

Tourism Business Monitor 2016

Wave 2 – Post-Easter 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.

Telephone survey conducted 4-5 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 2016: 18-24 Apr 2016, reviewing the Easter period 2016

Jan 2016: 5-11 Jan 2016, reviewing the Christmas and New Year period 2015

Nov 2015: 2-8 Nov 2015, reviewing mid-September until the end of the October

Sept 2015: 3-10 Sept 2015, reviewing the period from end of May until the end of the school summer holidays

June 2015: 1-5 June 2015, reviewing the period from Easter up until the end of May

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

Tourism businesses experienced a challenging Easter 2016, with unusually high proportions of businesses reporting declines in visitors compared with the same period in 2015. Business performance over Easter has not been as positive as the rest of the year to date.

The weather and early Easter was at the root of many businesses explanations for their poorer performance this Easter. Storm Katie hit the UK late in the Easter weekend.

As a result, outdoor attractions and caravan/camping sites were more likely than other businesses to report a decline in visitors this Easter. Guest houses / B&Bs were also more likely to report declines in visitors.

However, the underlying feeling among businesses is that Easter was a blip rather than indicative of a longer term decline in visitors. Levels of confidence remain strong, the proportions of businesses expecting performance to be better in 2016 than 2015 are also as high as ever and advanced booking levels for accommodation businesses are also positive.

15% of accommodation businesses and 19% of attractions claim to have been affected by the flooding and severe wet weather in Dec 2015 / January 2016. Businesses more likely to claim to be affected were located in the North and in countryside / village locations.

Around half of businesses in flood-hit areas claimed that the floods resulted in fewer visitors than usual, a third of accommodation providers in these areas reported visitors cancelling trips and a third reported fewer forward bookings.

There is evidence of the impact of the floods extending beyond January 2016, with significant proportions of both accommodation and attraction providers continuing to report fewer visitors than usual because of the floods even after the end of January. Accommodation providers also reported continued lower levels of forward bookings and cancelled trips during the February to Easter period.

However, only a small fraction of accommodation providers reported cancelled trips stretching beyond Easter and this, allied with the continued strong levels of confidence for the remainder of the year, indicate that businesses generally feel that business performance will pick up from this point forward.

Business Dashboards

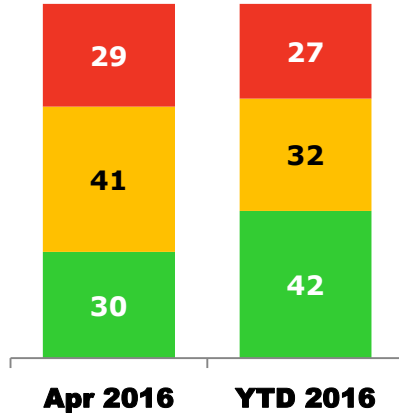


Business Performance Dashboard

Tourism businesses, particularly accommodation businesses, experienced a challenging Easter 2016, with unusually high proportions of businesses reporting declines in visitors compared with the same period in 2015. Business performance over Easter has not been as positive as the rest of the year to date.

ACCOMMODATION

Visitor numbers (%)

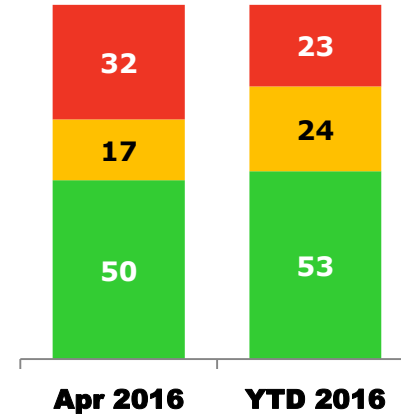


Versus same period previous year...

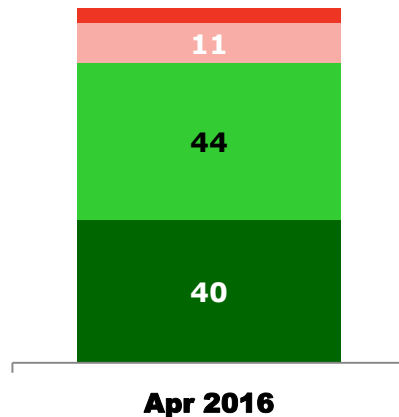
- Down
- Same
- Up

ATTRACTIONS

Visitor numbers (%)



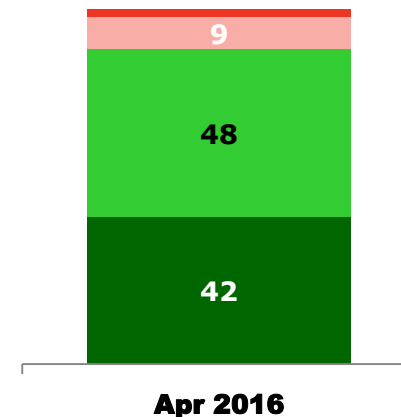
Satisfaction (%)



Satisfied with business performance...

- Not at all
- Not very
- Quite
- Very

Satisfaction (%)



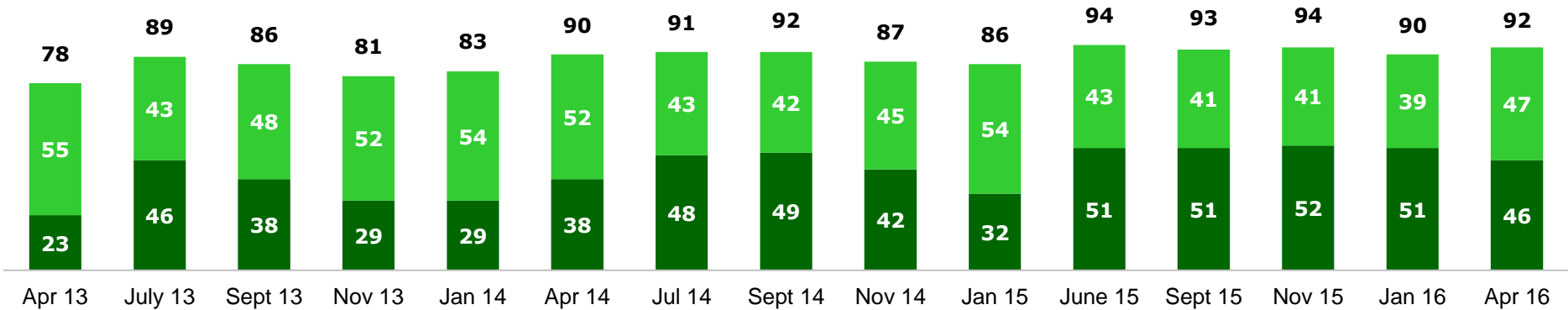
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
April 2016: Easter period 2016

