

# Tourism Business Monitor 2014

Wave 4 – Mid-July up until the end of the Summer holidays



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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:

**Sept 2014:** 8-14 Sept 2014, reviewing the period from mid-July up until the end of the summer holidays

**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

**Both business types have had successful summer periods, with attractions seeing a 5% increase in visitor numbers and accommodation businesses a 4% increase. These have in turn boosted the year-to-date figures. Accordingly, confidence for the forthcoming period up until the end of October is high, and the majority of businesses expect this to be a more successful year overall than 2013.**

Almost two thirds (64%) of attractions and over half (55%) of accommodation businesses have had a better summer than last year, and the market performance across the year to date is similarly buoyant versus the same period for 2013 (62% of attractions and 60% of accommodation businesses reported an increase in visitors).

Visitor attractions have seen growth from all visitor types, particularly within the domestic market. Accommodation businesses have done particularly well in growing repeat visitors over the year to date than over the same period last year.

Increases in visitor numbers for the summer period are most marked amongst hotels and larger attractions (with 20,000 or more visitors). Over  $\frac{3}{4}$  of hotels surveyed reported an increase in visitors for this latest summer period, resulting in a 7% overall increase in visitor numbers this summer compared with last. Large attractions also reported a 7% growth in visitor numbers.

Advance booking levels for accommodation are as buoyant as they were in April this year which, discounting pre-summer periods, is better than at any other point recorded. This has helped to boost business optimism for the forthcoming period and full calendar year amongst accommodation businesses, and attractions are similarly bullish.

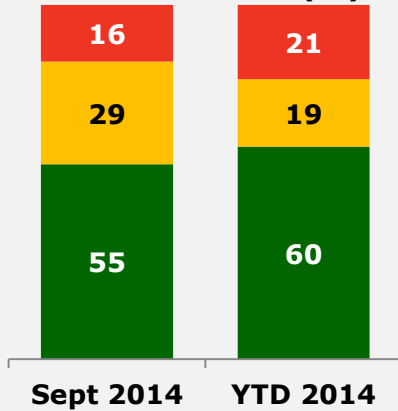
# Business Dashboards



# Business Performance Dashboard

## Accommodation

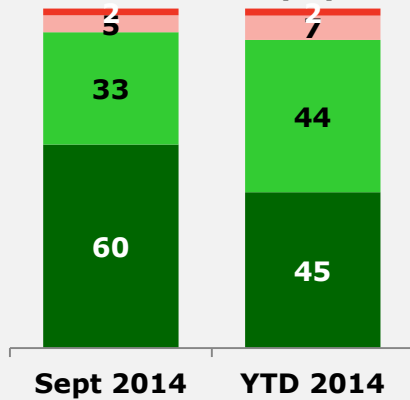
### Visitor numbers (%)



Versus same period previous year...

- Down
- Same
- Up

### Satisfaction (%)

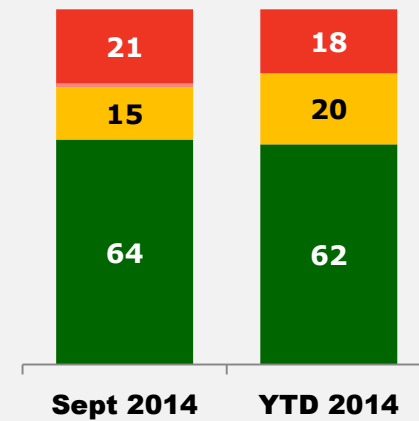


Satisfied with business performance...

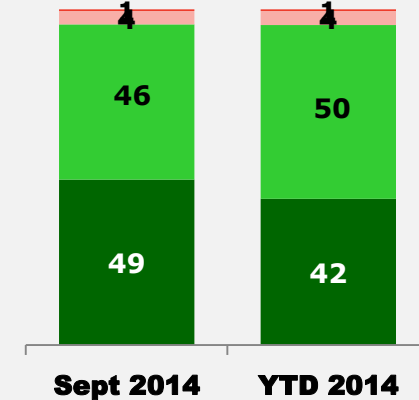
- Not at all
- Not very
- Quite
- Very

## Visitor Attractions

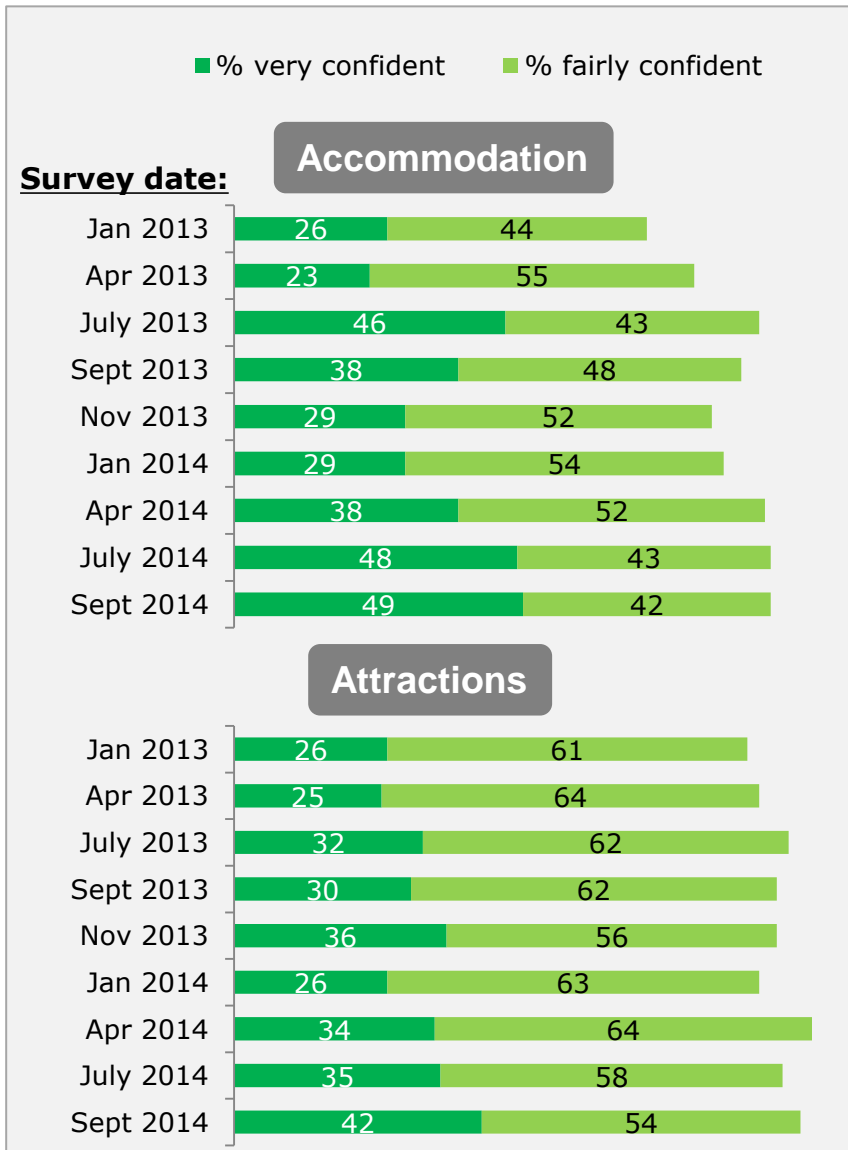
### Visitor numbers (%)



