

Tourism Business Monitor 2015

Wave 2 – Easter up until the end of May



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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:

June 2015: 1-5 June 2015, reviewing the 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

Jan 2013: 7-13 Jan 2013, reviewing Christmas and New Year period 2012

The accommodation and attractions markets have continued to expand since the start of the year, with approaching half of accommodation businesses and over half of attractions reporting increases in visitor numbers.

Over half of all types of attractions reported increases in visitor numbers. There is more variation in the performance of different types of accommodation business, with Hotels once again most likely to report growth.

The increase in visitor numbers was driven more by domestic than overseas visitors for both accommodation businesses and attractions.

At a market level, both types of tourism business were happy with their recent visitor numbers, with around 90% saying they were satisfied with their business performance during Easter up until the end of May.

Looking ahead until the end of the school summer holidays, confidence levels are strong, with almost all businesses feeling 'confident'. Accommodation businesses are particularly bullish, with over half being 'very confident', associated with strong advance bookings. Confidence amongst self-catering businesses has recovered after feelings of uncertainty at the start of the year.

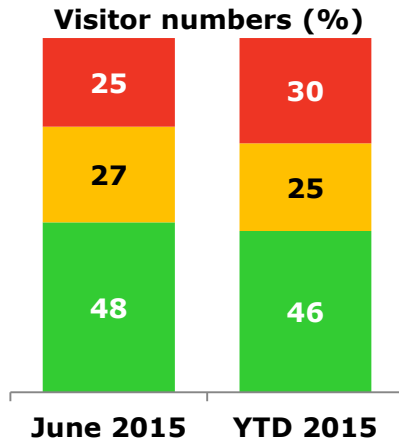
Attractions are more optimistic for the remainder of 2015 than accommodation businesses.

Business Dashboards



Business Performance Dashboard

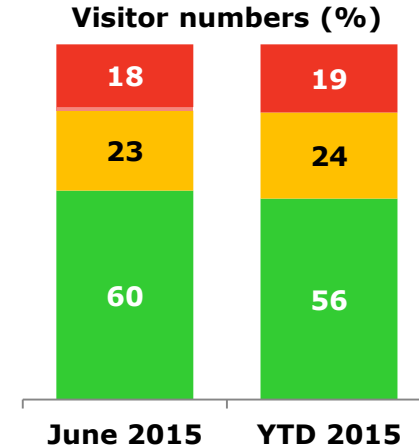
ACCOMMODATION



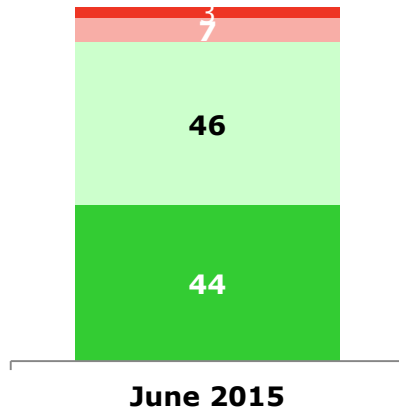
Versus same period previous year...

- Down
- Same
- Up

ATTRACTIONS



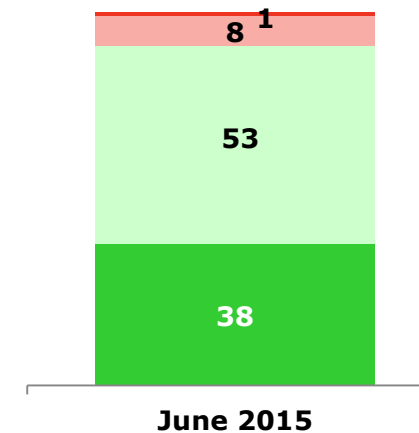
Satisfaction (%)



Satisfied with business performance...

