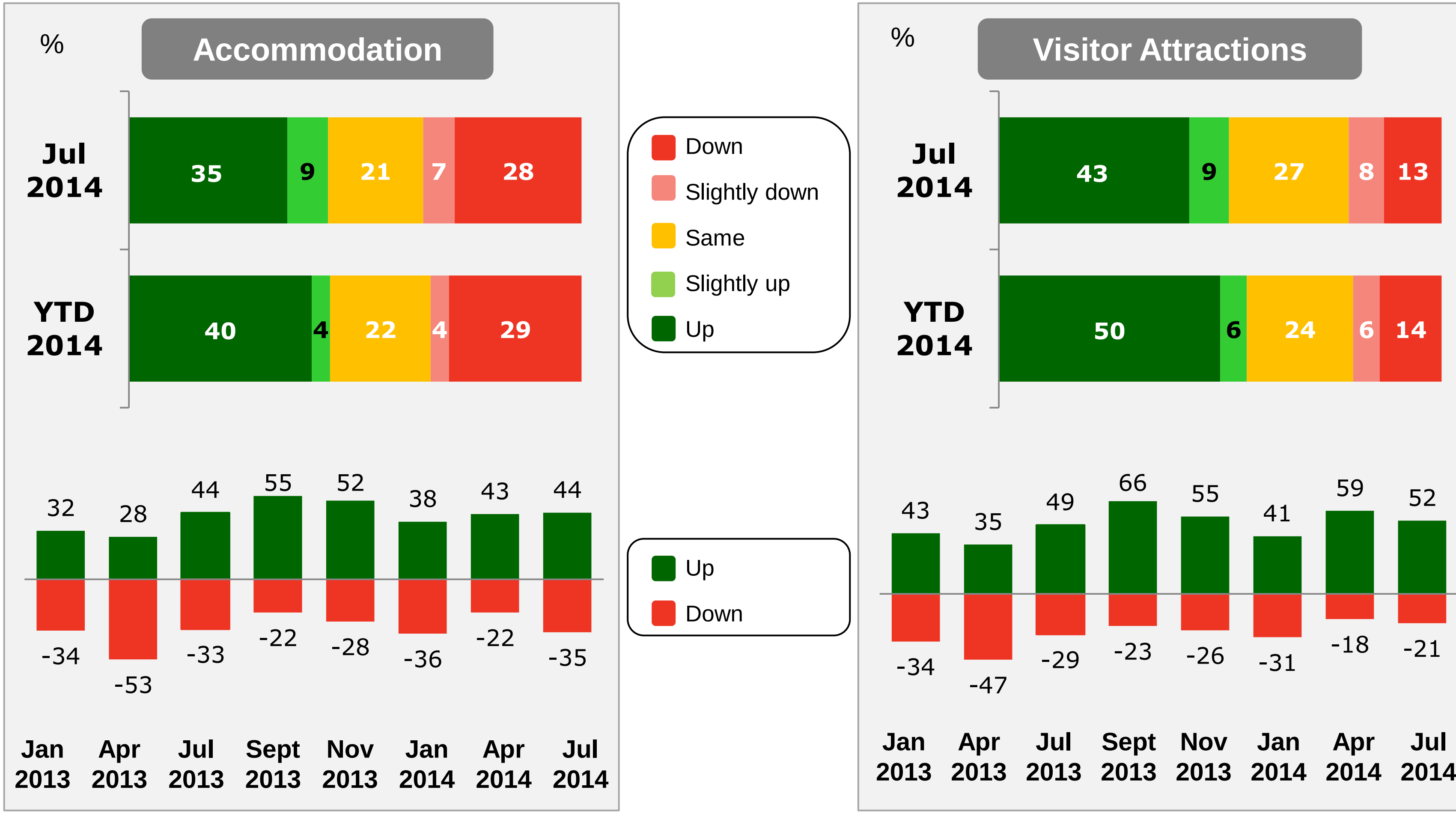


Business Performance

Visitor Numbers: Year-on-year changes (up /down)