Business Confidence Dashboard: confidence for next period

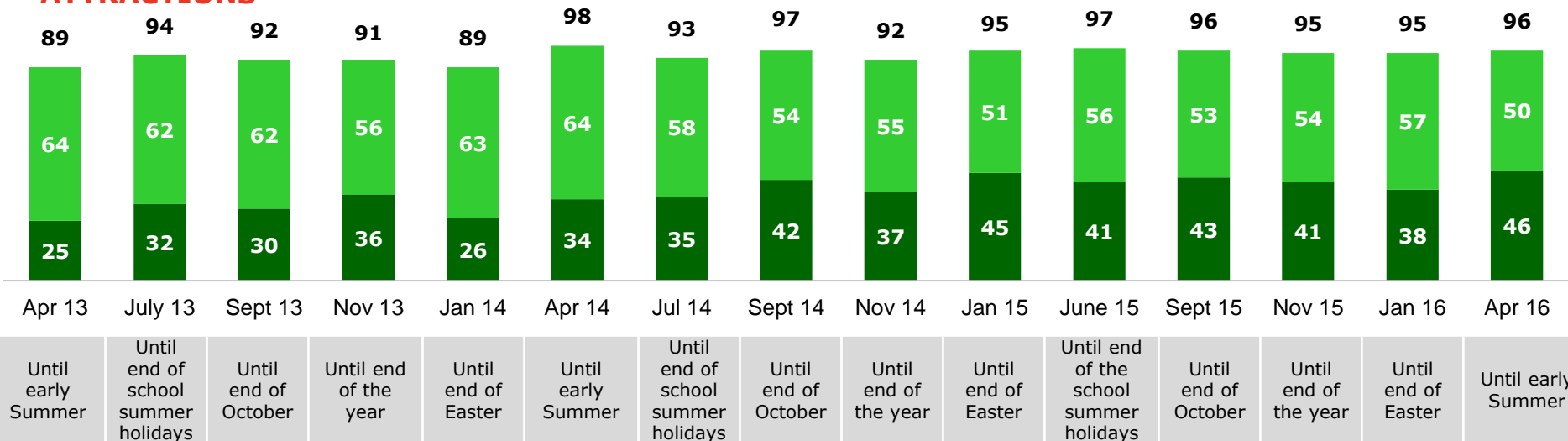
Whilst business performance has dipped during Easter, business confidence remains high. This suggests that businesses see Easter as a weather-related / early Easter blip rather than indicative of a longer term decline.

ACCOMMODATION

Very confident Fairly confident



ATTRACTIONS

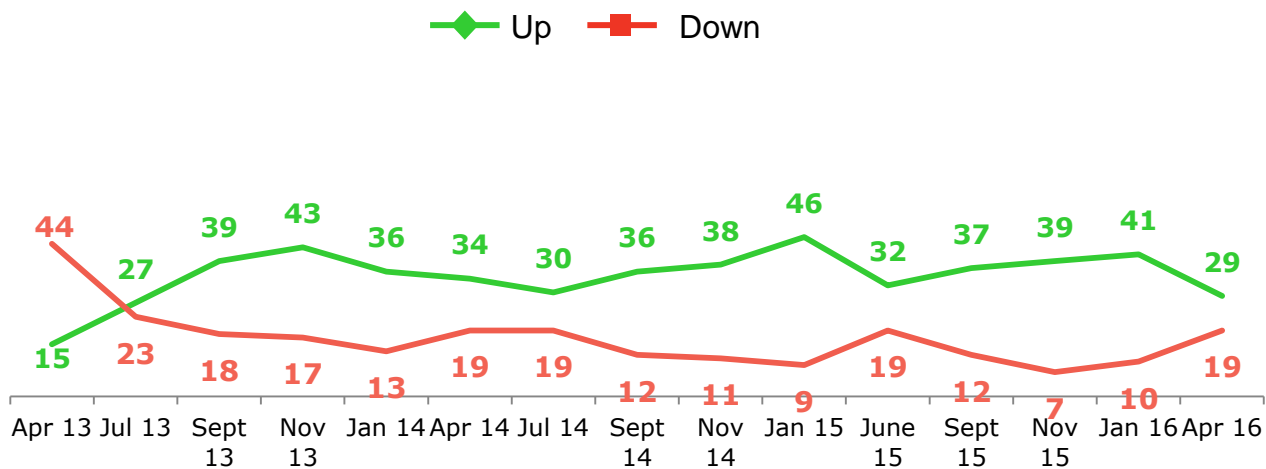


Visitor Profile



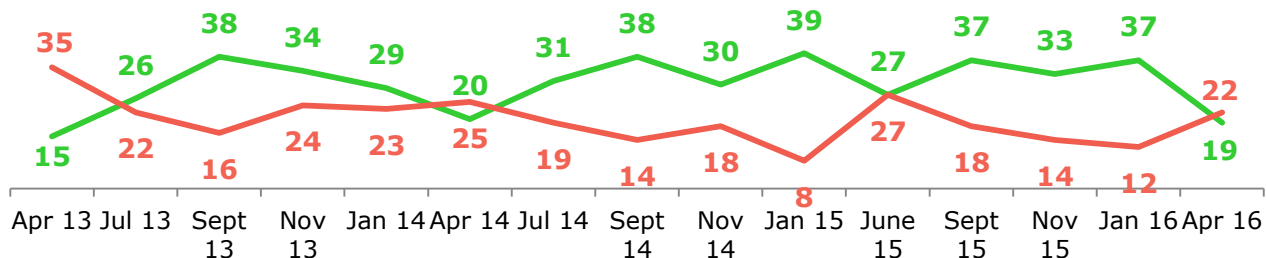
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

Easter 2016 still saw a greater proportion of accommodation businesses report an increase than a decrease in domestic visitors, although the gap was narrower than it has been for any of the previous eight periods. For the first time since Easter 2014, more businesses reported a drop in overseas visitors than an increase.



NET:
Up - Down

+10

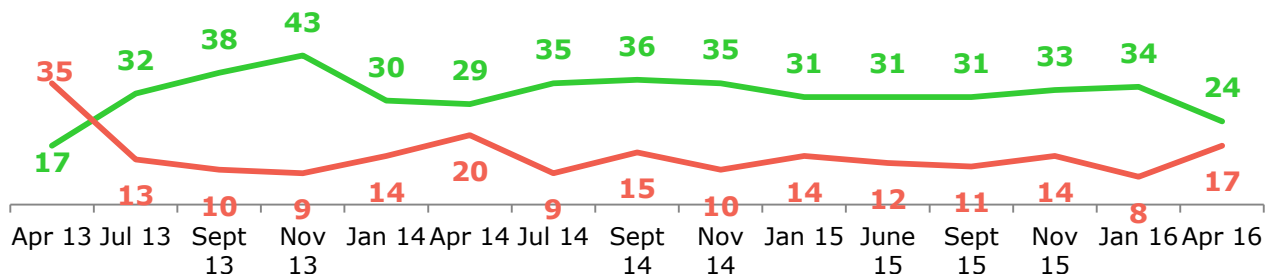
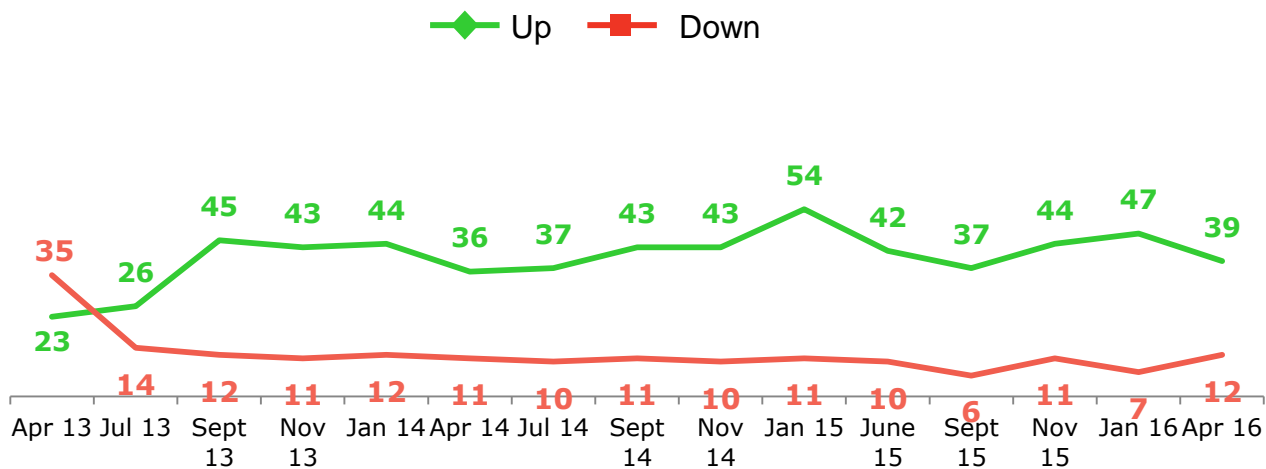


