

# Tourism Business Monitor 2015

Wave 1 – Christmas and New Year



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

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:

**Jan 2015:** 5-9 Jan 2015, reviewing the Christmas and New Year period 2014

**Nov 2014:** 3-9 Nov 2014, reviewing mid-September until the end of the October

**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

Accommodation businesses and visitor attractions both improved visitor numbers compared with 2013, with an average growth of 6%. However, this tailed off slightly towards the end of the year for accommodation, with fewer businesses growing their numbers during the Christmas and New Year period.

Growth in the attractions market has remained fairly consistent since Easter 2014. There is more variation in the accommodation market. The campsite sector continues to strengthen, with two thirds reporting an improvement in visitor numbers for the Christmas and New Year period, no doubt associated with the clement start to the winter across most of England. Hotels remain satisfied with their performance, although fewer exceeded the previous year's visitor numbers than in recent periods.

Advance booking of accommodation has dipped since the summer, which is expected, but is slightly higher than at the same time last year.

Confidence levels remain strong, although there has been notable drops among the more weather-dependent caravan/campsite and outdoor attraction businesses as we approach the colder winter months.

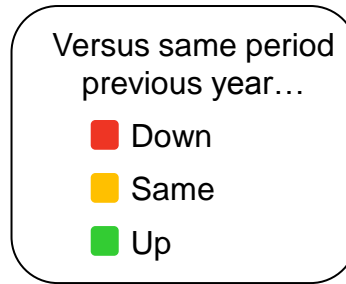
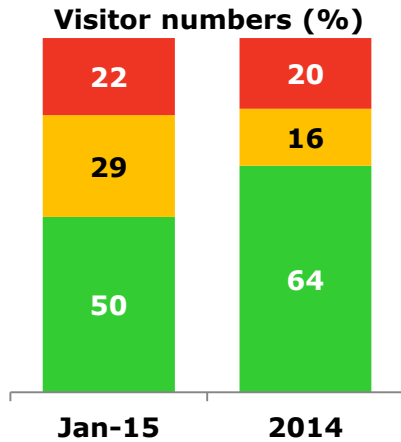
Buoyed by the successful summer and post-summer holiday periods, both accommodation and attraction businesses are feeling fairly optimistic about 2015 as a whole being better than 2014.

# Business Dashboards

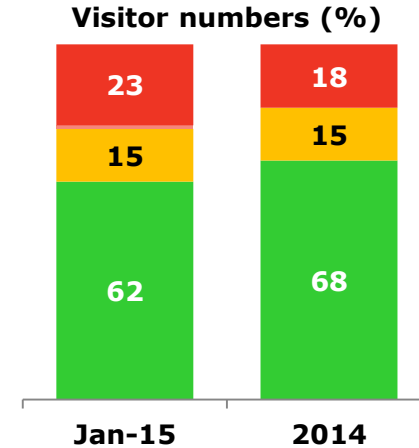


# Business Performance Dashboard

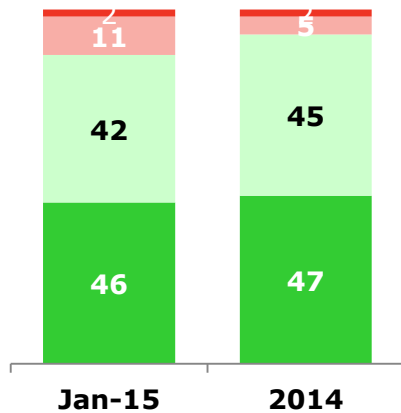
## ACCOMMODATION



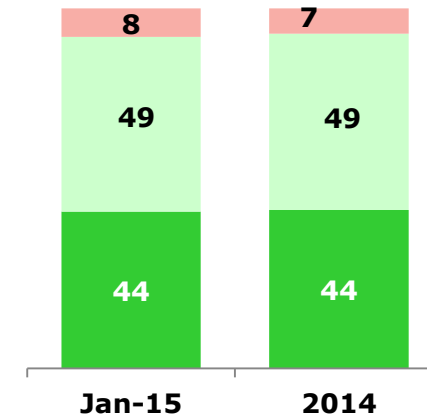
## VISITOR ATTRACTIONS



## Satisfaction (%)



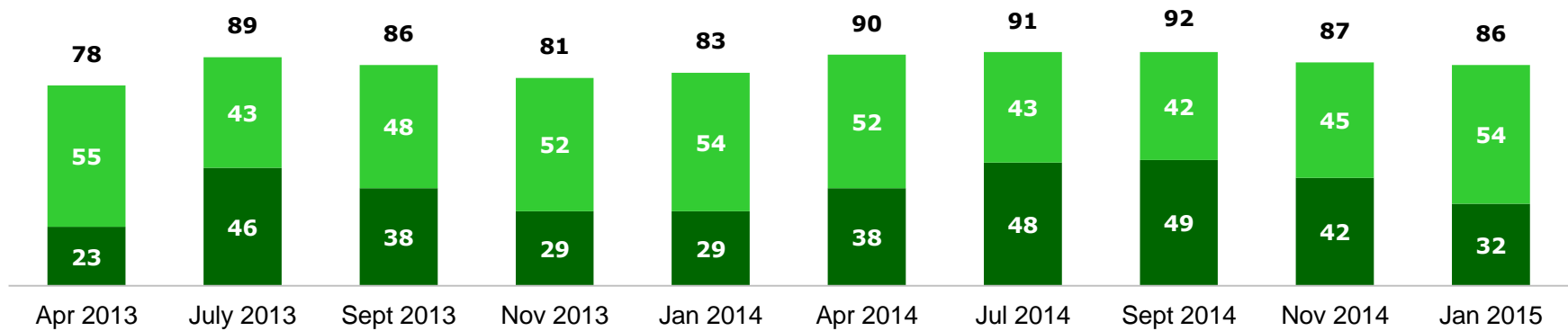
## Satisfaction (%)