### Satisfaction (%)



# Business Confidence Dashboard: confidence for next 1.5-2 months



## Period asked about:

Survey conducted:	Period asked about
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
Sept 2014	Until end of October

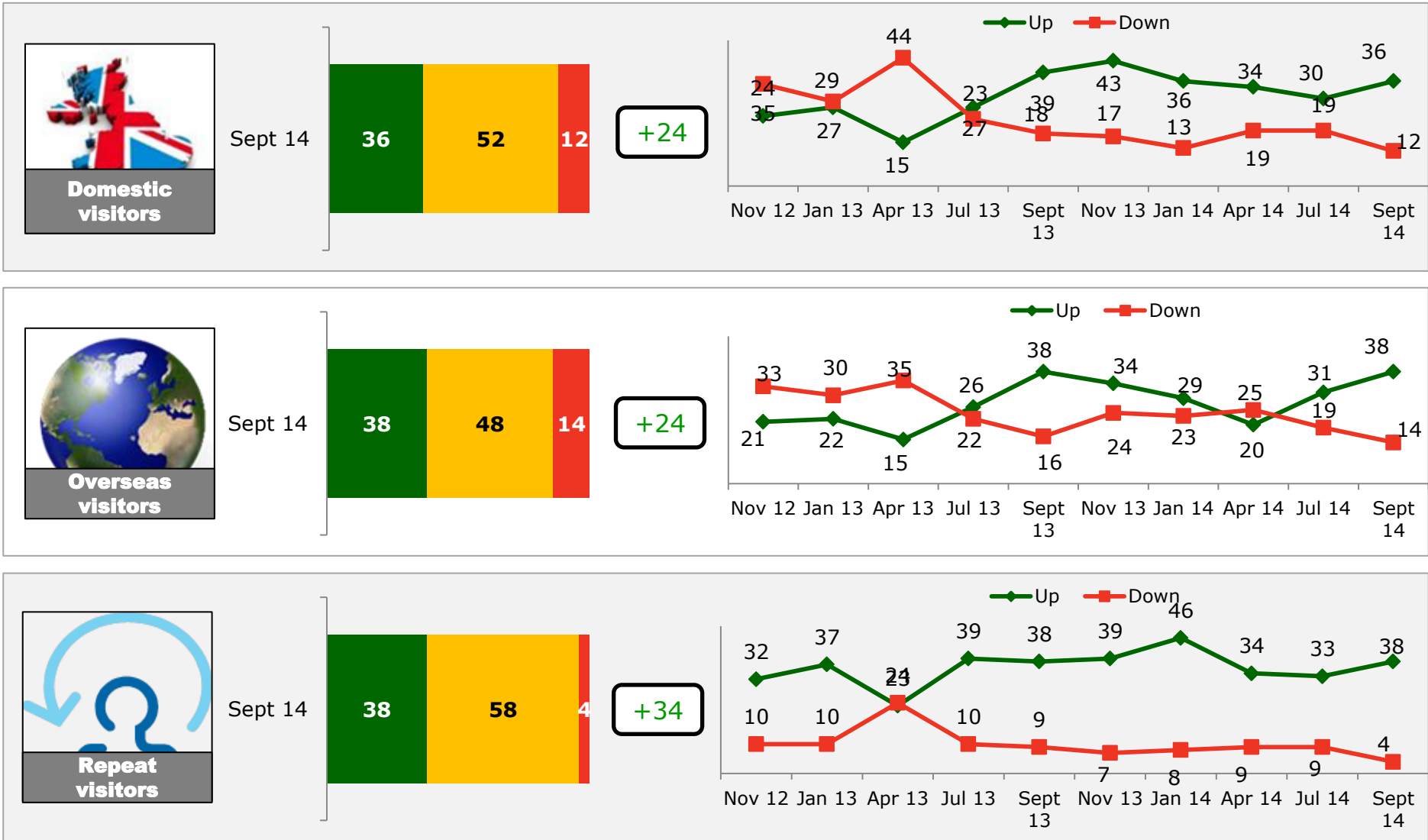
# Visitor Profile





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

■ Up    ■ Same    ■ Down    **NET:**  