- Not at all
- Not very
- Quite
- Very

Satisfaction (%)



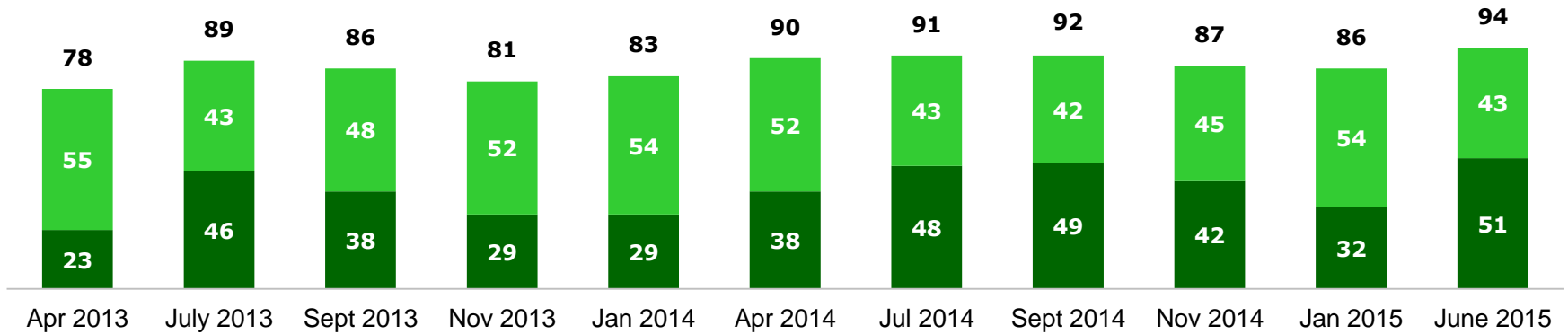
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
 June 2015: Easter up until the end of May

Business Confidence Dashboard: confidence for next period

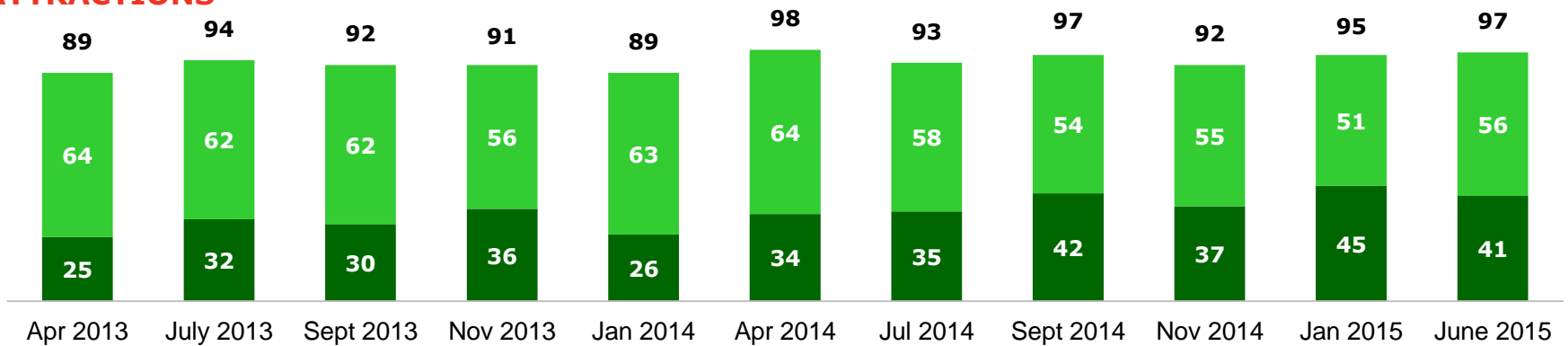
Almost all attractions and accommodation businesses feel confident about the summer period, but accommodation businesses are somewhat more bullish, with 51% (vs. 41%) feeling 'very confident'.

ACCOMMODATION

Very confident Fairly confident



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	Until the end of the school summer holidays
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Visitor Profile



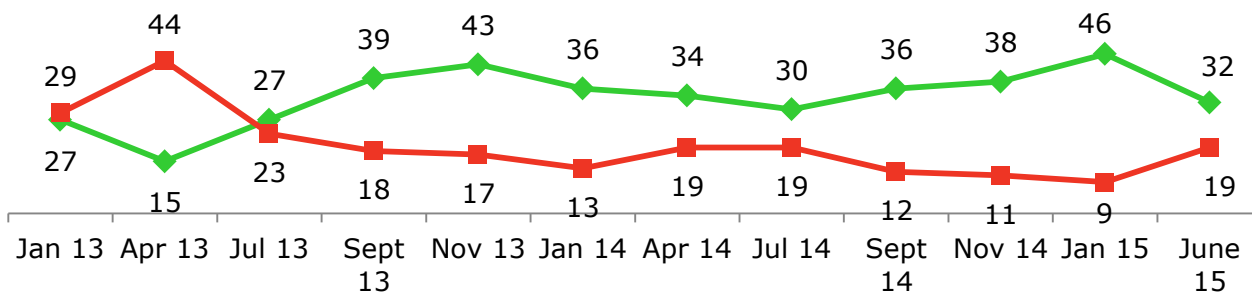
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