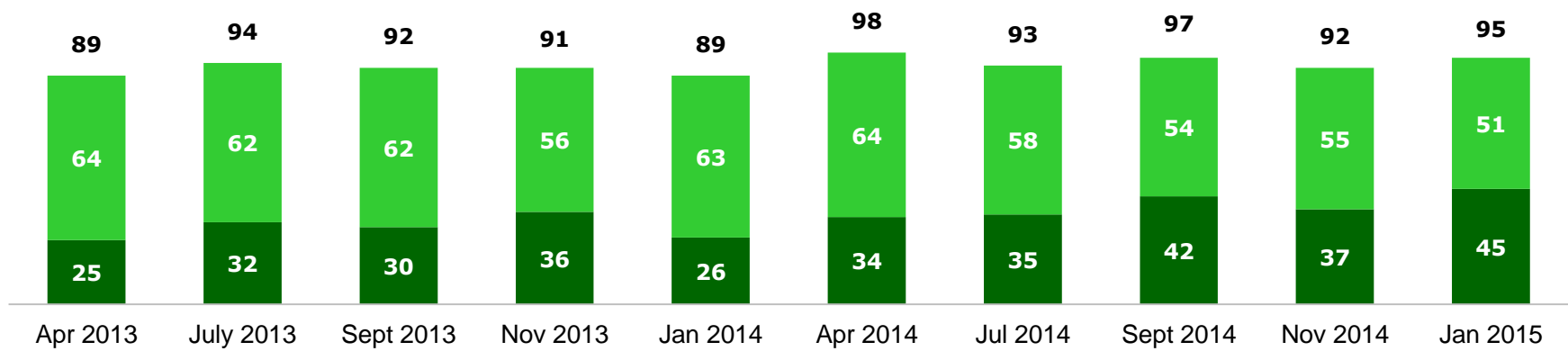
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE  
Jan 2015: Christmas and New Year period 2014

# Business Confidence Dashboard: confidence for next 1.5-2.5 months

## ACCOMMODATION



## ATTRACTIONS



Until early Summer	Until end of school summer holidays	Until end of October	Until end of the year	Until the end of Easter	Until early Summer	Until end of school summer holidays	Until end of October	Until end of the year	Until end of Easter
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# Visitor Profile