-3

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
April 2016: Easter period 2016

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

Attractions continue to be more likely to report increases in domestic and overseas visitors than decreases. However, levels of growth have slowed for overseas visitors.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
 April 2016: Easter period 2016

Business Performance

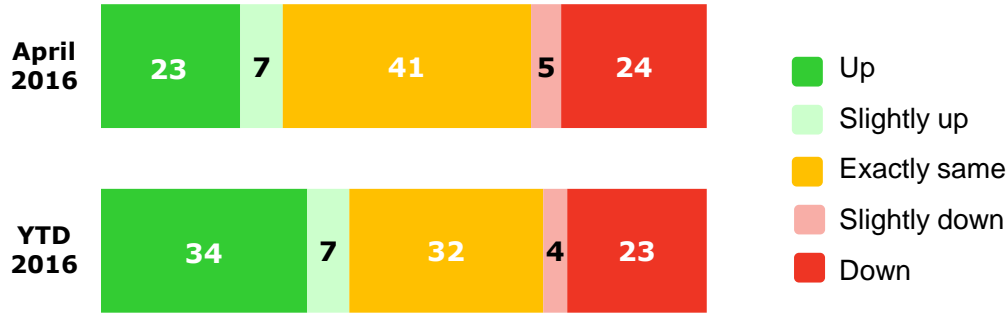


Visitor Numbers: Year-on-year changes (up /down)

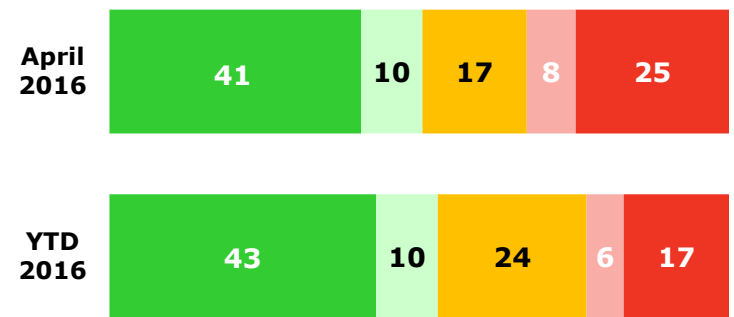
For accommodation establishments, only 30% experienced a growth in visits compared with the Easter period in 2015 (the lowest level for three years), with a similar proportion reporting a drop.

The proportion of attractions reporting an increase in visitors was higher, although a third still reported a decline during the Easter period.

% ACCOMMODATION

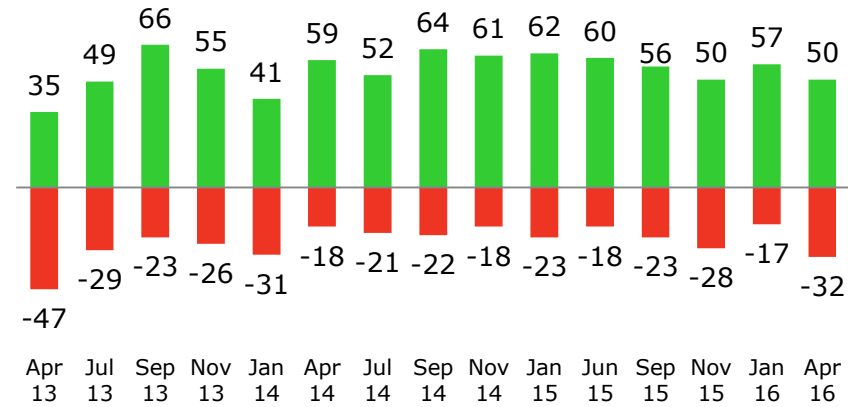
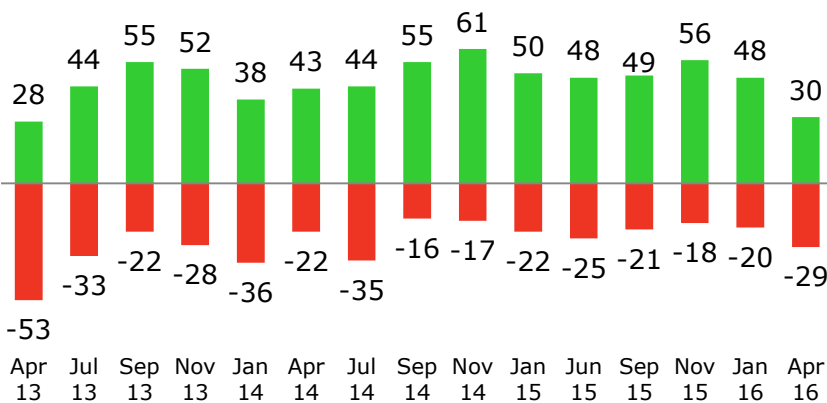


% ATTRACTIONS



- Up
- Slightly up
- Exactly same
- Slightly down
- Down

- Up
- Down



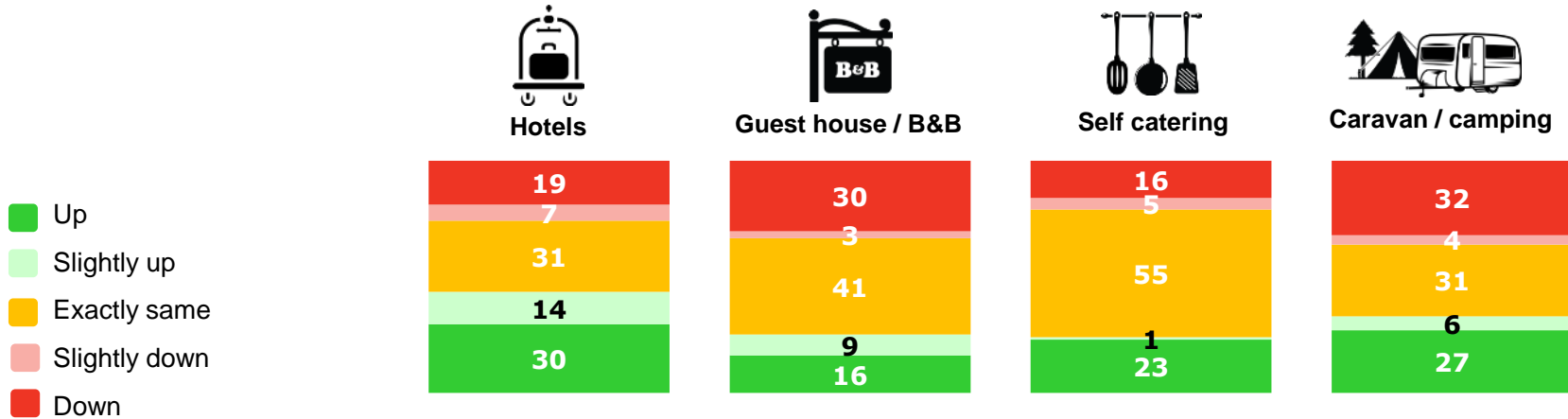
PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

Jan: Christmas and New Year period / **Apr:** Easter period / **June:** Easter up until the end of May / **Jul:** After Easter holidays up until mid-July / **Sept:** Mid-July/End of May (Sept 2015) up until the end of the summer holidays / **Nov:** Mid-September until the end of October