**Up - Down**



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



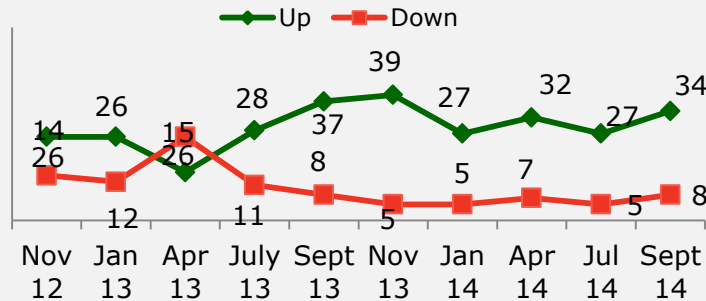
**NET:**  
Up - Down



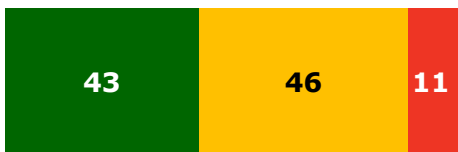
Sept 14



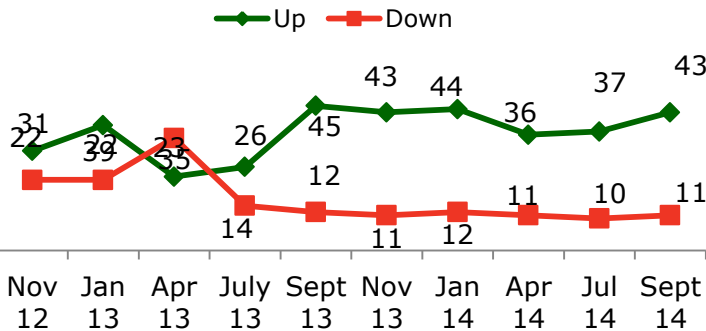
+26



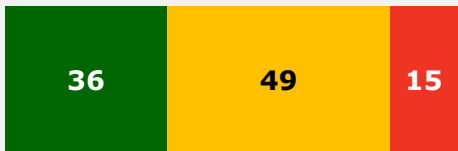
Sept 14



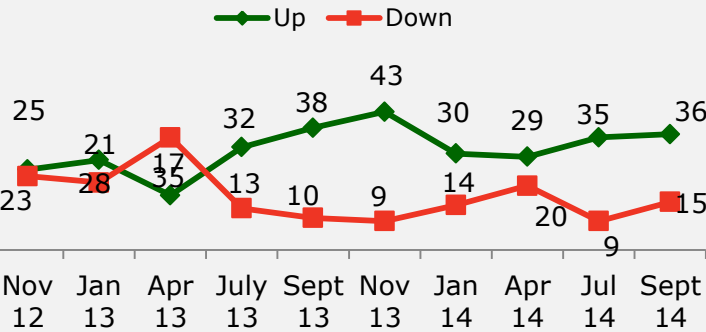
+32



Sept 14



+21

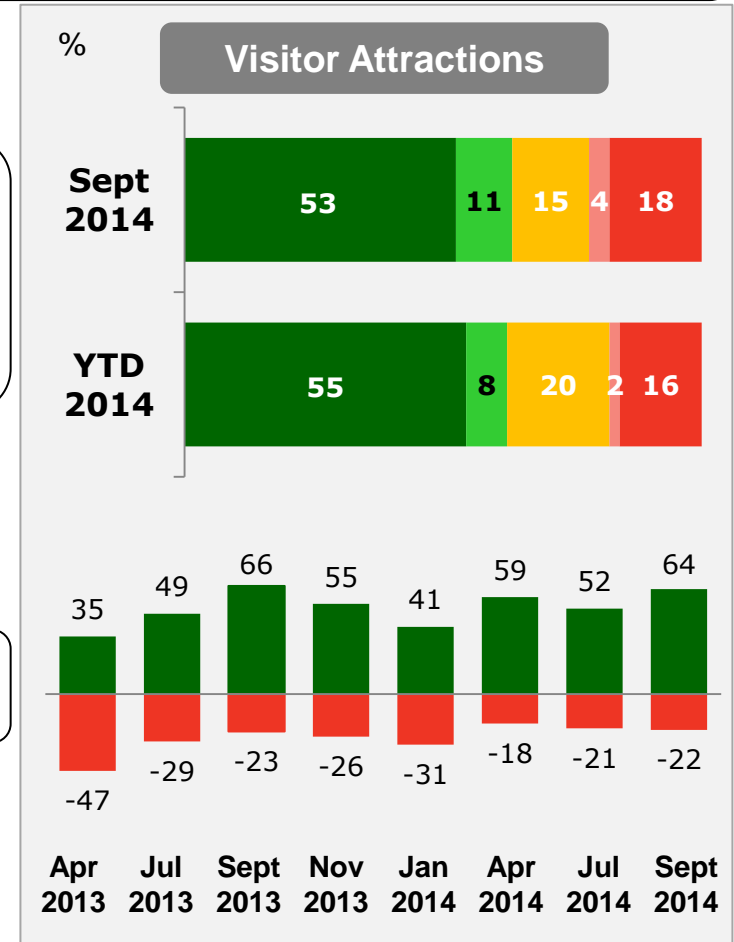
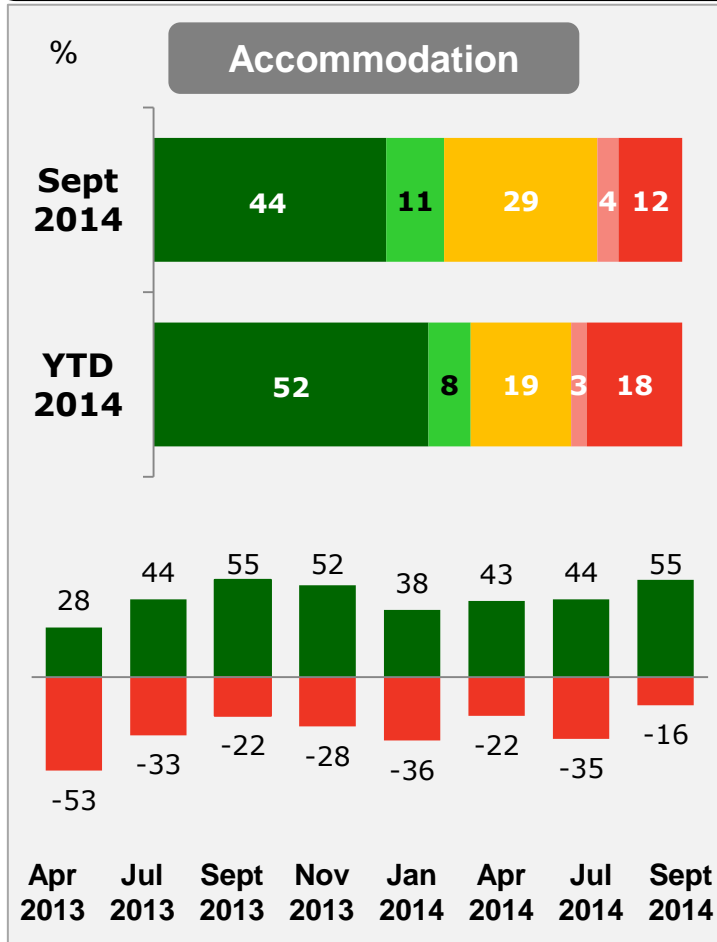