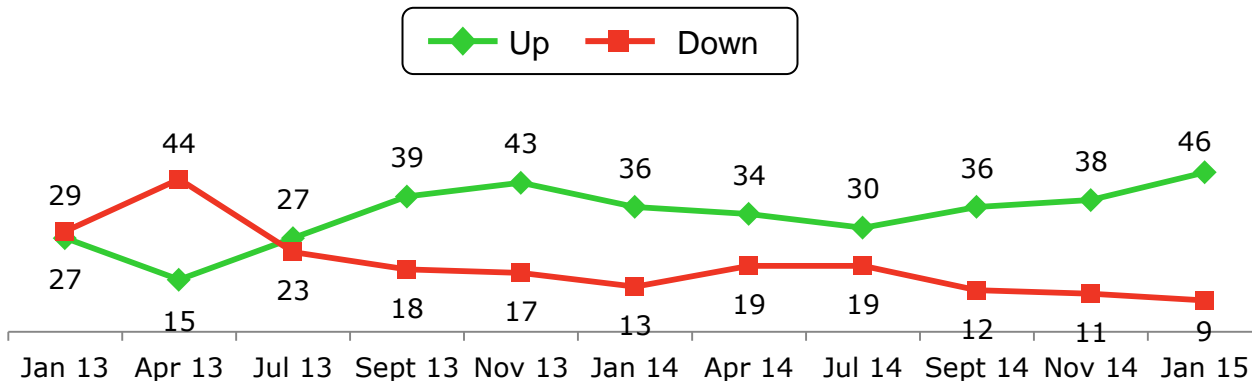




# Changing Visitor Profile (year-to-date vs. previous year): Accommodation



**Domestic visitors**

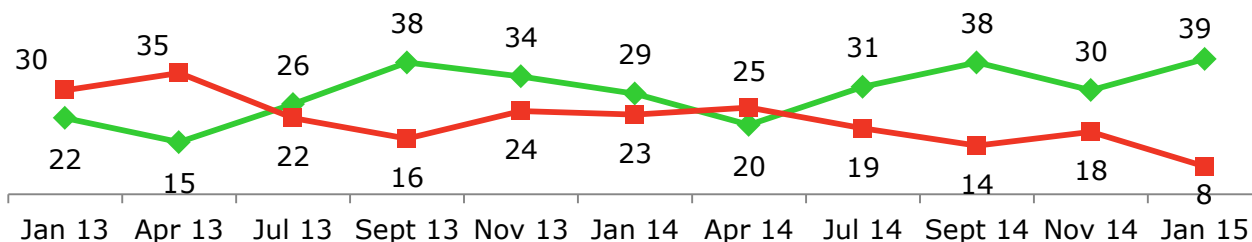


**NET:  
Up - Down**

**+37**



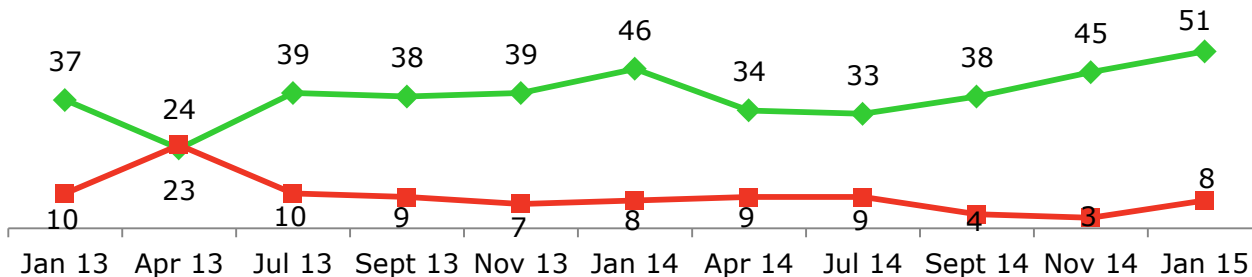
**Overseas visitors**



**+31**



**Repeat visitors**



**+43**

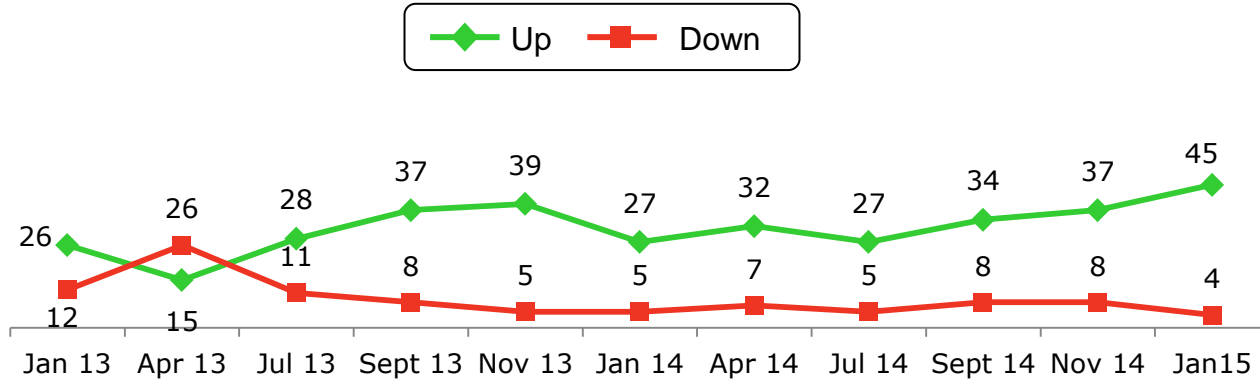
**PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE**

