Tourism Business Monitor 2017

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 2017:** 24 Apr-2 May, reviewing the Easter period 2017  
**Jan 2017:** 3-11 Jan 2016, reviewing the Christmas and New Year period 2016  
**Jul 2016:** 18-25 Jul 2016, reviewing period after the Easter holidays up until mid-July  
**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
Accommodation businesses report steady growth, consistent with at the start of the year. Attractions have seen an acceleration in their growth with nearly two thirds reporting an increase in visitors and less than a fifth reporting a decline. This is the most positive net result for attractions recorded since September 2014.

Net growth of the domestic market continues, particularly in the attractions sector. The rate of growth has slowed amongst accommodation businesses and is now the same as the level seen in Easter 2016. The overseas market has also grown for, but on a smaller scale, for both business types.

Hotels and campsites fared well over the Easter period, while performance of guest houses and self-catering accommodation remained fairly consistent with the previous year. All attraction types are showing growth so far this year, with a particularly buoyant period over Easter for larger attractions (with over 20k visitors) and attractions with an outdoor offer, reflecting the clement weather.

Accommodation advance bookings are at a slightly higher level then in Easter 2016, but confidence up until early summer remains consistent, with a little over half expecting 2017 to be a better year than 2016.

As we might expect, outdoor attractions are the most confident about their prospects in the run up to the summer holidays. Other types of attraction are more cautious than they were last Easter. However, they are much more bullish about 2017 as a whole, with nearly three-quarters expecting to improve their business performance.

The majority of accommodation sites have kept a consistent workforce compared to the previous year, and will continue to do so going forward. However, almost 1 in 5 are expecting to increase staffing levels before the end of the year.

Reflecting the positive performance over the year to date, a quarter of attractions have increased their workforce, and 17% expect to do so before the end of 2017. Perhaps unsurprisingly, attractions are more open to recruiting unpaid volunteers; 28% had increased this part of their staffing since last year, and nearly a third will look to increase their volunteers by the end of the year.
Business Dashboards
Both types of business saw growth during the Easter period, with the attractions market performing particularly strongly. Satisfaction levels are also strong, with 51% of accommodation and 47% of attractions reporting that they were ‘very satisfied’ with business performance.

**Business Performance Dashboard**

Satisfaction levels are strong, with 51% of accommodation and 47% of attractions reporting that they were ‘very satisfied’ with business performance.

### ACCOMMODATION

**Visitor numbers (%)**

<table>
<thead>
<tr>
<th></th>
<th>Apr 17</th>
<th>YTD 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>20</td>
<td>30</td>
</tr>
<tr>
<td>Same</td>
<td>39</td>
<td>26</td>
</tr>
<tr>
<td>Up</td>
<td>41</td>
<td>44</td>
</tr>
</tbody>
</table>

### ATTRACTIONS

**Visitor numbers (%)**

<table>
<thead>
<tr>
<th></th>
<th>Apr 2017</th>
<th>YTD 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Down</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>Same</td>
<td>63</td>
<td>60</td>
</tr>
<tr>
<td>Up</td>
<td>49</td>
<td>47</td>
</tr>
</tbody>
</table>

**Satisfaction (%)**

<table>
<thead>
<tr>
<th></th>
<th>Apr 17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all</td>
<td>9</td>
</tr>
<tr>
<td>Not very</td>
<td>37</td>
</tr>
<tr>
<td>Quite</td>
<td>51</td>
</tr>
<tr>
<td>Very</td>
<td>49</td>
</tr>
</tbody>
</table>

**Period asked about for past business performance**

April 2017: Easter period 2017

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VisitEngland

Q3/4, Q7/8
Business Confidence Dashboard: Confidence for next period

Looking ahead, an overwhelming majority of all sites (91% of accommodation and 98% of attractions) felt confident about their prospective performance up until early summer.