◆ Up ■ Down

NET:
Up - Down



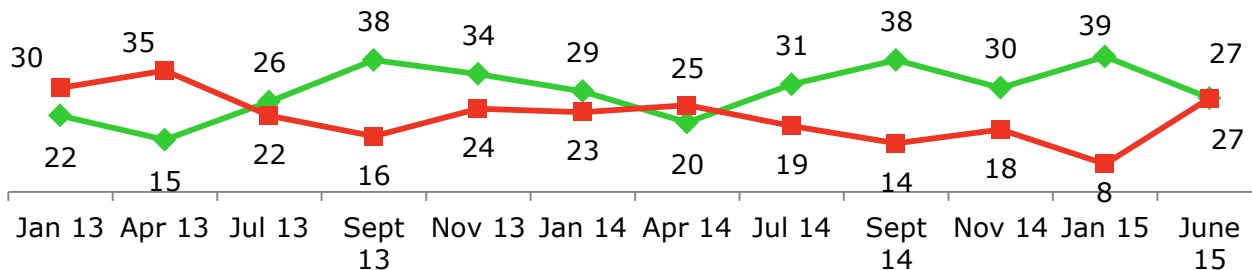
Domestic visitors



+13



Overseas visitors



0

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
June 2015: From January up until the end of May

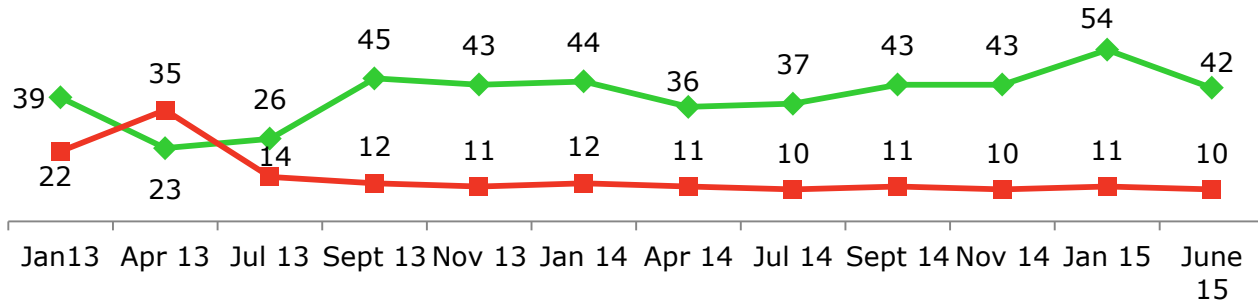
Changing Visitor Profile (year-to-date vs. previous year): Attractions



**NET:
Up - Down**



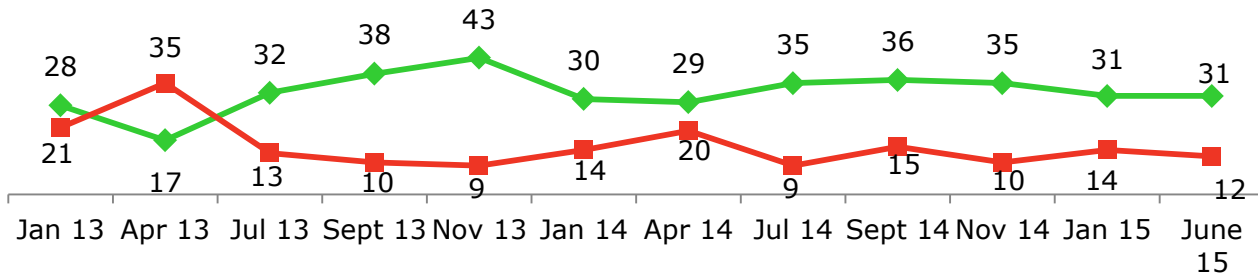
**Domestic
visitors**



+32



**Overseas
visitors**



+19

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
June 2015: From January up until the end of May