Jan 2015: The whole of 2014

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



Visitors from immediate locality

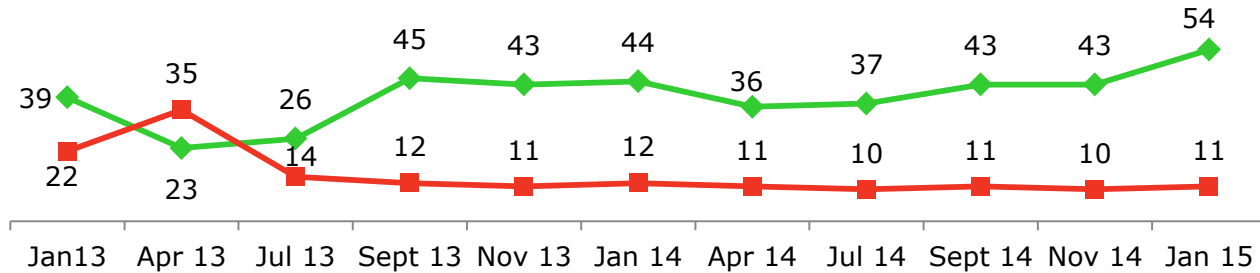


NET:  
Up - Down

+41



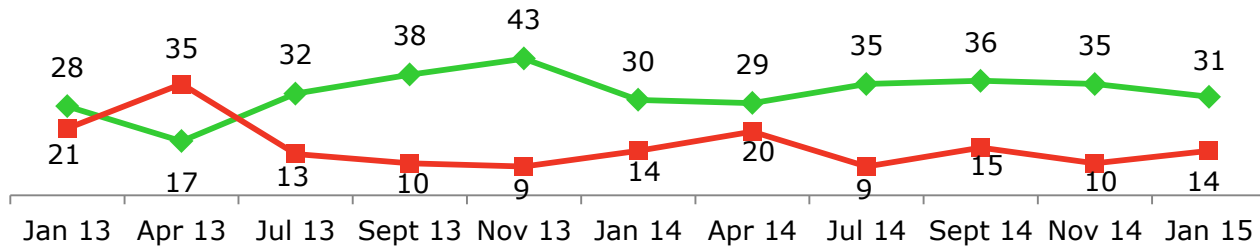
Other domestic visitors



+43



Overseas visitors



+17

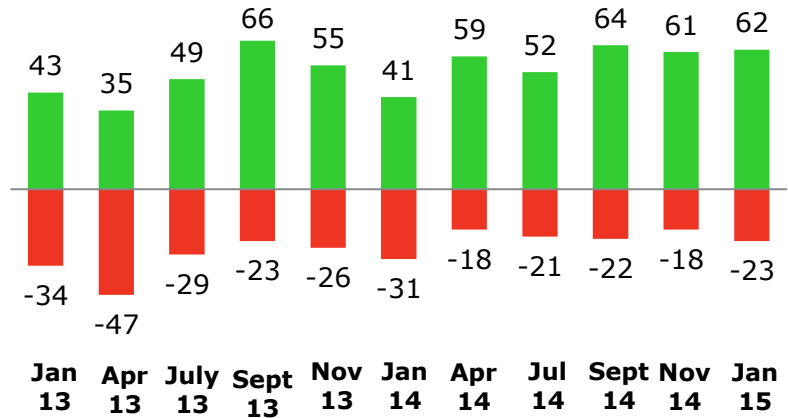
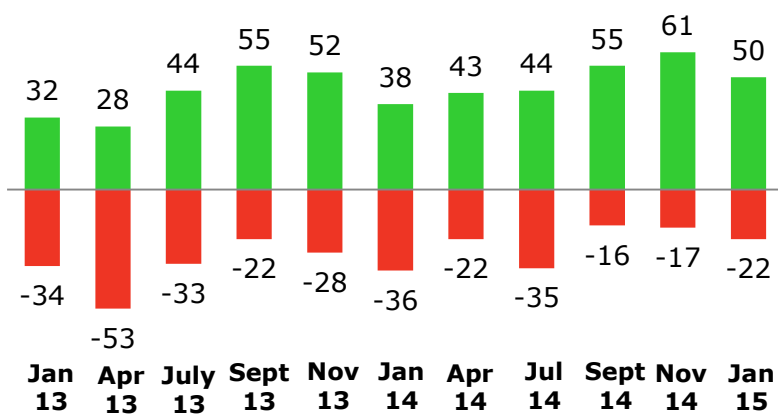
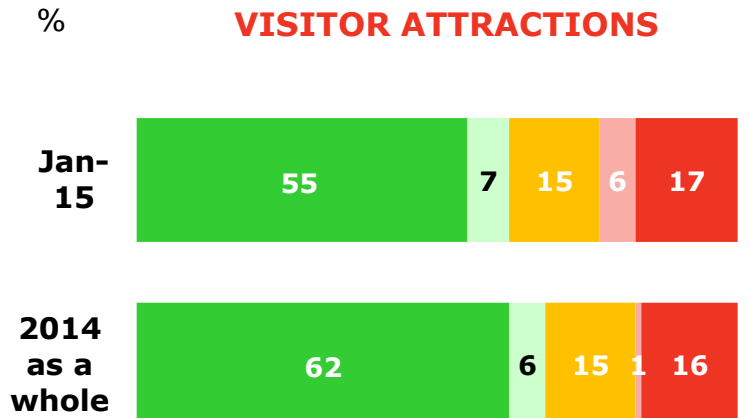
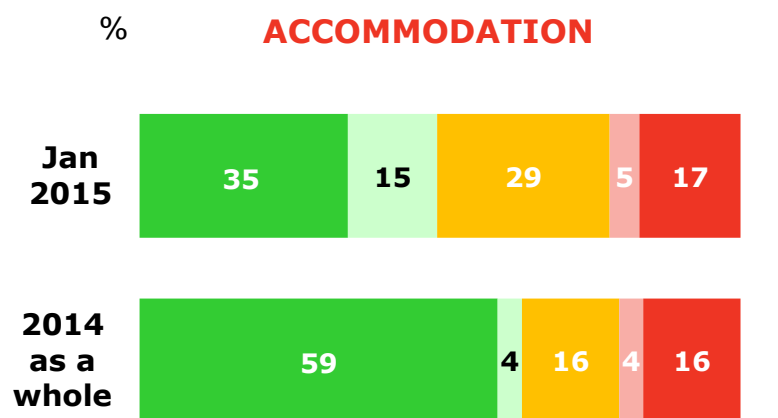
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE  
Jan 2015: The whole of 2014

# Business Performance



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

Accommodation businesses and visitor attractions both improved visitor numbers compared with 2013. However, this tailed off slightly towards the end of the year for accommodation, with fewer businesses growing their numbers during the Christmas and New Year period.

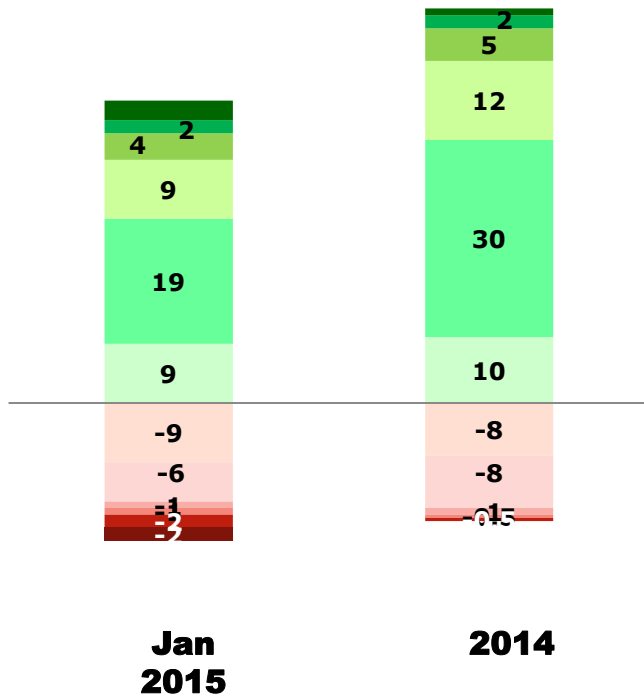


**PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE**  
**Jan:** Christmas and New Year period / **Apr:** Easter period / **Jul:** After Easter holidays up until mid-July / **Sept:** Mid-July up until the end of the summer holidays / **Nov:** Mid-September until the end of October