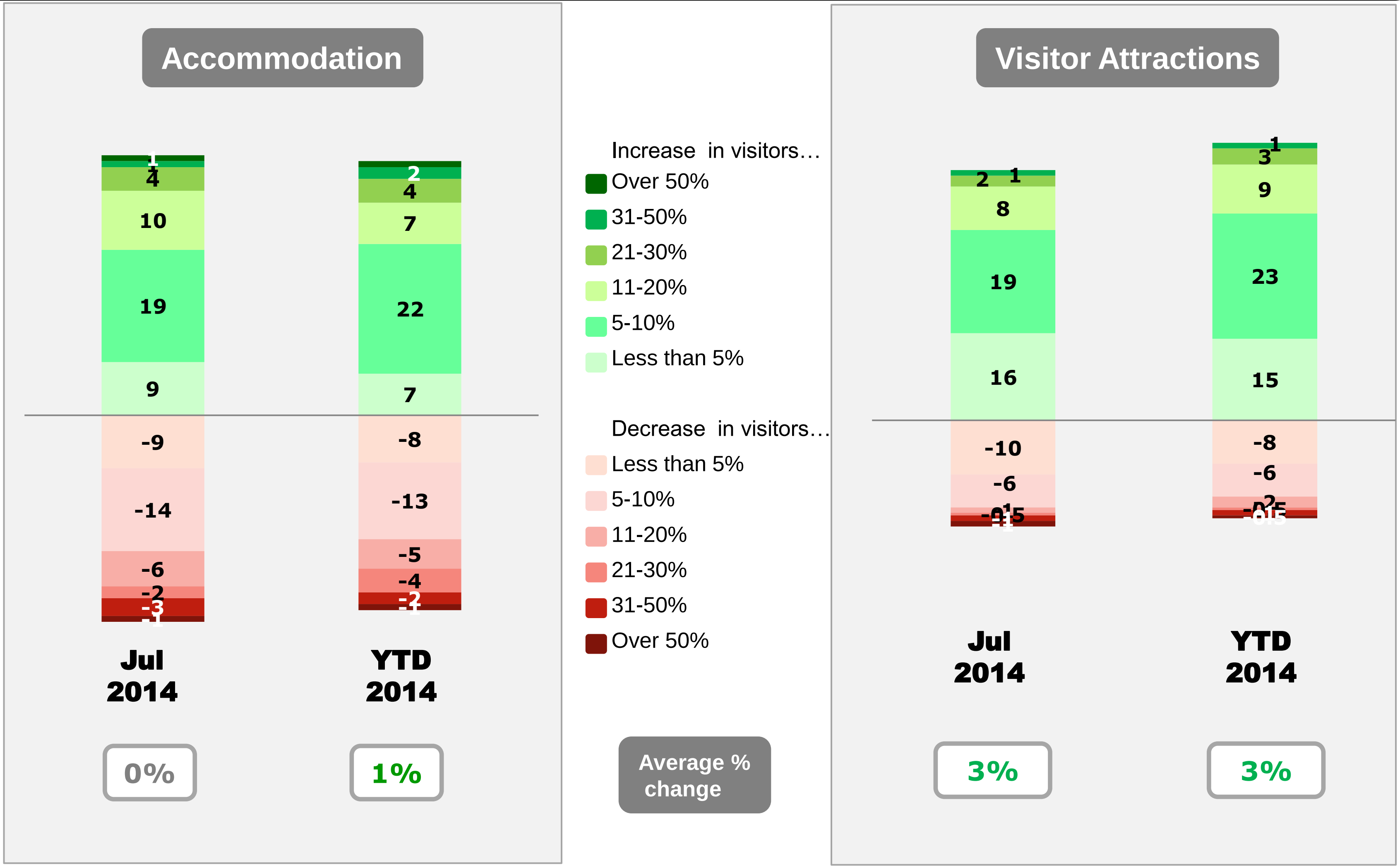
Visitor numbers are up for the latest period among both business types, although this is more marked amongst visitor attractions. Visitor attractions are also faring better for the YTD so far in terms of visitor numbers.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July / **Apr 2014:** Easter period 2014 **/ Jan 2014:** Christmas and New Year period 2013/ **Nov 2013:** Mid-September until the end of October/ **Sept 2013:** Mid-July until end of the Summer holidays

Visitor Numbers: Year-on-year changes (%)

Again, visitor attractions have seen a greater increase in visitors for the post-Easter period than accommodation businesses – 3% increase vs. no change for accommodation. This has boosted the YTD increase for visitor attractions also to 3%, whilst accommodation sites have seen a slightly smaller increase of 1%.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2014: After Easter holidays until mid-July

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bdrc continental

Q9, Q5

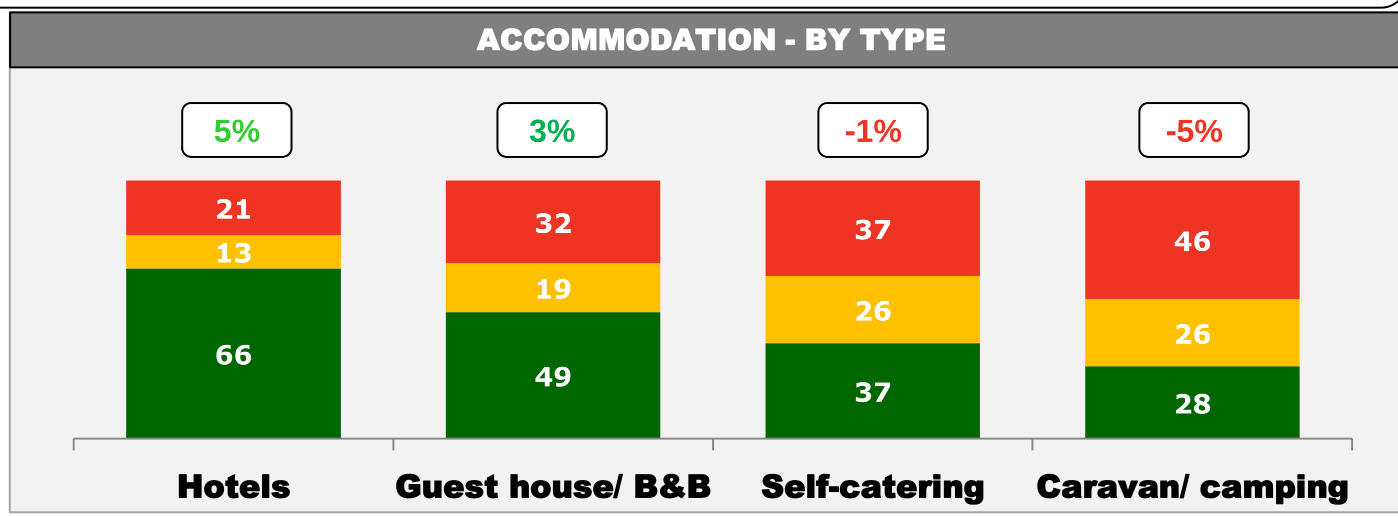
Changing business performance: By business type