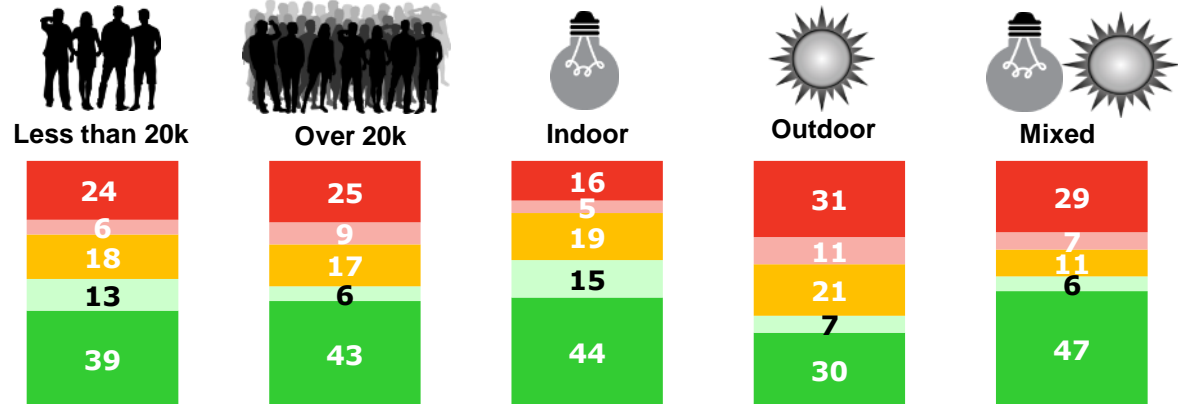
Changing business performance: By business type

The slowing of growth among accommodation establishments was most strongly felt amongst guest houses/ B&B's and camping/caravan sites, where a third of sites reported that numbers were down compared with Easter 2015. Among attractions, outdoor attractions were most likely to report decreases in visitors, reflecting the early Easter in 2016 and the mixed weather this year.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE



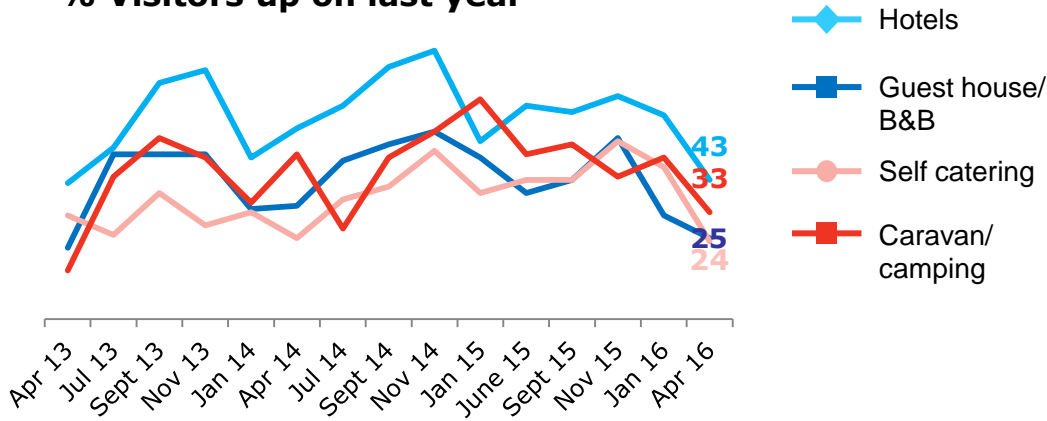
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
April 2016: The Easter period

Changing business performance: By business type (trends)

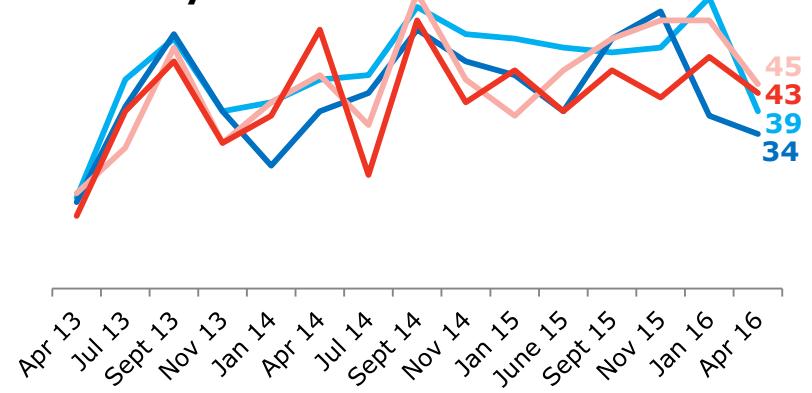
Although business performance dipped during Easter 2016, satisfaction levels held up relatively well, especially among attractions. This is perhaps an indication that Easter represented a weather-related / early Easter blip which was beyond their control rather than indications of a longer term decline.