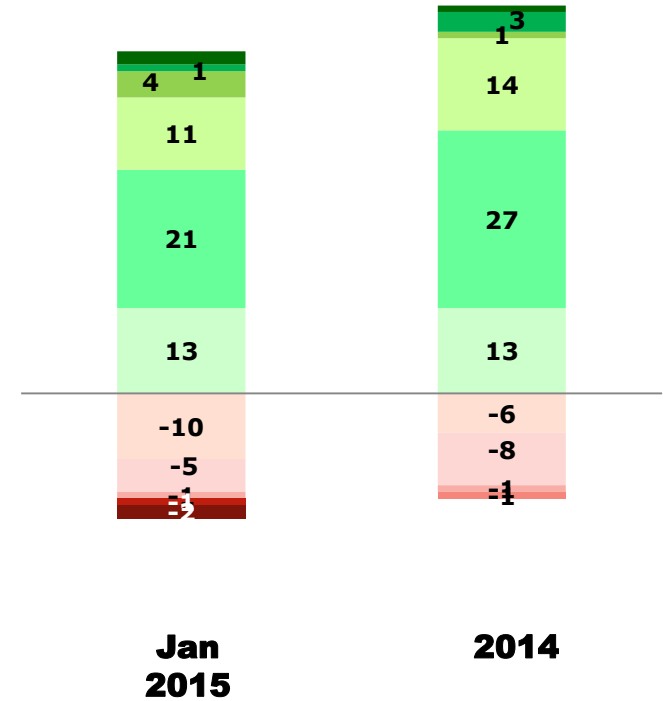
# Visitor Numbers: Year-on-year changes (%)

Both business types have seen growth of 6% across 2014 as a whole, with attractions performing slightly better over the Christmas and New Year period.

## ACCOMMODATION



## VISITOR ATTRACTIONS



Increase in visitors...

- Over 50%
- 31-50%
- 21-30%
- 11-20%
- 5-10%
- Less than 5%

Decrease in visitors...

- Less than 5%
- 5-10%
- 11-20%
- 21-30%
- 31-50%
- Over 50%

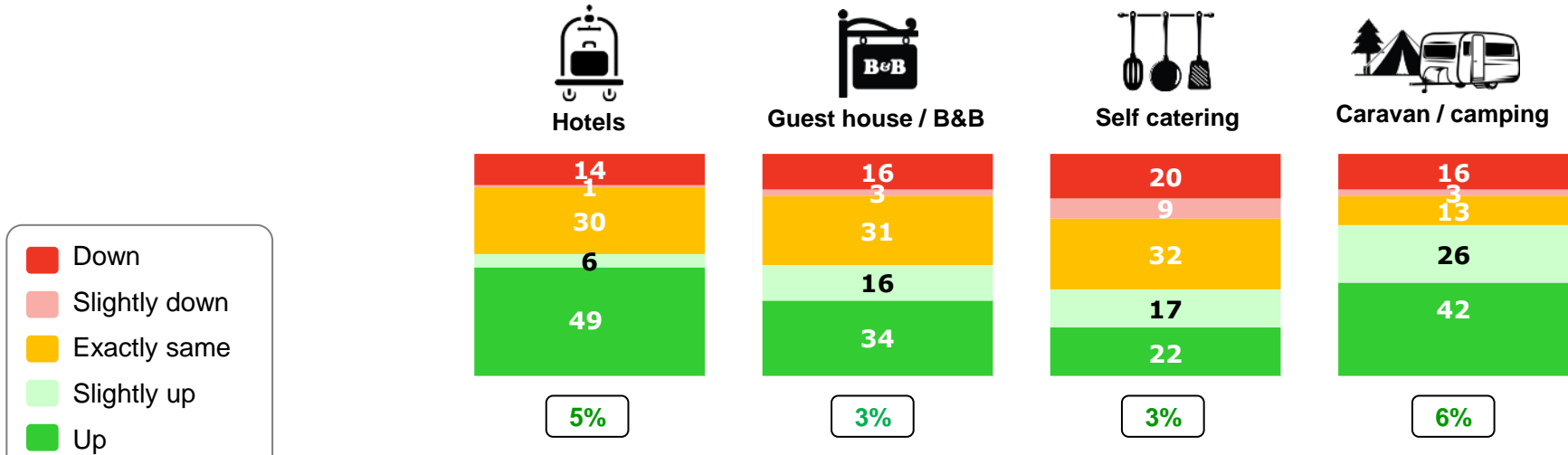
Average % change

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE  
Jan 2015: Christmas and New Year period

# Changing business performance: By business type

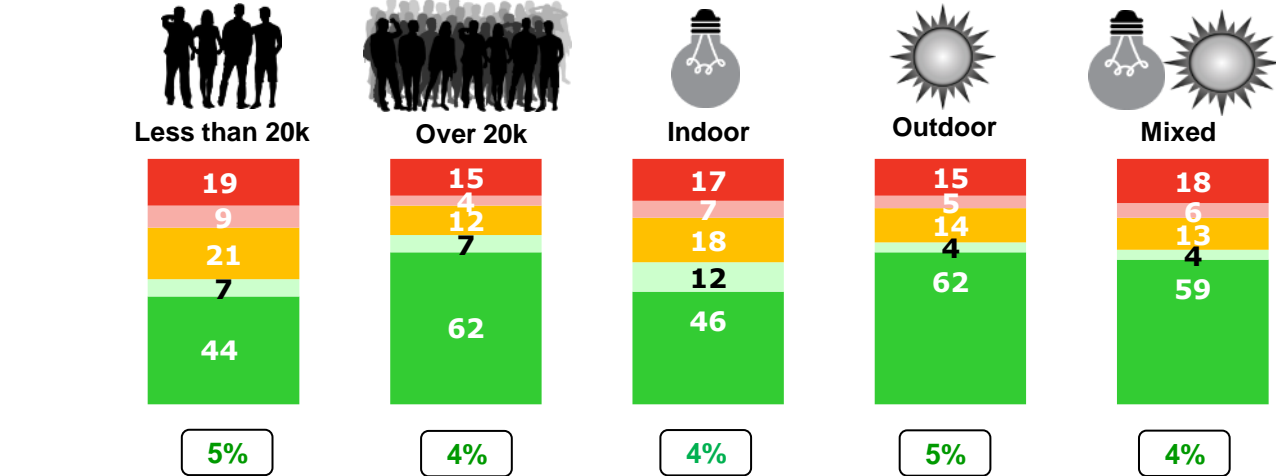
Larger attractions and hotels had a particularly successful Christmas and New Year, benefiting from more of the international seasonal holiday trips.