# Business Performance



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

Both business types have seen overall increases in visitors over the summer period, although slightly more attractions reported increases. Y-T-D figures however are more similar across business types, with 60% of accommodation businesses and 62% of attractions reporting increases in visitor numbers.

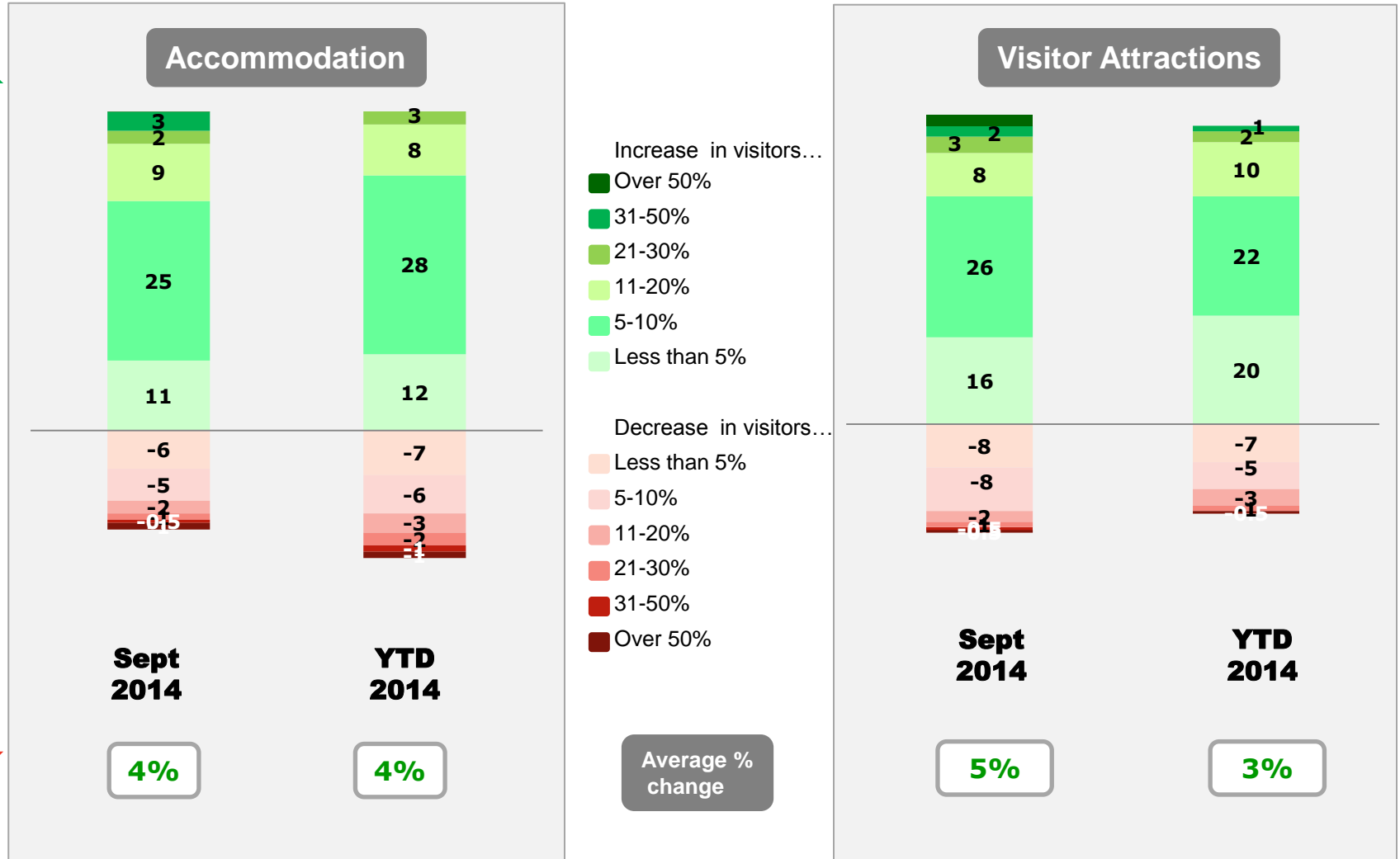


#### PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

Sept 2014: Mid-July until end of Summer holidays/ 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/

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

Both business types have had successful summer periods, with attractions seeing a 5% increase in visitors and accommodation businesses a 4% increase. These have in turn boosted the year-to-date figures.