ACCOMMODATION – BY TYPE

% Visitors up on last year

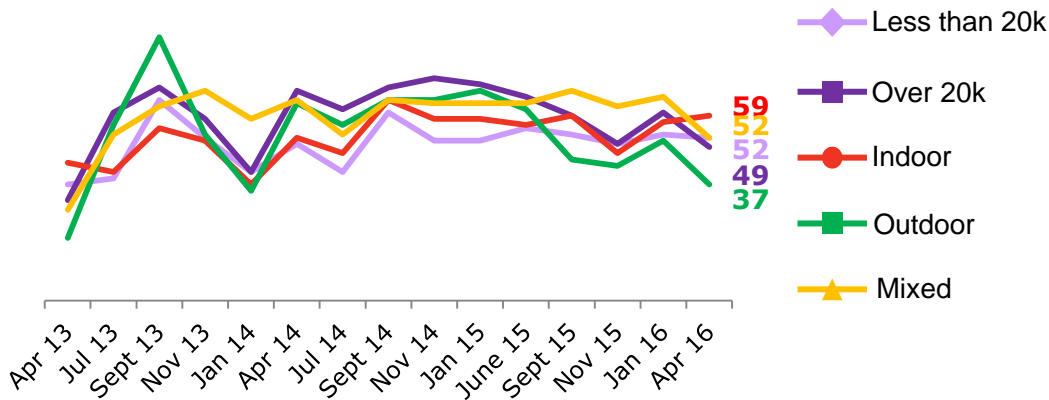


% Very Satisfied

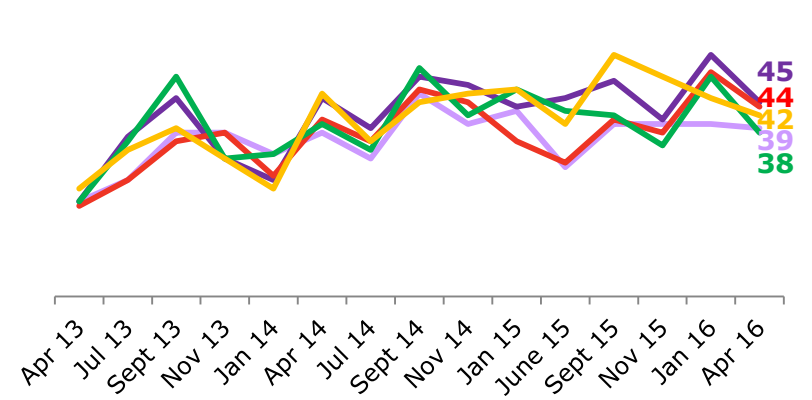


ATTRACTIONS – BY TYPE

% Visitors up on last year



% Very Satisfied



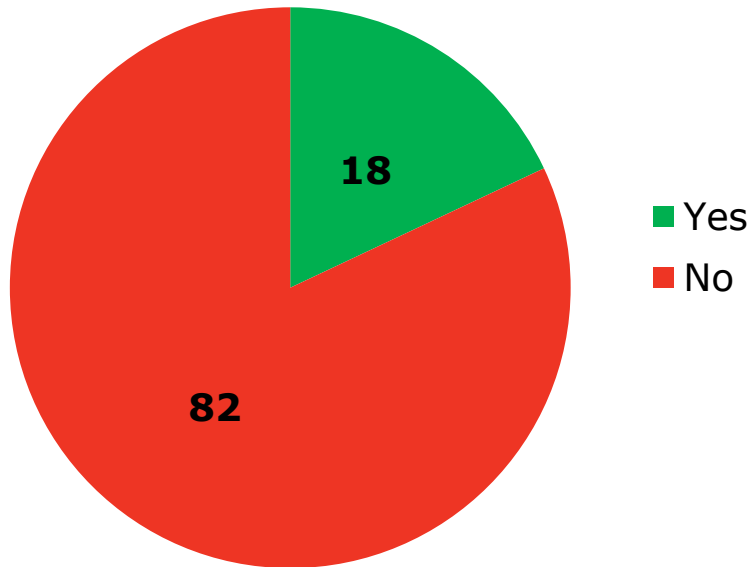
Impact of flooding



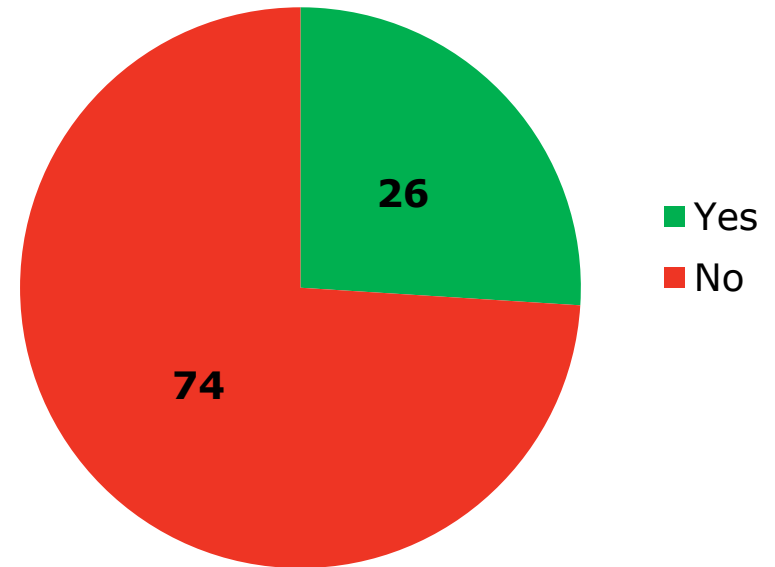
Situated in areas affected by flooding or severe wet weather

A quarter of attractions and a sixth of accommodation providers felt that they were situated in areas affected by the floods or severe wet weather of December 2015 / January 2016.

% Accommodation



% Attractions



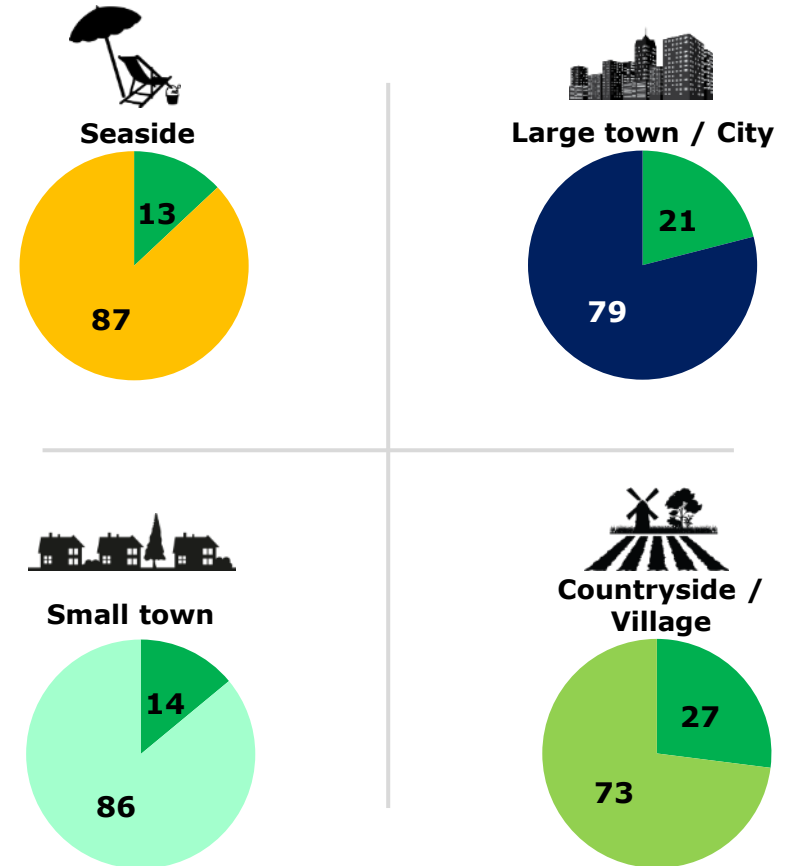
Situated in areas affected by flooding or severe wet weather: Location

Tourism businesses in the North and those situated in the countryside were more likely to feel that they were in areas affected by the floods and severe wet weather, although perceived impact was far from restricted to these locations.