Attractions with an outdoor element (all outdoor or mixed sites) and campsites also fared well, no doubt associated with the clement start to the winter across most of England.



## ATTRACTIONS – BY TYPE

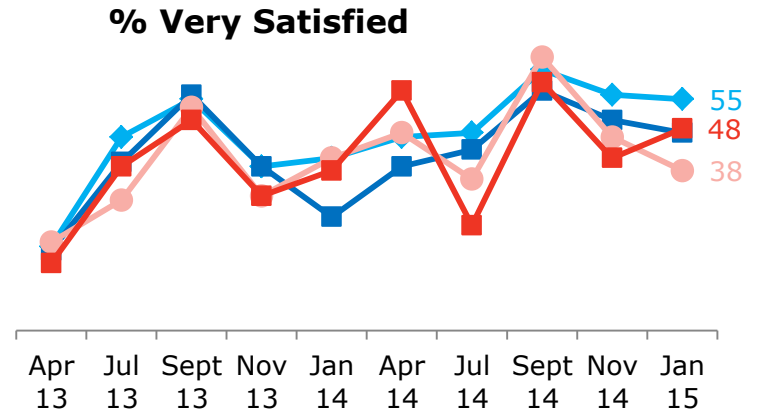
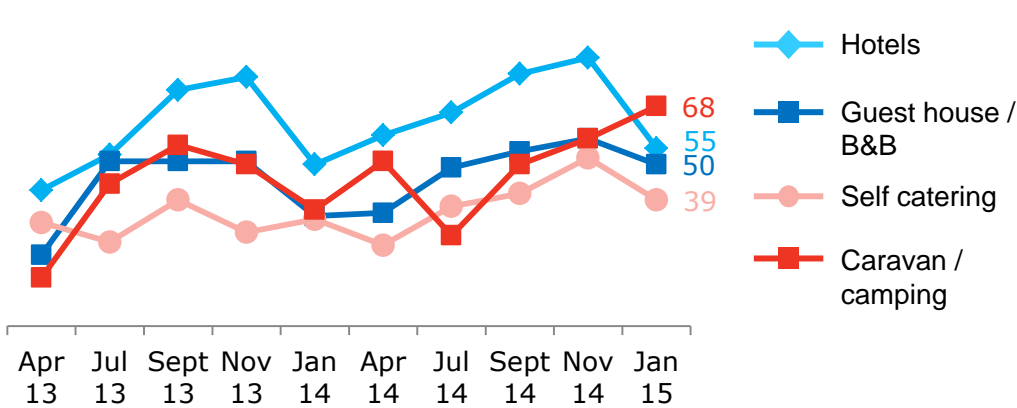
% change in visitor numbers:



# Changing business performance: By business type

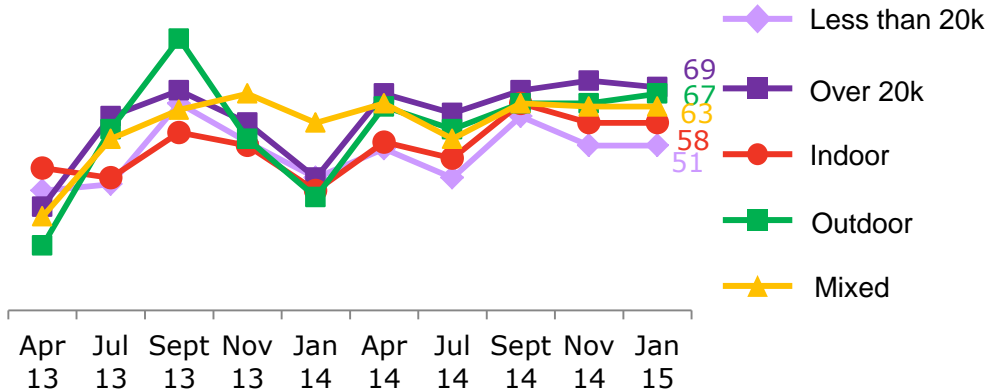
Growth in the attractions market has remained fairly consistent since Easter 2014. There is more variation in the accommodation market. The campsite sector continues to strengthen, with two thirds reporting an improvement in visitor numbers for the Christmas and New Year period. Hotels remain satisfied with their performance, although fewer exceeded the previous year's visitor numbers than in recent periods.