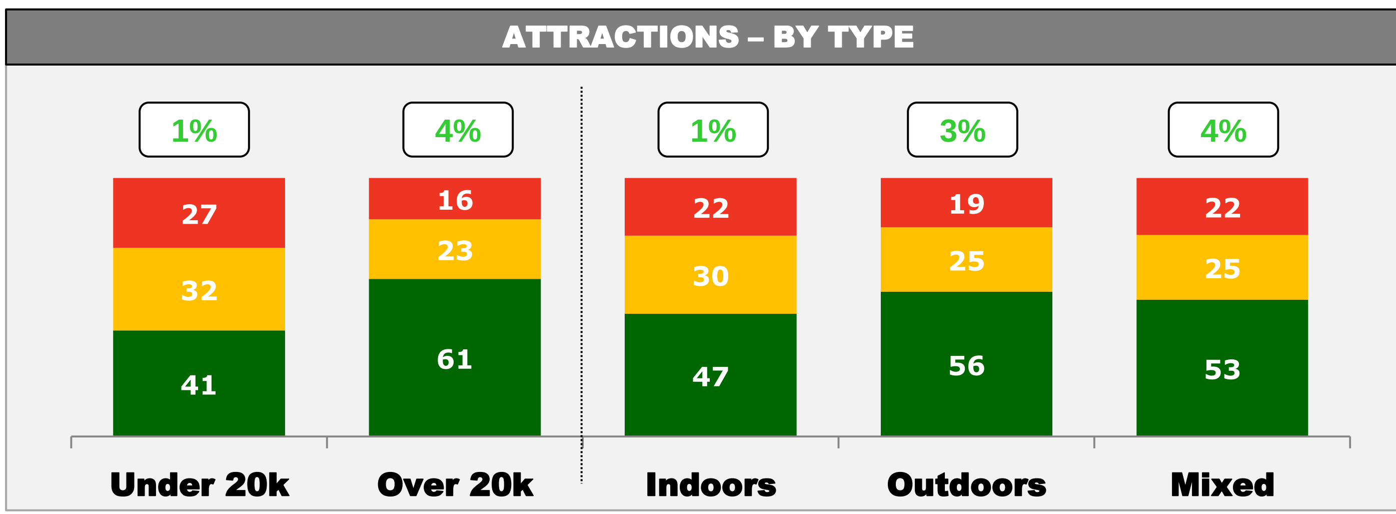
Hotels and larger attractions have both seen the greatest increase in visitor numbers for the post-Easter period vs. last year. The changeable weather may have negatively impacted caravan/camping sites, who have reported a 5% decrease in visitors this period.

Versus same period previous year…

% of businesses:
- Down
- Same
- Up

% change in visitor numbers:



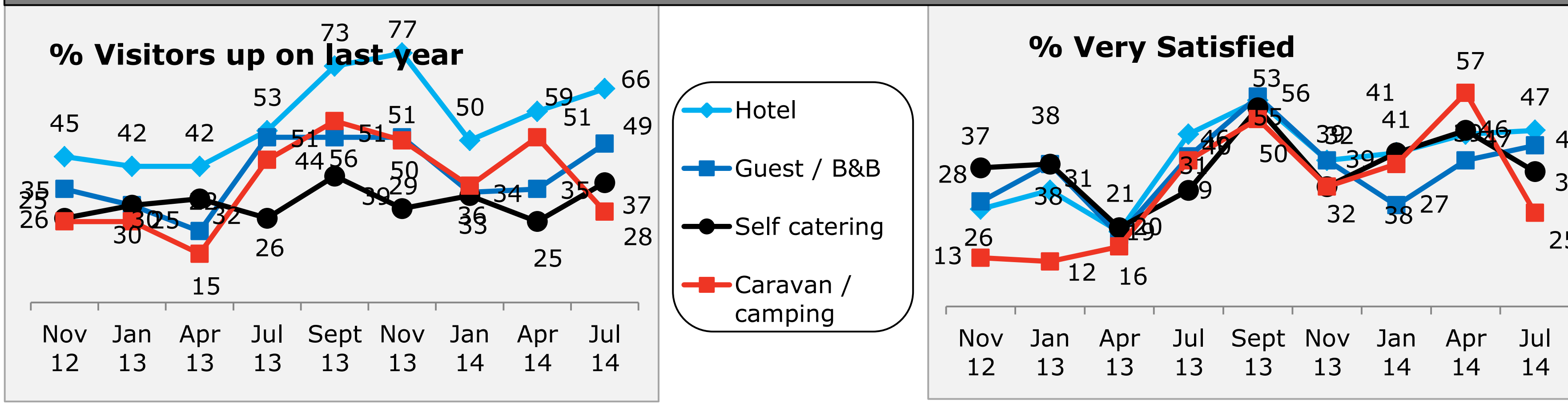


Q3/4, Q5

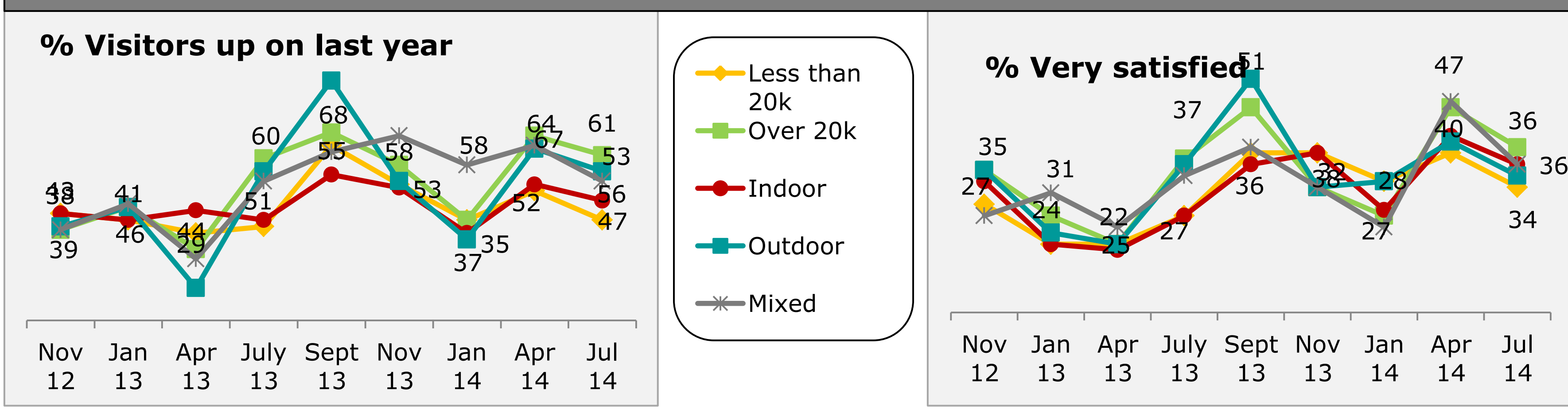
Changing business performance: By business type

The number of caravan/campsites saying visitors are up on last year has almost halved since last wave. Correspondingly satisfaction levels have dropped among them. Although slightly lower than in April this year, the number of attractions saying visitors are up on last year is almost the same as this time last year. Satisfaction levels also mirror July 2013.