% Region



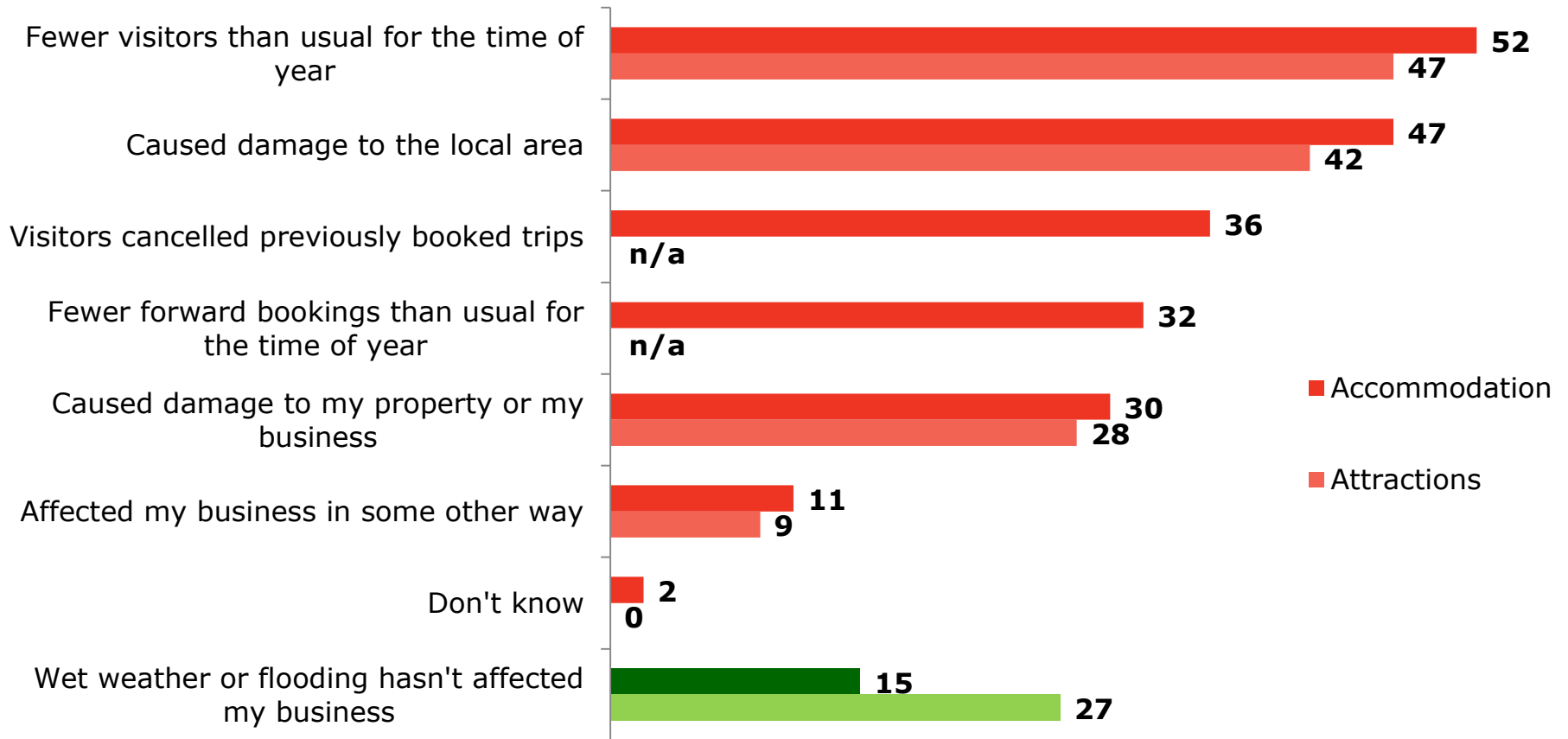
% Location



Impact of flooding and wet weather

Among those businesses in affected areas, 85% of accommodation businesses and 73% of attractions felt that wet weather or flooding had affected their business in some way. Half of tourism businesses in these areas had seen fewer visitors than usual. A third of accommodation businesses saw cancellations and a similar third experienced fewer forward bookings than usual.

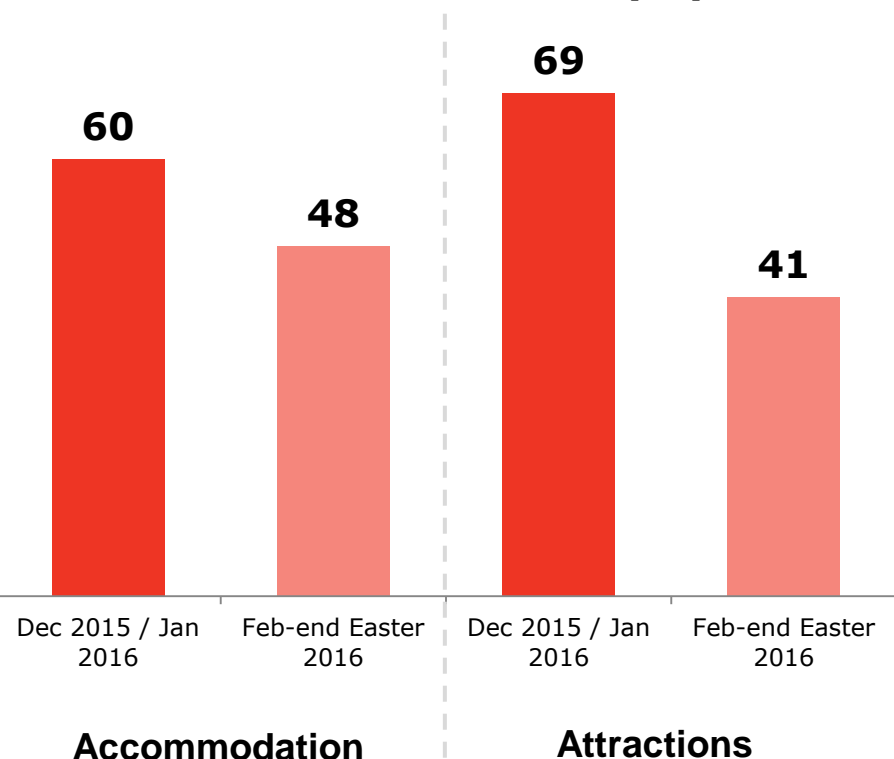
All businesses situated in affected areas (%)



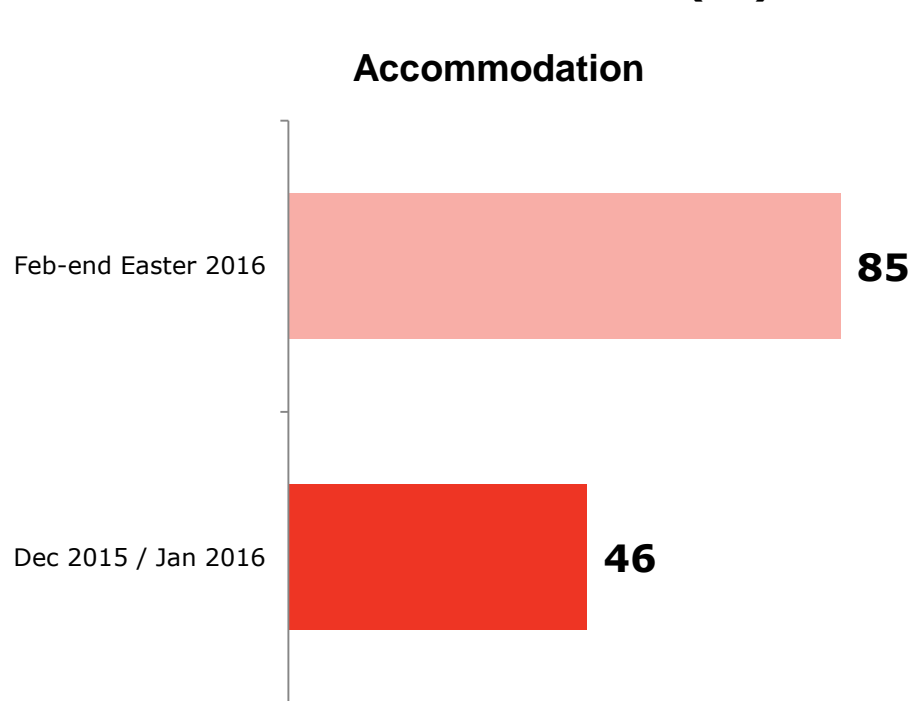
Ongoing impact of flooding or severe wet weather: Visitors and bookings

There is certainly some perceived ongoing impact of the flooding. 48% of accommodation establishments and 41% of attractions who experienced fewer visitors than normal (so a quarter of all accommodation and a fifth of all attraction businesses in flood affected areas) continued to report fewer visitors between February and the end of Easter. 85% of accommodation businesses experiencing fewer forward bookings due to the flooding (so a quarter of all those in flood affected areas) claimed that forward bookings were down during the February to end of Easter period.