# Changing business performance: By business type

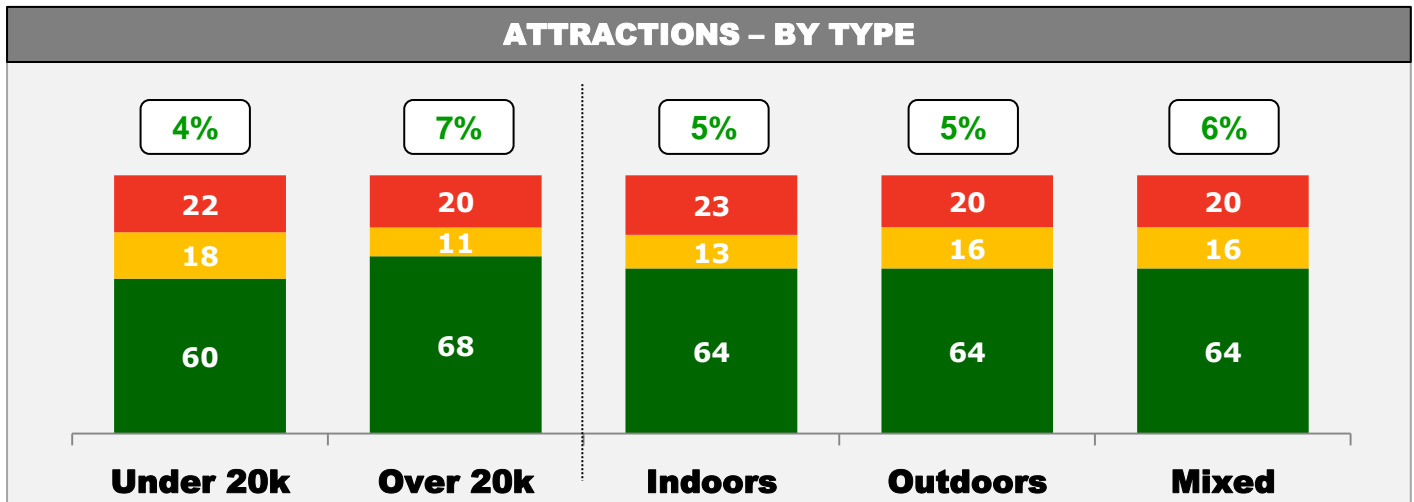
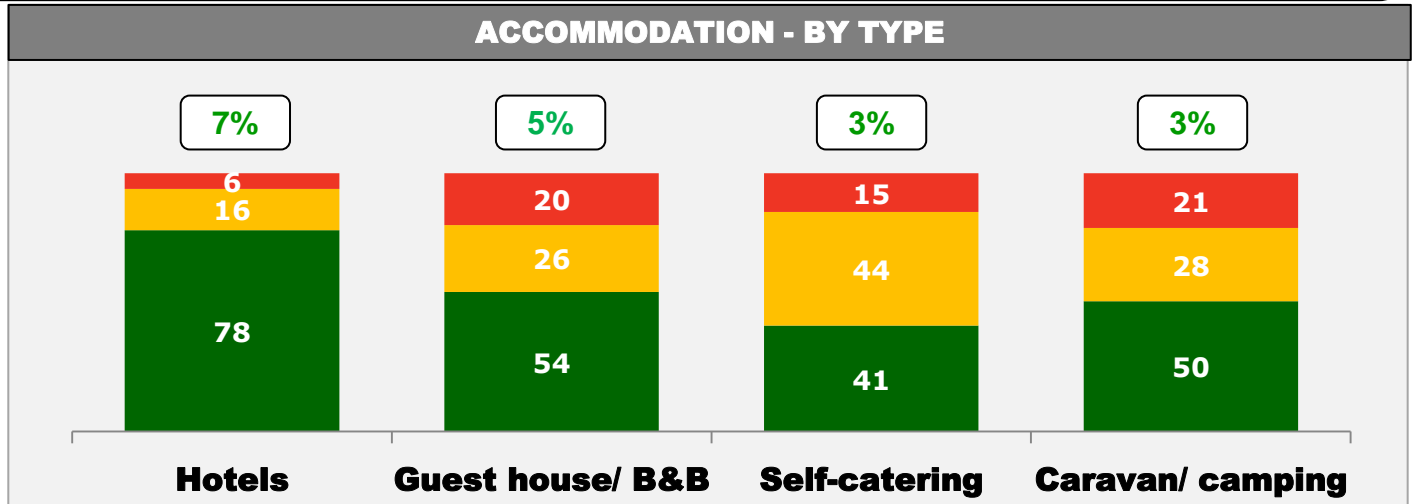
Over ¾ of hotels saw an increase in visitors for this latest summer period, which resulted in a 7% increase in visitor numbers. All attraction types fared well, but larger and mixed indoor/outdoors businesses saw slightly higher increases in visitor figures for this period.

Versus same period previous year...

% of businesses:

- Down
- Same
- Up

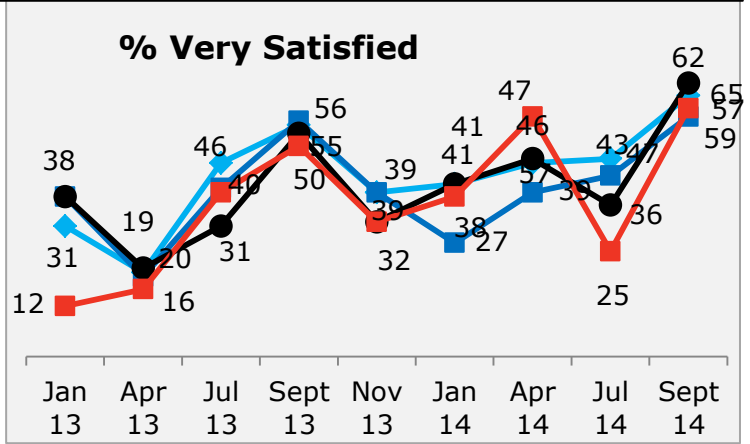
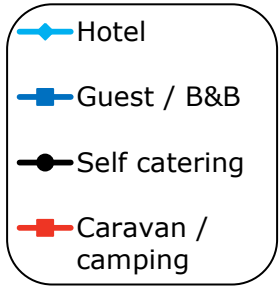
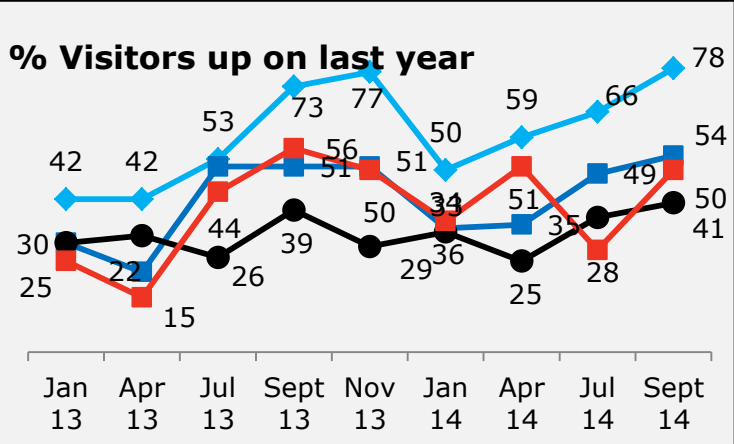
% change in visitor numbers:



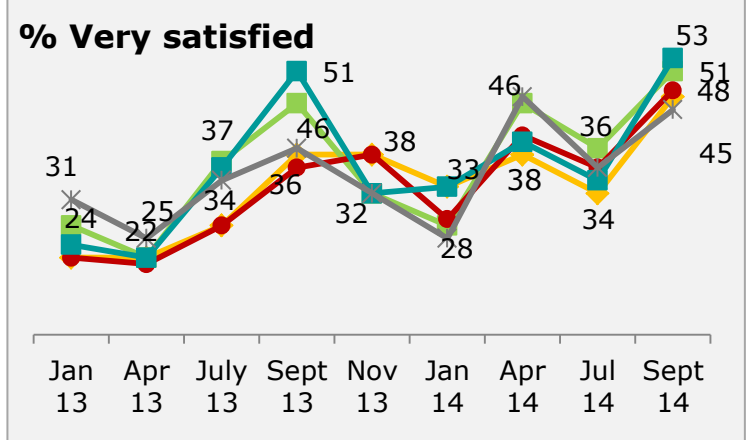
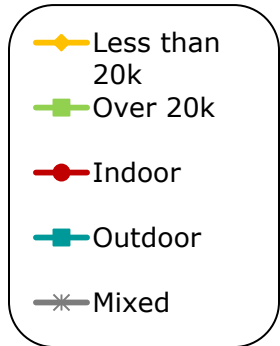
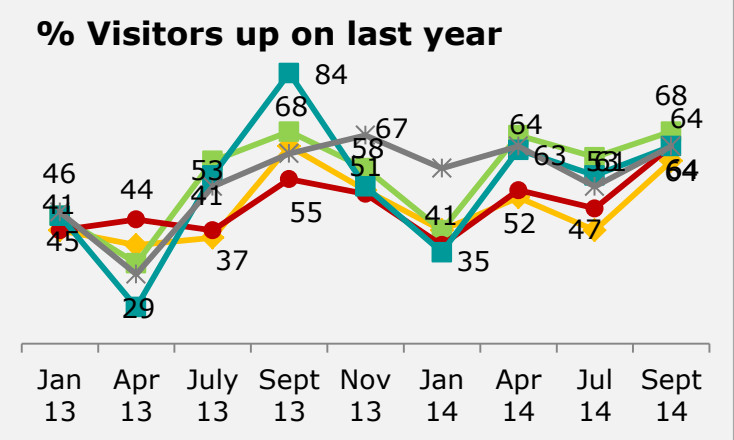
# Changing business performance: By business type

Numbers of both accommodation businesses and attractions reporting increases in visitors are up on the previous period Jul '14, and satisfaction levels are accordingly high.