ACCOMMODATION - BY TYPE



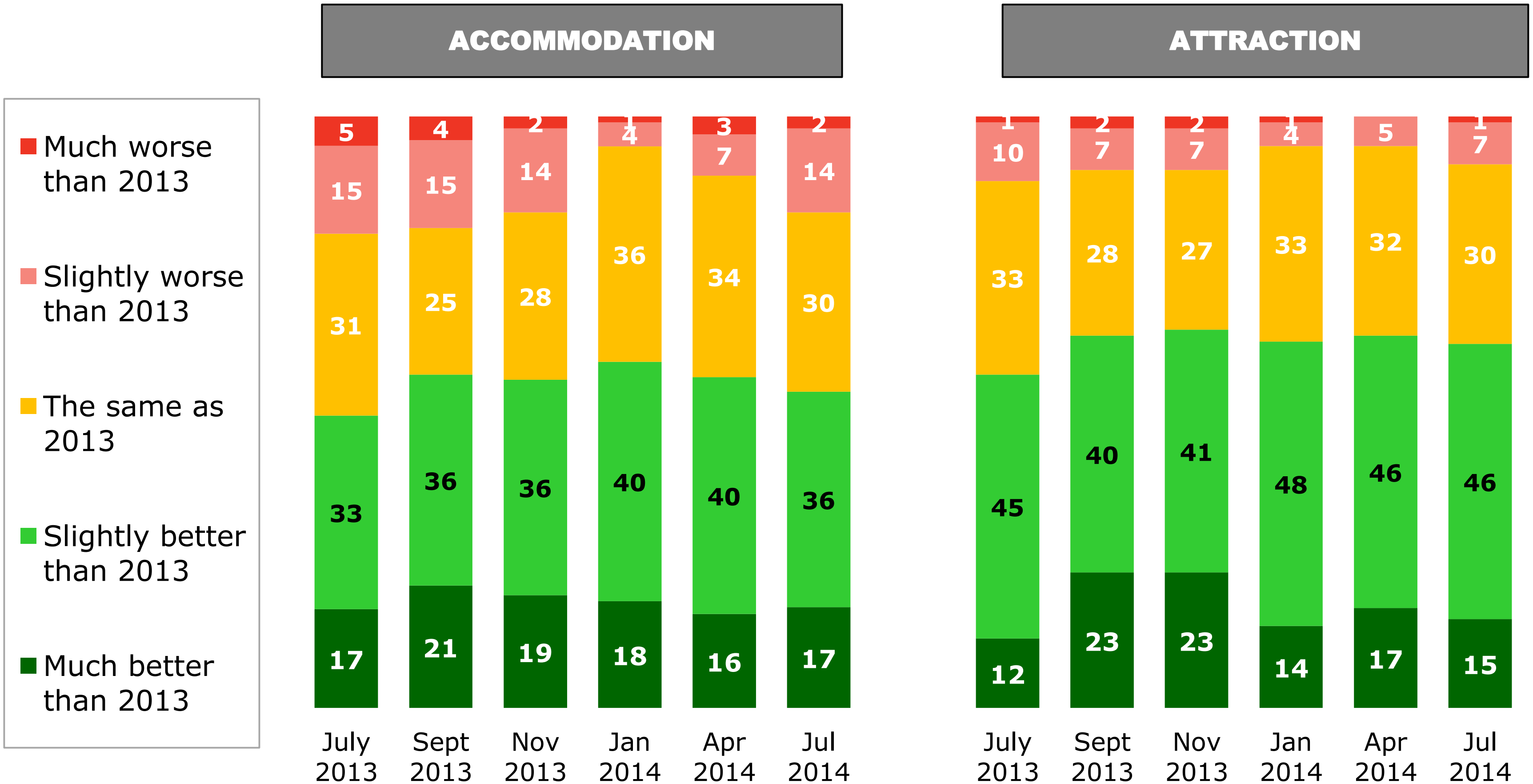
ATTRACTIONS – BY TYPE



Business Confidence

Business optimism for 2014

Optimism for 2014 to be more successful than 2013 remains on a similar level to Apr '14, although accommodation businesses are feeling a little less optimistic than last wave.



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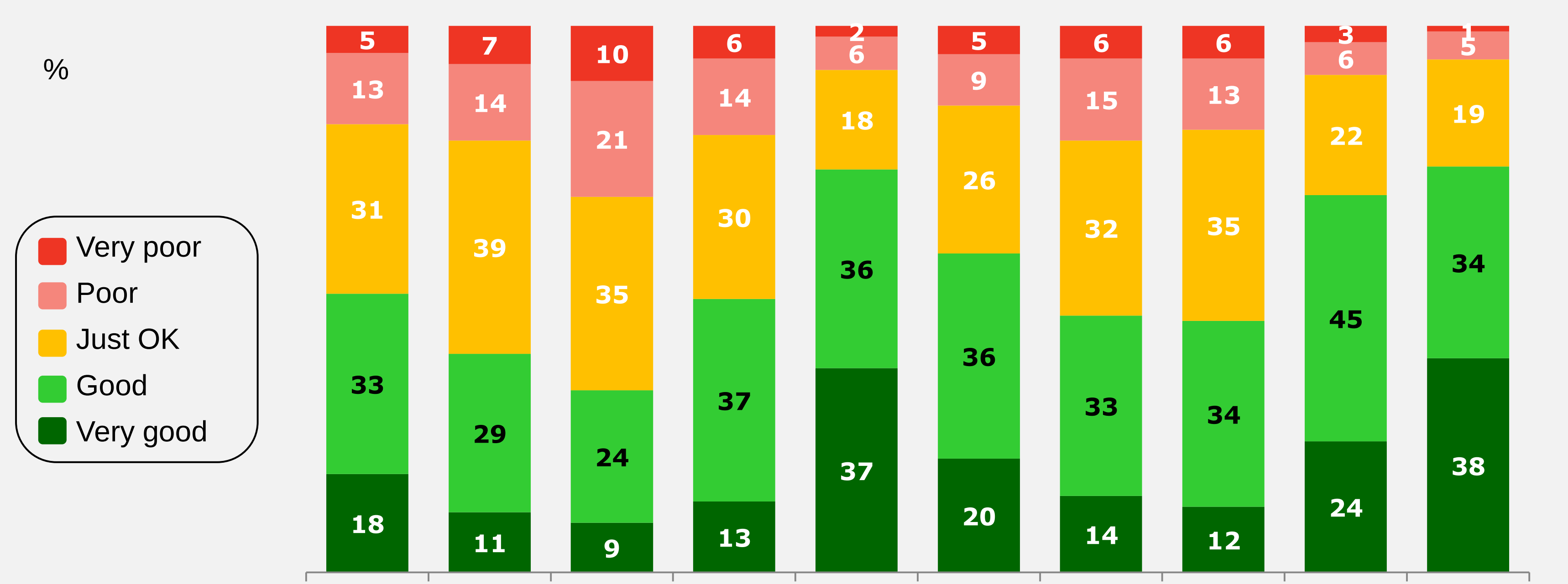
Q15