When experienced fewer VISITORS than normal (%)



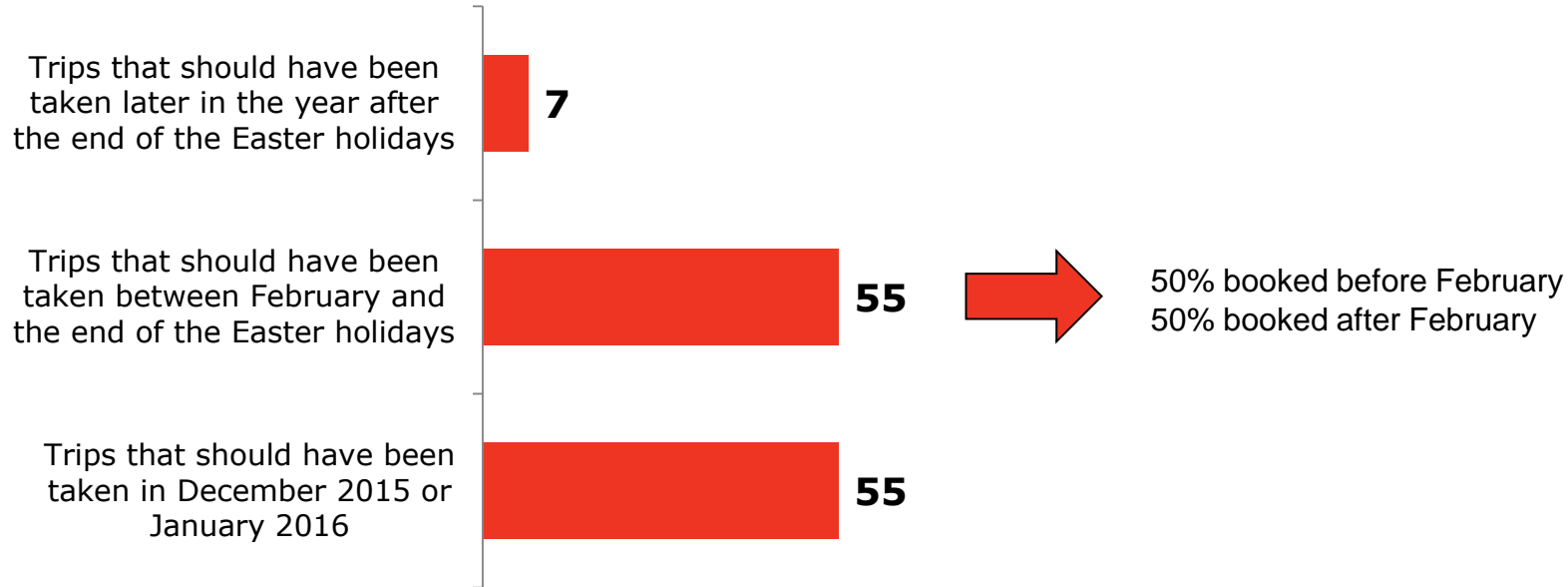
When experienced fewer FORWARD BOOKINGS than normal (%)



Ongoing impact of flooding and wet weather: Cancelled accommodation

Among the third of accommodation businesses in flood-affected areas who reported cancelled bookings as a result of the floods, around half of these (so a fifth of all businesses in flood affected areas) reported cancellations for the period between February and end of Easter. However, only 7% of these businesses (just 2% of all businesses in flood affected areas) have so far reported cancellations beyond the Easter period.

Intended timing of cancelled trips (%)

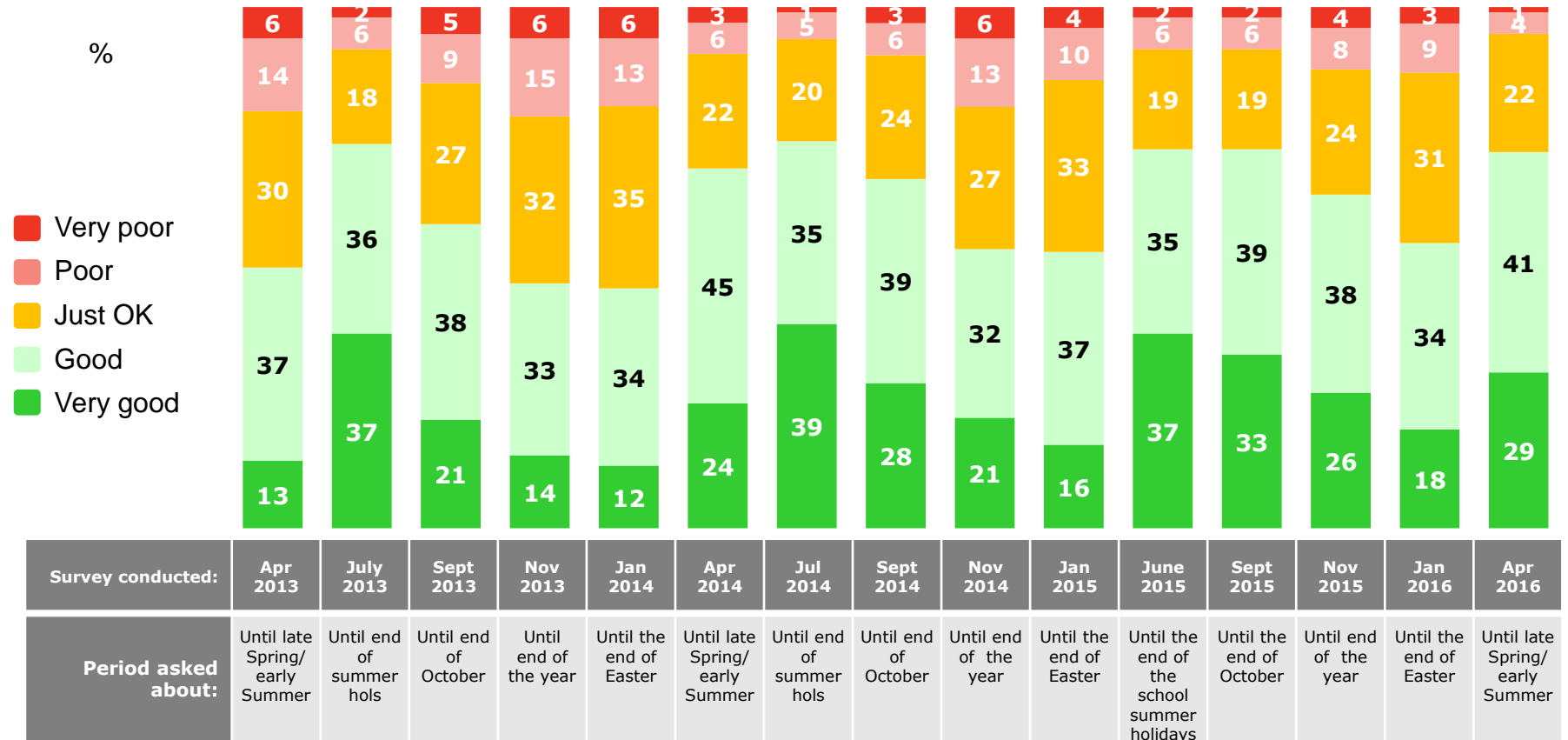


Business Confidence



Advance booking levels: Accommodation

Advance booking levels are strong among accommodation establishments, indicating that the indifferent business performance experienced over Easter is not indicative of longer term decline.

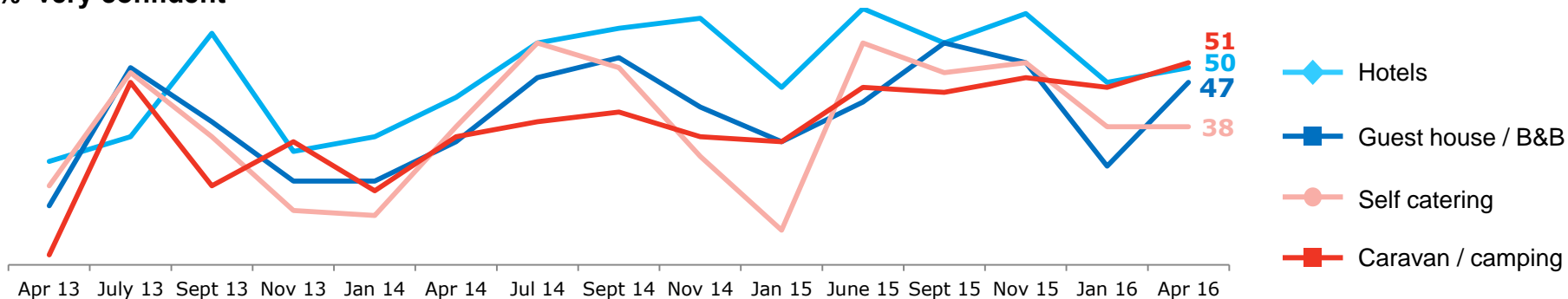


Confidence in performance for forthcoming period: By business type

Strong booking levels has helped to keep business confidence high across all accommodation types except perhaps self-catering providers. This confidence is shared by the attractions market, where business confidence over the next 2-3 months continues to increase across the board.