## ACCOMMODATION - BY TYPE



## ATTRACTIONS - BY TYPE



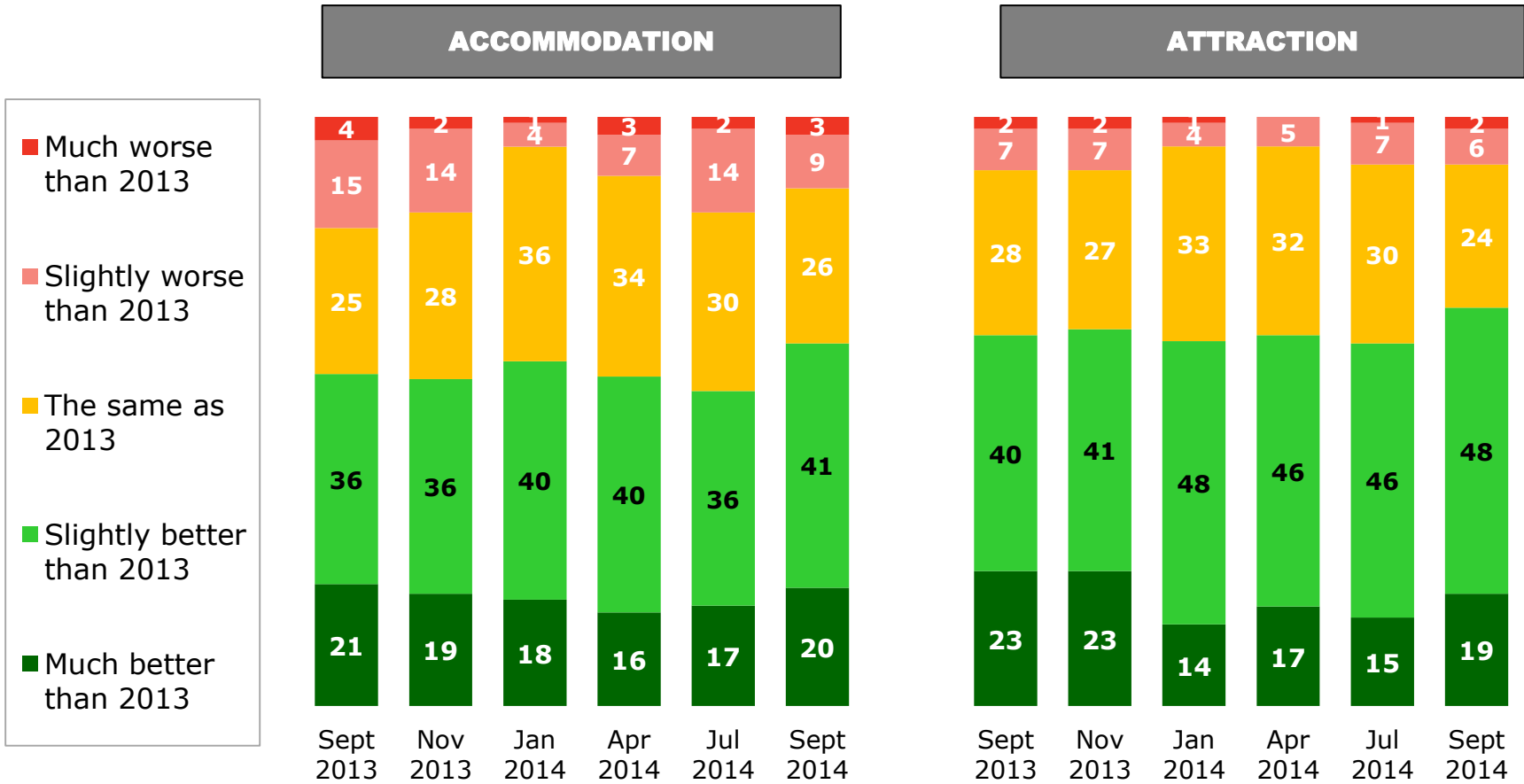
Business  
Confidence





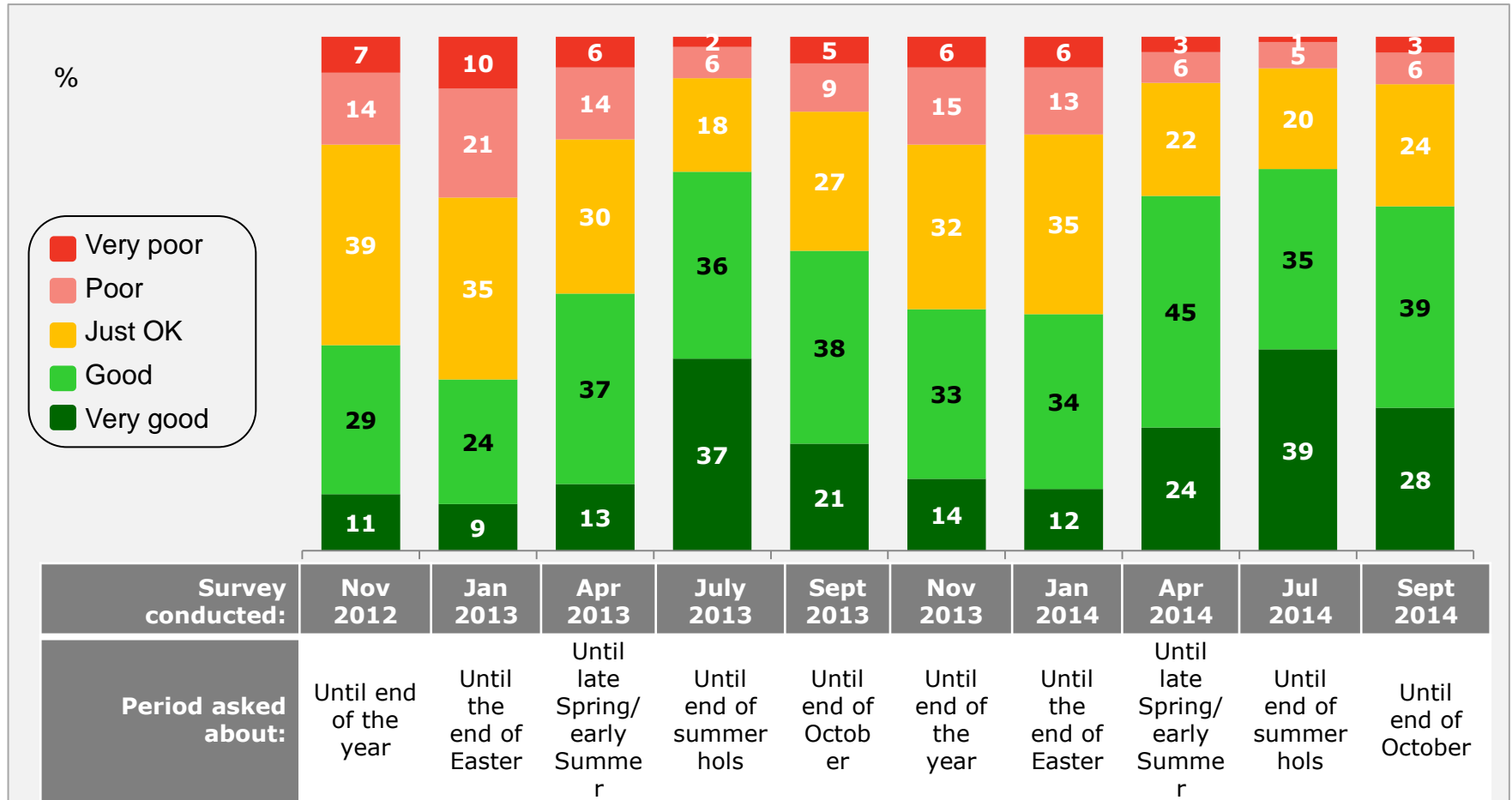
## Business optimism for 2014

Buoyed by a strong summer performance, business optimism for the calendar year is high, with the majority (61% accommodation businesses, 67% attractions) feeling that it will be a more successful year than 2013.