Advance booking levels: Accommodation

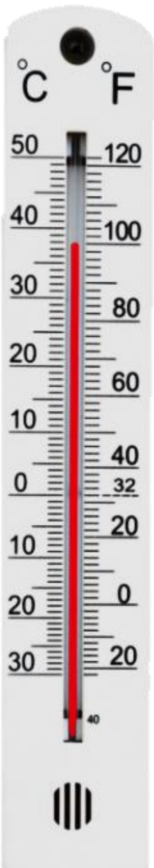
Advanced booking levels are largely good for the period until the end of the Summer holidays – on a par with the same period last year.

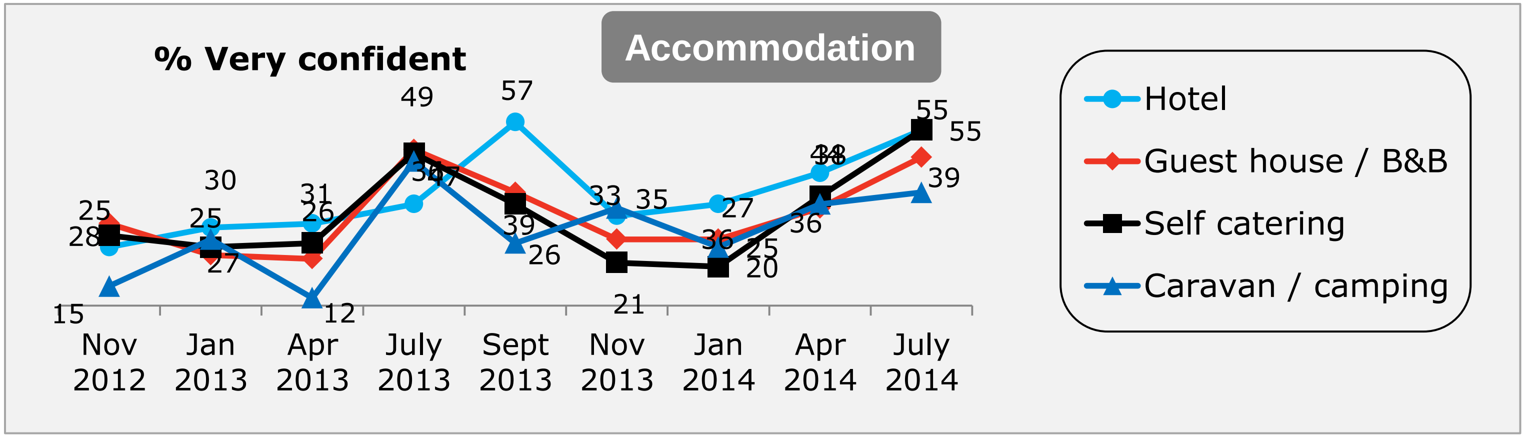


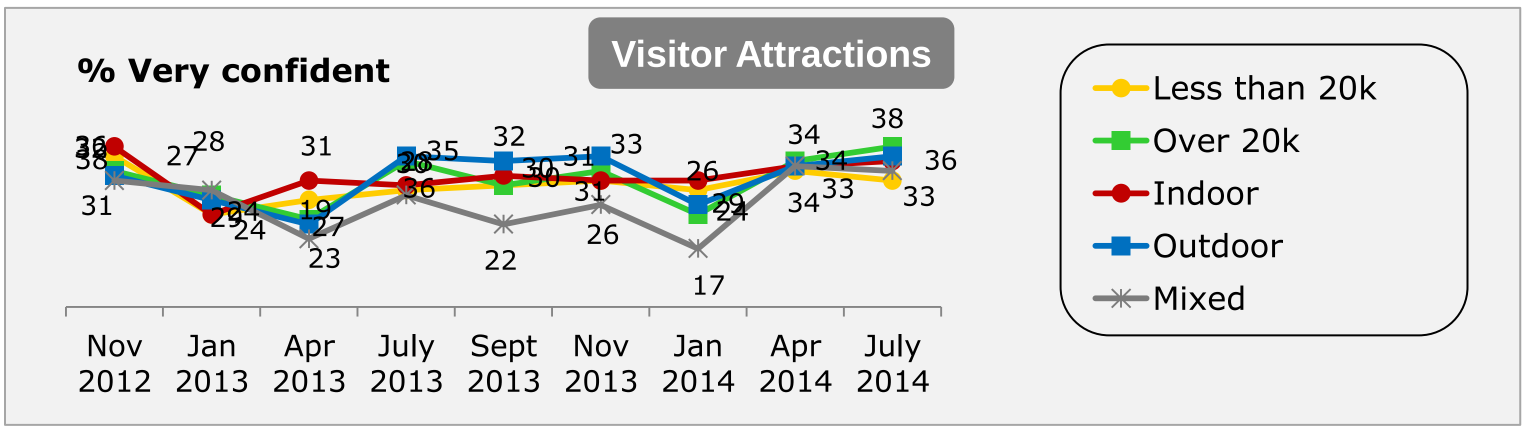
Survey conducted:	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	Jul 2014
Period asked about:	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of summ er hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of summer hols

Confidence in performance for forthcoming period: **By business type**

Confidence levels are largely up across accommodation businesses, and levels have plateaued amongst visitor attractions. Caravan/campsites are feeling the least confident for the forthcoming period.