**ACCOMMODATION**

```
Nov 13  Jan 14  Apr 14  Jul 14  Sept 14  Nov 14  Jan 15  June 15  Sept 15  Nov 15  Jan 16  Apr 16  Jul 16  Jan 17  Apr 17
81  83  90  91  92  87  86  94  93  94  89  92  96  89  91
52  54  52  43  42  45  54  43  41  41  51  47  31  57  46
29  29  38  48  49  42  32  51  51  52  39  46  32  46
```

**ATTRactions**

```
Nov 13  Jan 14  Apr 14  Jul 14  Sept 14  Nov 14  Jan 15  June 15  Sept 15  Nov 15  Jan 16  Apr 16  Jul 16  Jan 17  Apr 17
91  89  98  93  97  92  95  97  96  95  95  96  98  97  98
56  63  64  58  54  55  51  56  53  54  57  50  51  60  58
36  26  34  35  42  37  45  41  43  41  38  46  46  37  40
```

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

Net growth of domestic guests continued over the Easter period, but the rate of growth has slowed and is now the same as the level seen in Easter 2016. The overseas market has also grown, albeit to a lesser extent.
Changing Visitor Profile (year-to-date vs. previous year): Attractions

The domestic market continues to see strong growth, with just 9% of attractions reporting a drop in UK visitors. The overseas market has also seen growth, albeit on a smaller scale.

Period asked about for past business performance:
April 2017: Easter period 2017
Business Performance
Visitor Numbers: Year-on-year changes (up /down)

Accommodation businesses report steady growth, consistent with at the start of the year. Attractions have seen a acceleration in their growth with nearly two thirds reporting an increase in visitors and less than a fifth reporting a decline. This is the most positive net result recorded since September 2014.

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

Hotels and campsites fared well over the Easter period, while performance of guest houses and self-catering accommodation remained fairly consistent with the previous year. All attraction types are showing growth so far this year, with a particularly buoyant period over Easter for larger attractions (with over 20k visitors) and attractions with an outdoor offer, reflecting the clement weather.

ACCOMMODATION - BY TYPE

attraction types are showing growth so far this year, with a particularly buoyant period over Easter for larger attractions (with over 20k visitors) and attractions with an outdoor offer, reflecting the clement weather.

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
April 2017: The Easter period 2017
Changing business performance: By business type (trends)

The boost in visitor numbers at caravan/campsites over the Easter period has led to an all-time high satisfaction score (with 70% stating they were ‘very satisfied’). Similarly, the strong performance of hotels has also had a knock-on effect on satisfaction levels. Indoor attractions reported the lowest levels of growth for the Easter period, with satisfaction also falling as a result.

ACCOMMODATION – BY TYPE
% Visitors up on last year

ATTRACTIONS – BY TYPE
% Visitors up on last year

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
April 2017: The Easter period 2017
Workforce
Accommodation employment changes: Paid employees

The majority of sites have kept a consistent workforce compared to the previous year, and will continue to do so going forward. However, almost 1 in 5 are expecting to increase staffing levels before the end of the year.

VS. PREVIOUS YEAR

<table>
<thead>
<tr>
<th>Decreased</th>
<th>Stayed the same</th>
<th>Increased</th>
<th>DK/can't say</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>74</td>
<td>15</td>
<td>4</td>
</tr>
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</table>

LOOKING FORWARD TO THE REST OF 2017 (EXPECTED)

<table>
<thead>
<tr>
<th>Decrease</th>
<th>Stay the same</th>
<th>Increase</th>
<th>Too early to say</th>
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</thead>
<tbody>
<tr>
<td>3</td>
<td>67</td>
<td>19</td>
<td>11</td>
</tr>
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</table>
Attractions employment changes: Paid employees

Reflecting the positive performance this year, a quarter of attractions have increased their workforce, and 17% expect to do so before the end of the year.