## ACCOMMODATION - BY TYPE

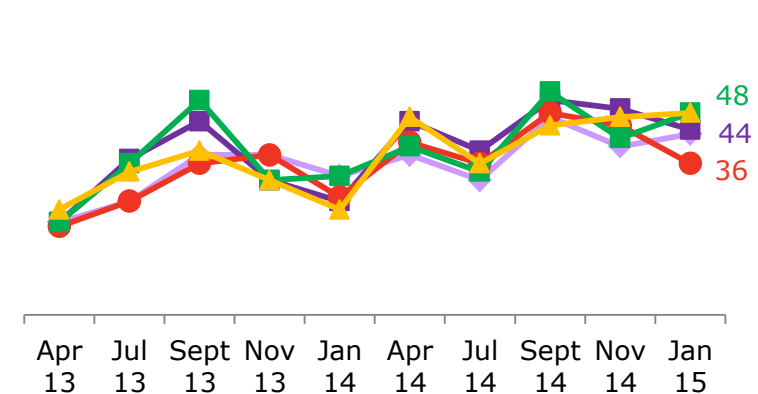


## ATTRACTION TYPE

### % Visitors up on last year



### % Very Satisfied



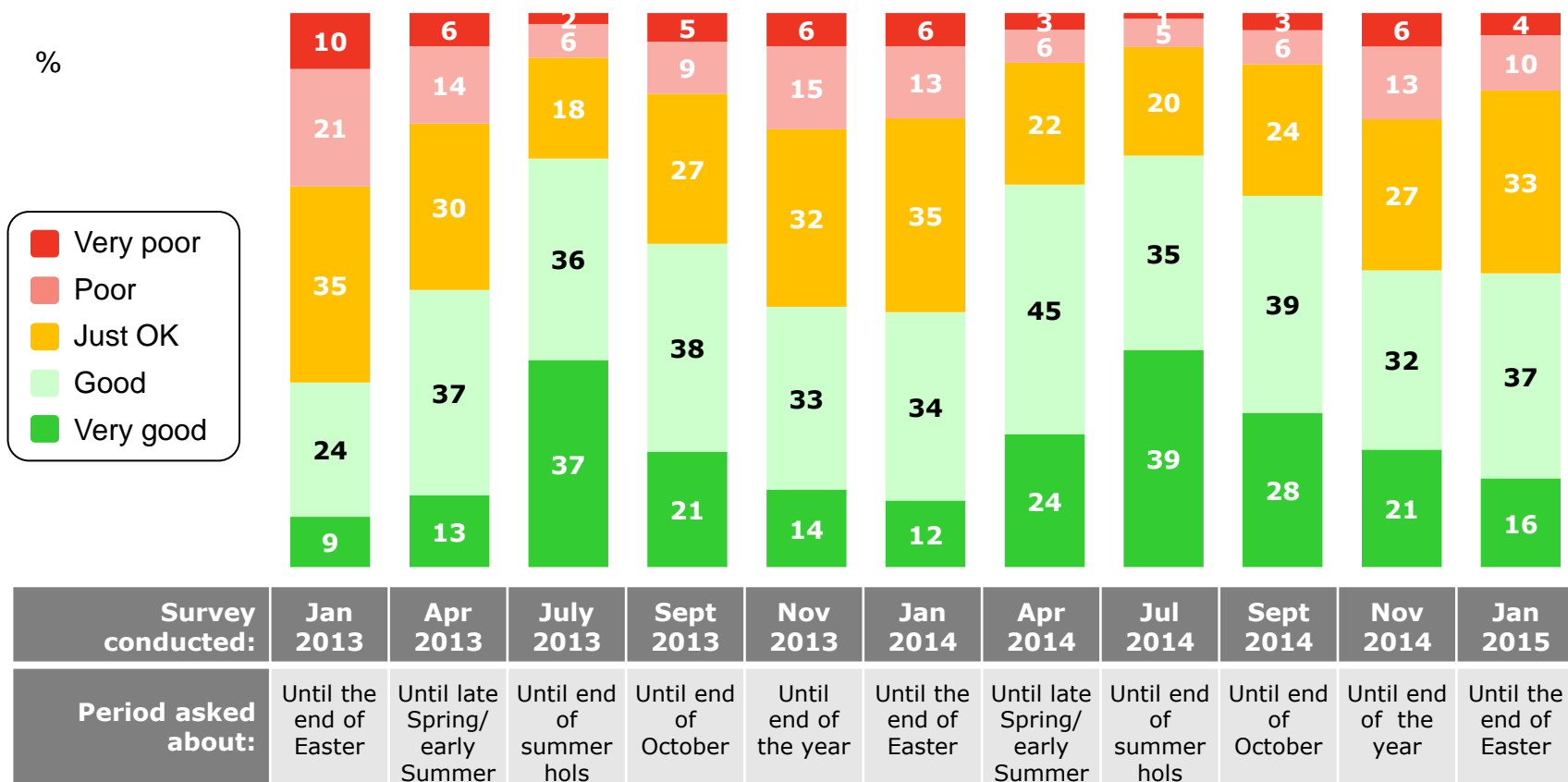
# Business Confidence





# Advance booking levels: Accommodation

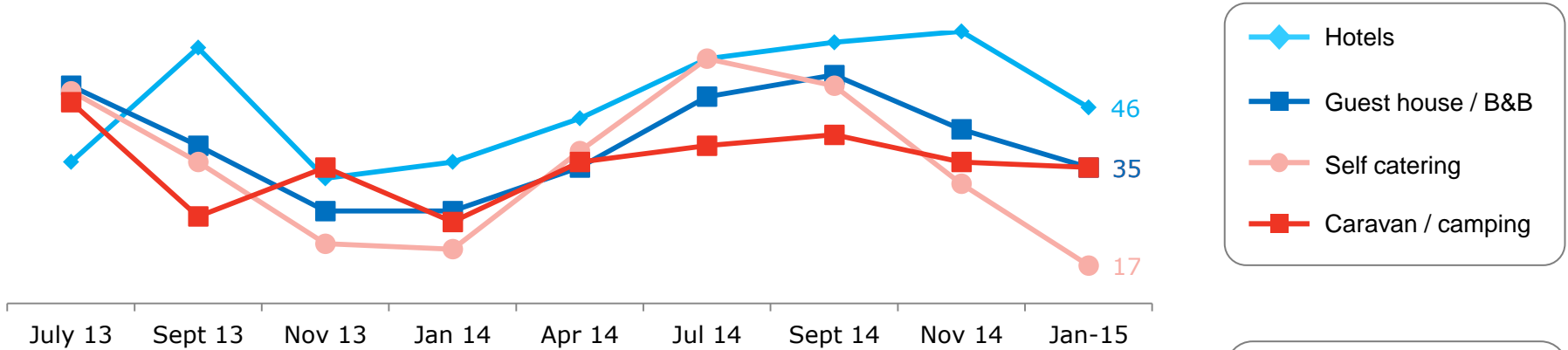
Advance booking levels have dipped since the summer, which is expected, but are slightly higher than at this same time last year.