Survey conducted:	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	July 2014
Period asked about:	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of the Summer holidays	Until end of Oct	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of school summer holidays

Positive verbatim comments on business confidence

We are putting a lot of investment into marketing, so hopefully that will take effect. (Attractions)

We have done well so far and we haven't had our most important half of the year yet. September and October are our good months (Attractions)

Very confident. We have a good summer season. We've got a good events list for the summer holidays. (Attractions)

Very good. Because we've got good booking, staff levels and 16 new rooms in the hotel. (Accommodation)

I feel it's going to increase. We're looking to upgrade the hotel. I'm refurbishing all the rooms to a 3 star lux level. (Accommodation)

Excellent, nearly full till September. Weather, economy and price of holidays abroad are all factors. (Accommodation)

Q19

Negative verbatim comments on business confidence

Fewer members are visiting than last year and overall numbers are down so I'm not feeling particularly confident for the upcoming few months. (Attractions)

Half of the year has already gone and the numbers are down and I don't see it picking up much in the near future. (Attractions)

Until the end of August I expect numbers to be down. The July numbers are disappointing; this could be the weather. Our numbers are very up and down this year. (Attractions)

I think people think it is too expensive to pay to stay in cottages in Devon: agencies are trying to put the prices up and add on commission and it's putting people off coming here (Accommodation)

I think everybody is very price conscious at the minute: my prices aren't high but people are unwilling to spend. I also don't think I'm marketing the business to it's fullest extent. (Accommodation)

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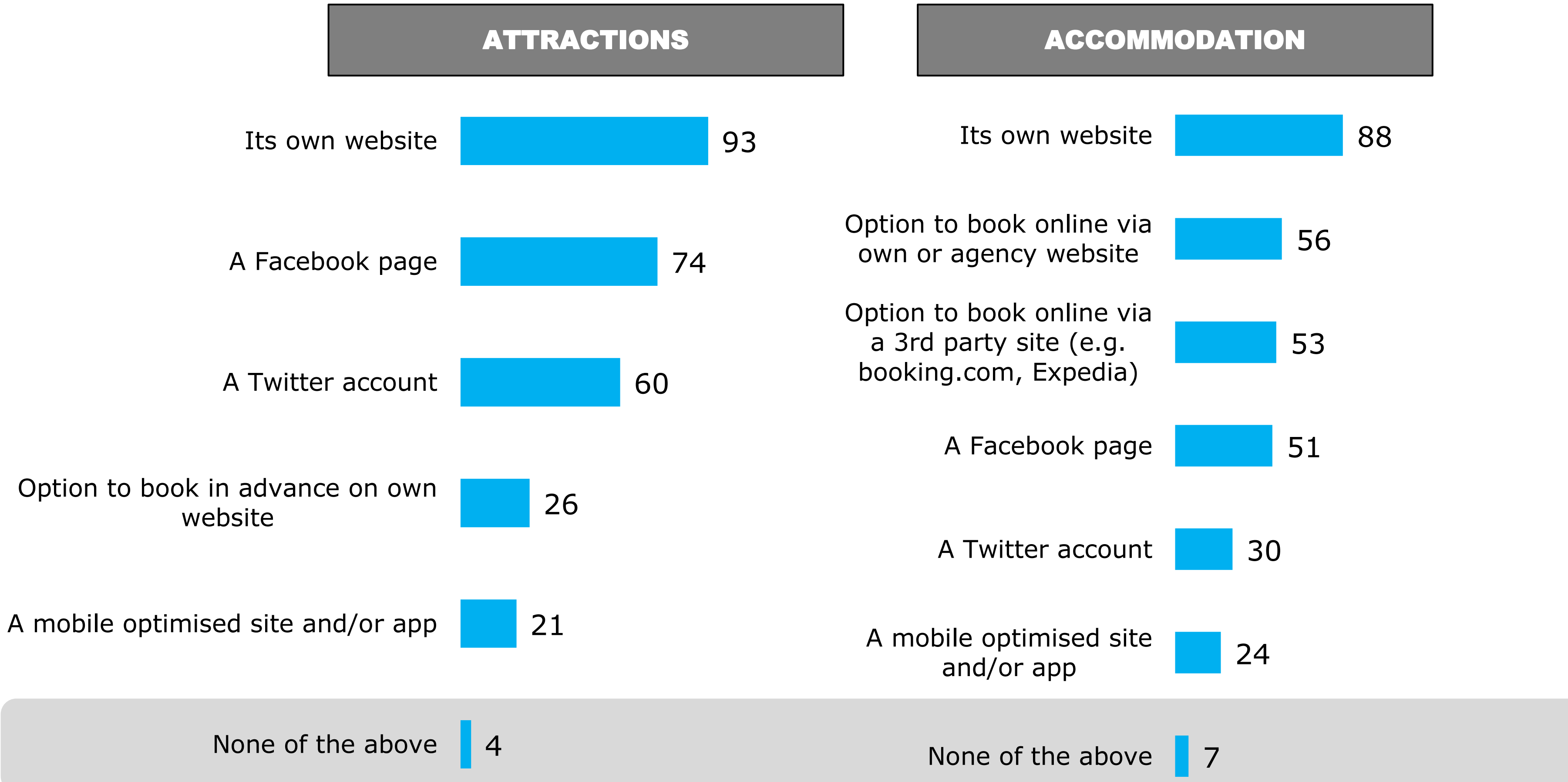
Online communication / access

Online communications / access

Almost all attractions have their own website, and most have a Facebook page and/or Twitter account. Accommodation businesses are generally slightly less likely to have an online presence across these different media channels than attractions.