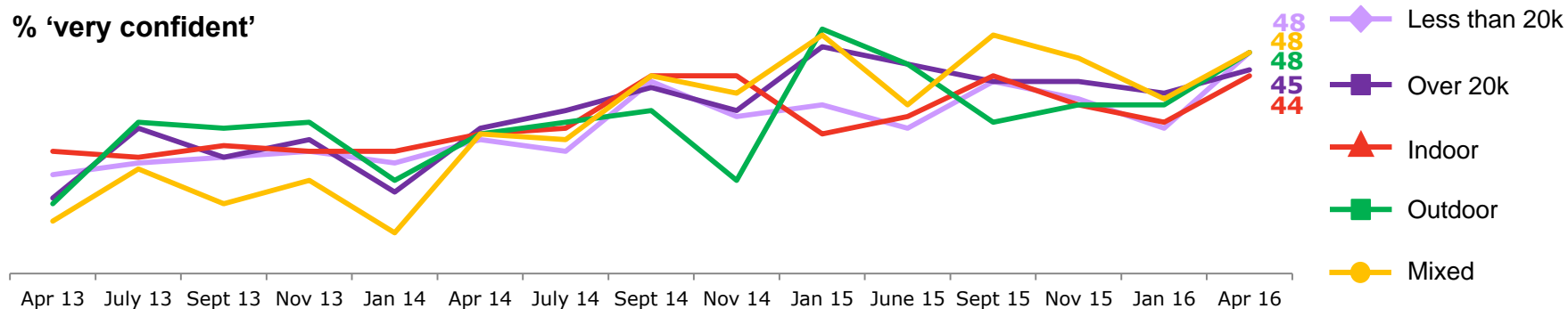
ACCOMMODATION – BY TYPE

% 'very confident'



ATTRACTIONS – BY TYPE

% 'very confident'



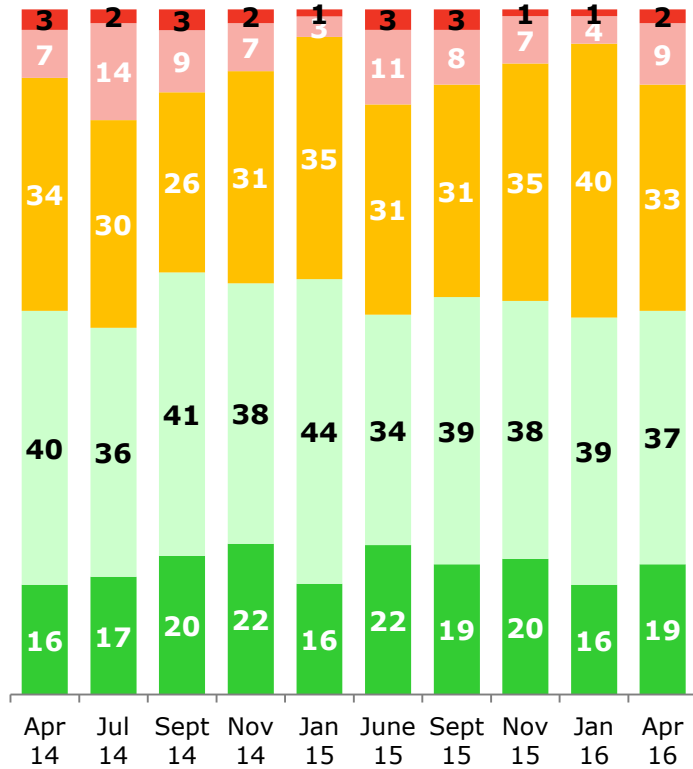
Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	July 2014	Sept 2014	Nov 2014	Jan 2015	June 2015	Sept 2015	Nov 2015	Jan 2016	Apr 2016
Until late Spring/early Summer	Until end of the Summer holidays	Until end of Oct	Until end of the year	Until end of Easter	Until late Spring/early Summer	Until end of school summer holidays	Until end of October	Until end of the year	Until end of Easter	Until end of school summer holidays	Until the end of October	Until end of the year	Until end of Easter	Until late Spring/early Summer

Business optimism for 2016

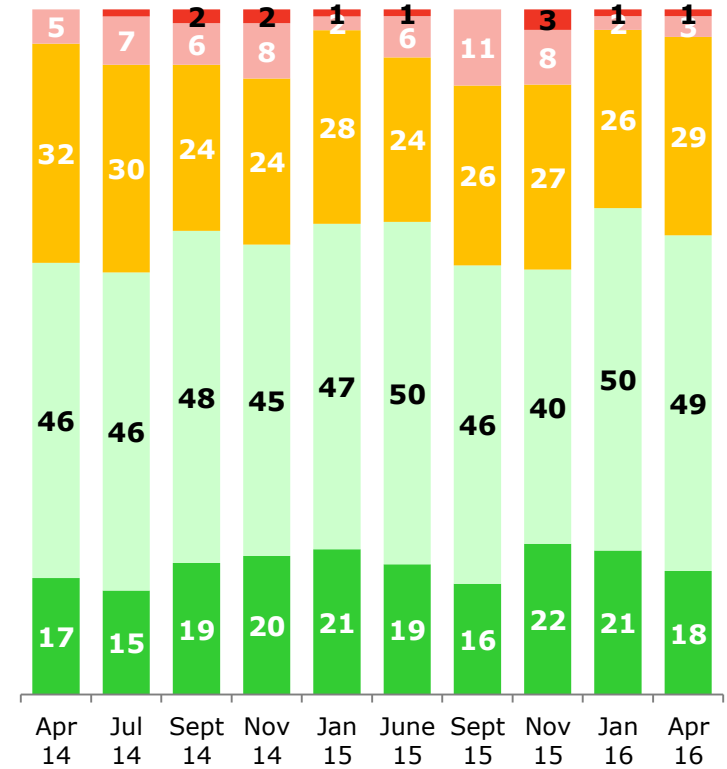
Despite a challenging Easter, optimism amongst accommodation sites is strong, with only 11% of businesses feeling that their business performance will be worse than last year.

Attractions sites remain positive, with the upcoming summer months providing nearly 7 in 10 with an expectation of a stronger business performance than in 2015.

ACCOMMODATION



ATTRACTIONS



Positive verbatim comments on business optimism for 2016:

Accommodation



We have a new extension which will allow for more business

A lot of people are choosing to stay in the UK

Because we have advertised on trip advisor and have received good reviews

If the weather is good the bookings go up

The start to the year that we have had has been a lot stronger in terms of bookings



Positive verbatim comments on business optimism for 2016:

Attractions

“

We are launching our new website

Increased spend on marketing and advertising

*Just because of the number of bookings we have taken for later in the
year*

*We have a new marketing strategy at the moment and we are running
various promotions*

We are working with other local partners to get our name out and about

”



Quality Standards and Other Details

BDRC Continental comply with ISO 20252, the recognised international quality standards for market research, thus the project has been carried out in accordance with these standards.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BDRC Continental, they are briefed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252.

Full methodological details relevant to the project, are available upon request.