VS. PREVIOUS YEAR

<table>
<thead>
<tr>
<th>Decreased</th>
<th>Stayed the same</th>
<th>Increased</th>
<th>DK/can't say</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>64</td>
<td>25</td>
<td>5</td>
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LOOKING FORWARD TO THE REST OF 2017 (EXPECTED)

<table>
<thead>
<tr>
<th>Decrease</th>
<th>Stay the same</th>
<th>Increase</th>
<th>Too early to say</th>
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<tbody>
<tr>
<td>3</td>
<td>74</td>
<td>17</td>
<td>6</td>
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**Attractions employment changes: Unpaid volunteers**

Perhaps unsurprisingly, attractions have been more open to recruiting unpaid volunteers. 28% had increased this part of their staffing since last year, and nearly a third will look to increase their volunteers by the end of the year.

**VS. PREVIOUS YEAR**

```
<table>
<thead>
<tr>
<th>Decreased</th>
<th>Stayed the same</th>
<th>Increased</th>
<th>DK/can't say</th>
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</thead>
<tbody>
<tr>
<td>5</td>
<td>48</td>
<td>28</td>
<td>19</td>
</tr>
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**LOOKING FORWARD TO THE REST OF 2017 (EXPECTED)**

```
<table>
<thead>
<tr>
<th>Decrease</th>
<th>Stay the same</th>
<th>Increase</th>
<th>Too early to say</th>
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<tbody>
<tr>
<td>1</td>
<td>51</td>
<td>32</td>
<td>16</td>
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```
Business Confidence
Advance booking levels: Accommodation

Advance bookings are at a slightly higher level than in Easter 2016, with 44% of sites describing them as ‘good’ and 30% as ‘very good’.

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</tr>
</thead>
<tbody>
<tr>
<td>Period asked about:</td>
<td>Until end of the year</td>
<td>Until the end of Easter</td>
<td>Until late Spring/ early Summer</td>
<td>Until end of school summer holidays</td>
<td>Until the end of October</td>
<td>Until the end of the year</td>
<td>Until the end of school summer holidays</td>
<td>Until the end of October</td>
<td>Until the end of the year</td>
<td>Until the end of Easter</td>
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<td>Until the end of school summer holidays</td>
<td>Until the end of Easter</td>
<td>Until late Spring/ early Summer</td>
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- **Very good**: 14% in Nov 2013, 15% in Jan 2014, 6% in Apr 2014, 6% in Jul 2014, 6% in Sept 2014, 6% in Nov 2014, 6% in Jan 2015, 6% in June 2015, 6% in Sept 2015, 6% in Nov 2015, 6% in Jan 2016, 6% in Apr 2016, 6% in Jul 2016, 6% in Jan 2017, 6% in Apr 2017.
Confidence in performance for forthcoming period: By business type

This increase in advance booking levels has had a positive impact on business confidence across all types of accommodation. As we might expect, outdoor attractions are the most confident about their prospects over the summer period. Other types of attraction are more cautious than they were last Easter.

ACCOMMODATION – BY TYPE
% ‘very confident’

ATTRACTIONS – BY TYPE
% ‘very confident’
Business optimism for 2017

Business confidence amongst accommodation sites remains at a similar level to Easter 2016, with over half expecting 2017 to be a better year than 2016. Attractions are much more bullish, with nearly three-quarters expecting to improve their business performance.
Positive verbatim comments on business optimism for 2017: Accommodation

“

We’re increasing our capacity

Because of the level of forward bookings we have at this stage is higher than last year

We're already up on what we were doing last year and we’re booked solidly until the end of July

Plans for new restaurant to open

Getting busier by the day

”
Positive verbatim comments on business optimism for 2017: Attractions

“

As we’re making a sustained effort with digital marketing, I’m confident that more people will visit.

People prefer to spend holidays here rather than abroad with the exchange rate.

We continue to offer a more diverse range of things to do.

Based on latest trends there has always an increase every year so hoping to keep up the trend.

”
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.