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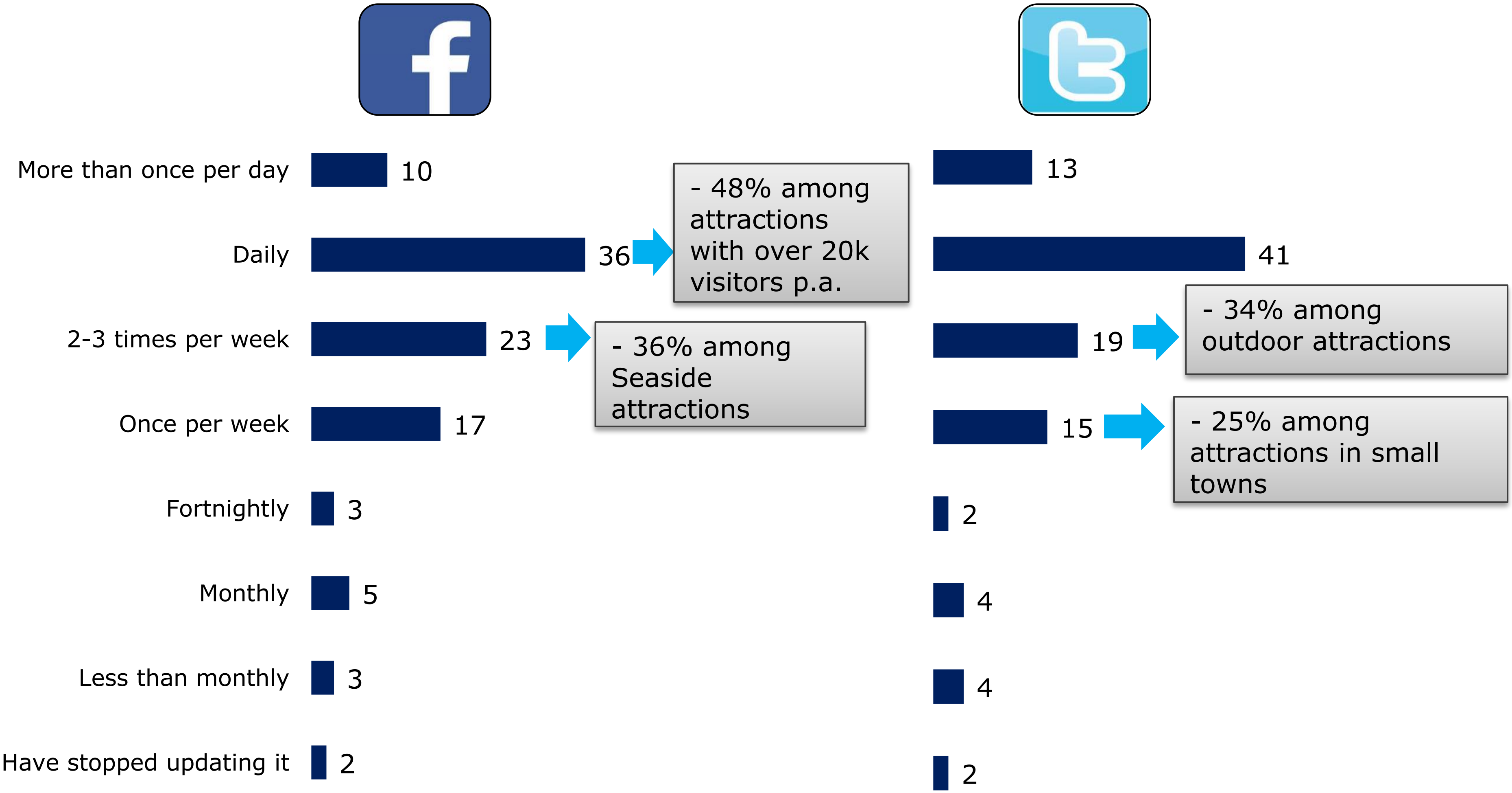
Q16a

Frequency of updating Facebook / Twitter business accounts - Attractions

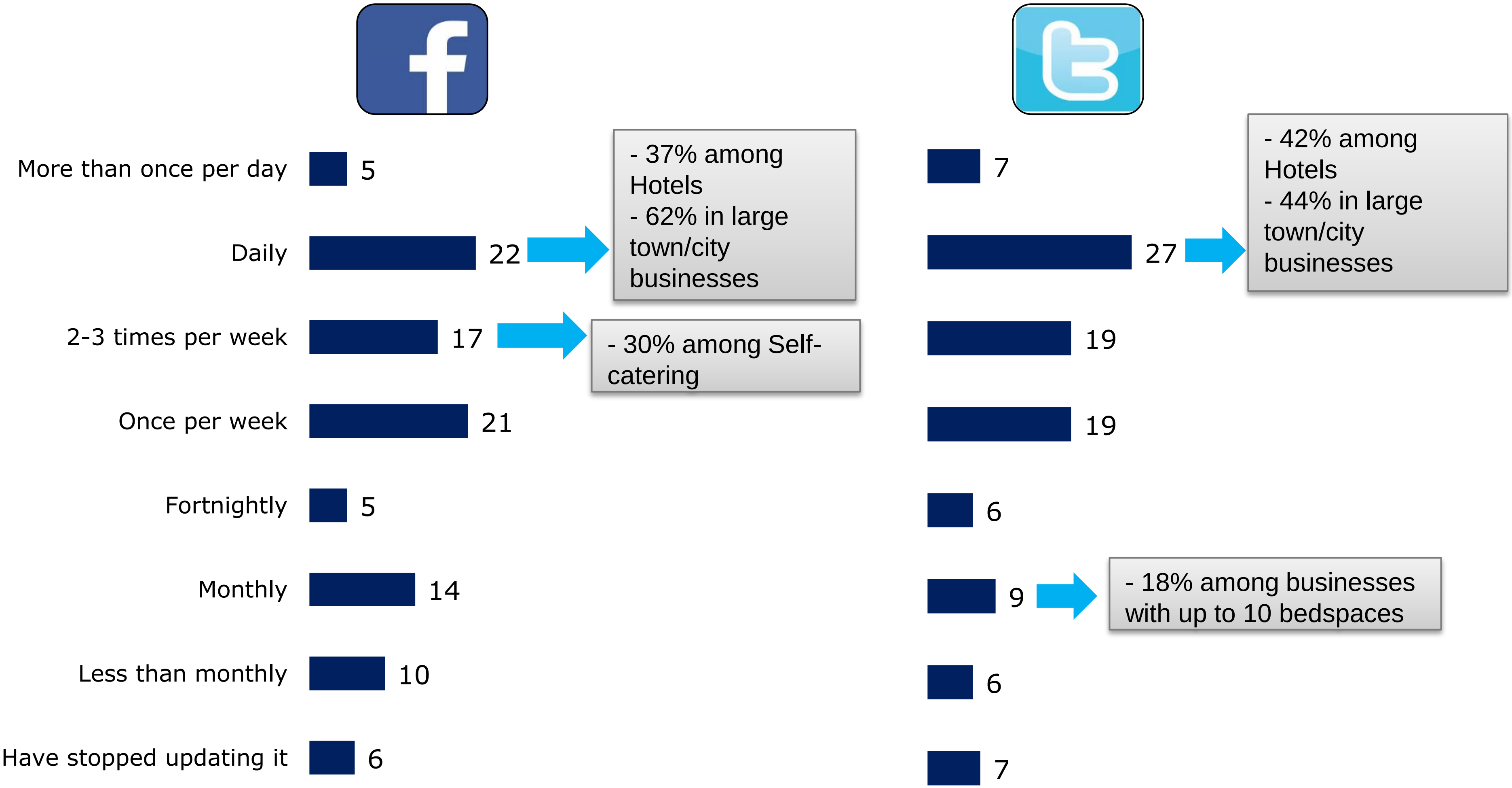
The vast majority of attractions update their Facebook and/or Twitter business accounts at least once per week. Larger attractions update their Facebook accounts more frequently, with almost half (48%) doing this daily. Over a third of outdoor attractions update their Twitter account 2-3 times a week.