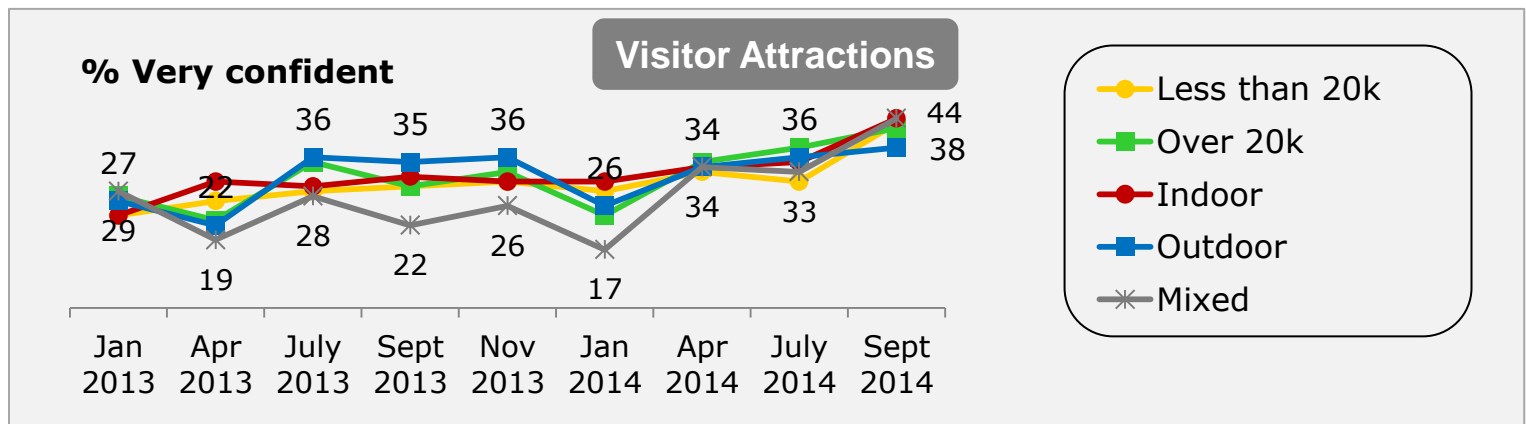
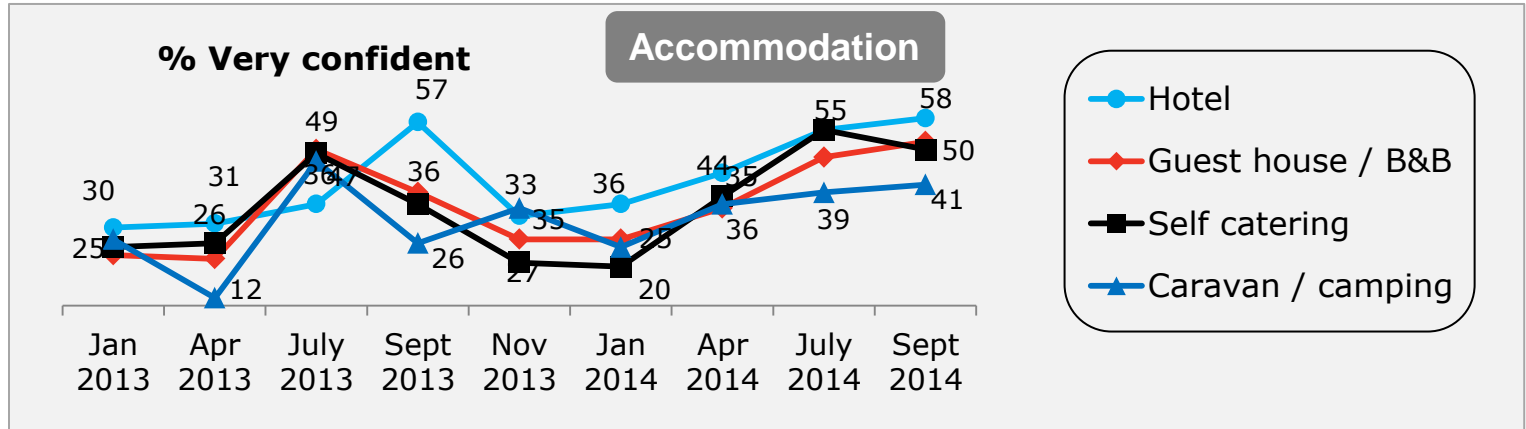
## Advance booking levels: Accommodation

Advance booking levels are as buoyant as they were in April this year which, discounting pre-summer periods, is better than at any other point recorded.



# Confidence in performance for forthcoming period: By business type

Confidence levels for the forthcoming period are particularly high, with more businesses of all types feeling very confident than at this point last year.



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

## Positive verbatim comments on business confidence



*Very optimistic - we've got a lot of school visits planned because they are doing projects on world war one and we have new exhibitions focused on that. (Visitor Attraction)*

*We have lots of activities and events planned and we are reviewing these activities; we have strong support from the council as well. (Visitor Attraction)*

*People are willing to spend more money on leisure activities and are not guarding their purse strings so much. (Visitor Attraction)*

*Very positive, a lot of conference and events booked and repeat business, which will give a high occupancy of rooms and have a positive impact on the business. (Accommodation)*

*I'm confident because we've had a good year, we have good staff and London is always busy with tourists. (Accommodation)*

*Our business is growing and we are gaining more customers both locally and further afield. (Accommodation)*



## Negative verbatim comments on business confidence

“

*There doesn't seem to be many people around and with all the other places open to the public in the local area, there are too many choices for visitors. (Visitor Attraction)*

*We're not feeling very confident because the last few months have been horrendous due to the world cup, the weather and economy and I don't think we can make up the loss this year. (Visitor Attraction)*

*Not many people coming to Blackpool, especially to stay overnight, people just staying the day and leaving. (Accommodation)*

*There are too many others hotels around, and people are taking more holidays abroad. (Accommodation)*

*Bookings are very slow at this time in the year, people are doing last minute bookings. (Accommodation)*

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