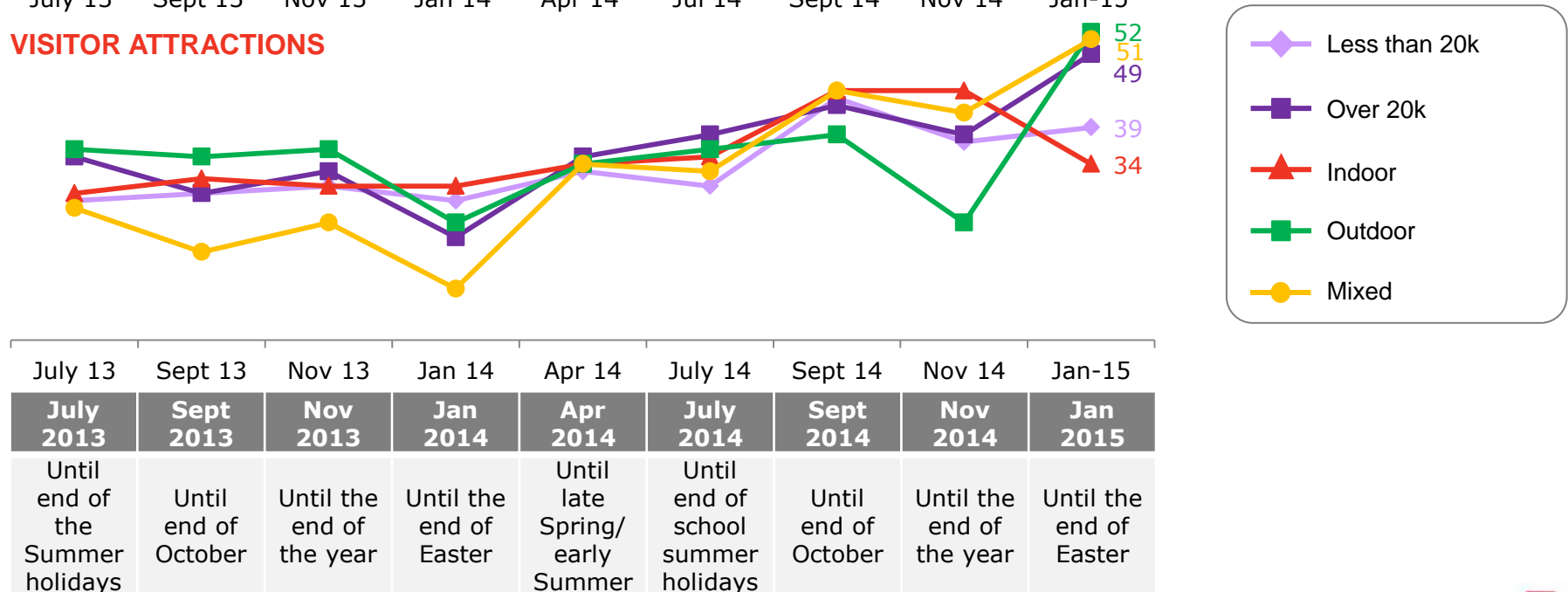
# Confidence in performance for forthcoming period: By business type

Confidence levels remain strong following summer, although there has been notable drops among the more weather-dependent caravan/campsite and outdoor attraction businesses as we approach the colder winter months

## ACCOMMODATION



## VISITOR ATTRACTIONS



## Positive verbatim comments on business confidence



*Factors such as the economy looking good and people staying in the UK for their holidays (Attraction)*

*We've got the marketing in place and it seems to be working. The number of tourists is increasing (Attraction)*

*I have lots of advanced ticket sales (Attraction)*

*Reasonable because we have already got booking in hand - we usually have bookings for between January and February but we already some for Easter (Accommodation)*

*Quite positive for the next two to three months as bookings look strong and we've had good feedback from a recent advertising campaign (Accommodation)*

*The fact that it has been a mild winter gives us better prospects and there are some local factors such as us being in Wembley - so we do well when Wembley has an event (Accommodation)*



## Negative verbatim comments on business confidence

“

*Not very good. Business has just dropped and dropped as we cater for the lower end of the market. Before we used to cater for people who wanted to spend one to two weeks, but I think people want shorter breaks now  
(Accommodation)*

*The business prospect for country properties is poor during winter months because of the weather and that will influence my bookings over the next coming months until Easter (Accommodation)*

*There aren't many bookings in there at the moment and we're going through quite a quiet period - December to January is always quiet (Accommodation)*

”

# Business optimism for 2015

Buoyed by the successful summer and post-summer holiday periods, both accommodation and attraction businesses are feeling fairly optimistic about 2015 as a whole being better than 2014.

## ACCOMMODATION

## ATTRACTIONS