Q16a

Frequency of updating Facebook / Twitter business accounts - Accommodation

Businesses update Facebook (27%) or Twitter (34%) business accounts daily, although 2 in 3 update weekly. Hotels, and businesses in large towns/cities are much more likely to update their accounts daily.



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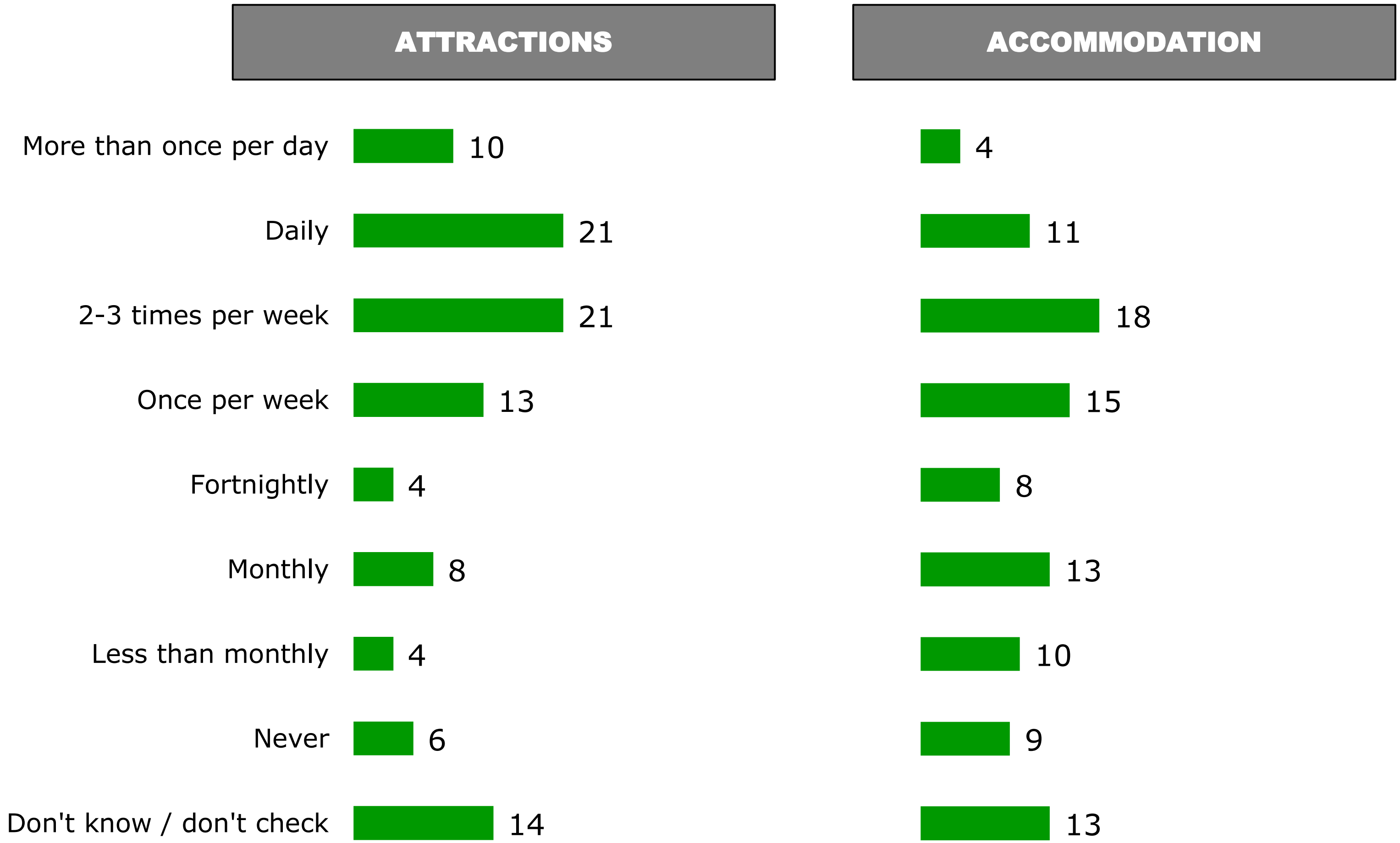
Q16a

Frequency of online customer feedback

Visitor attractions receive online customer feedback more frequently than accommodation businesses – 31% receive this at least once a day, compared with just 15% on accommodation businesses. This may be in part due to attractions' greater online presence across several media channels.



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Q16a


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