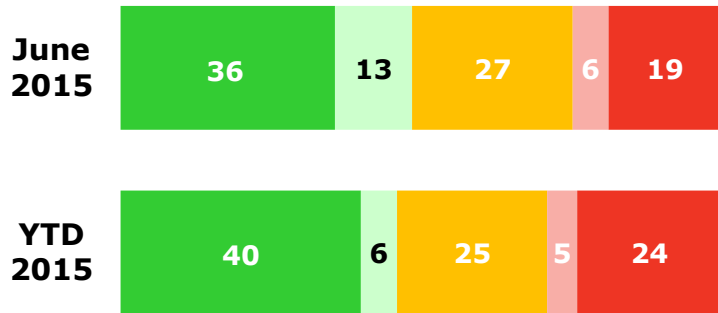
Business Performance



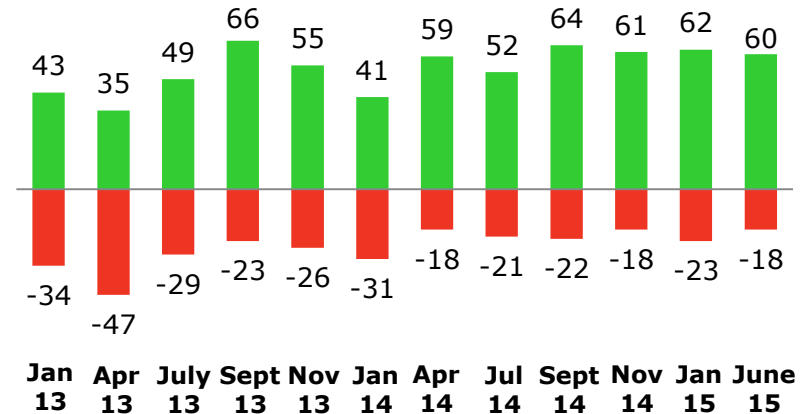
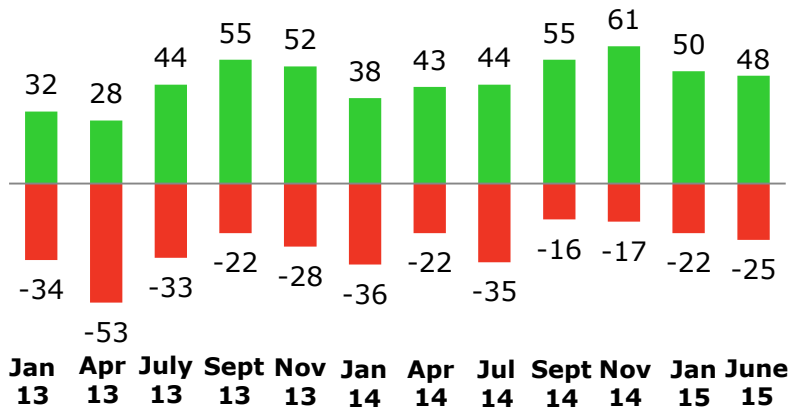
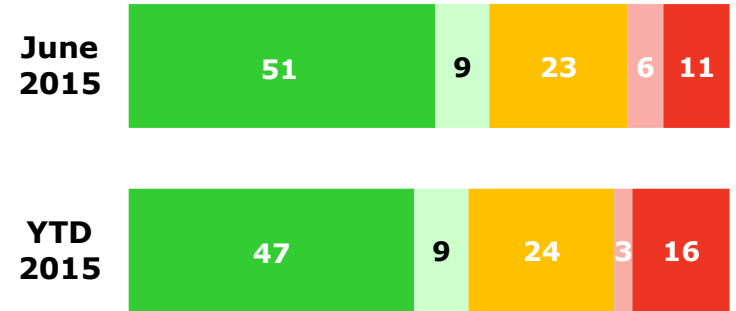
Visitor Numbers: Year-on-year changes (up /down)

The accommodation and attractions markets have continued to expand since the start of the year, with approaching half of accommodation businesses and over half of attractions reporting increases in visitor numbers. The proportion of attractions (18%) reporting a decline in visitors is at its lowest since Jan 2013; however a quarter of accommodation businesses are still reporting a drop in visitor numbers.

% ACCOMMODATION



% ATTRACTIONS



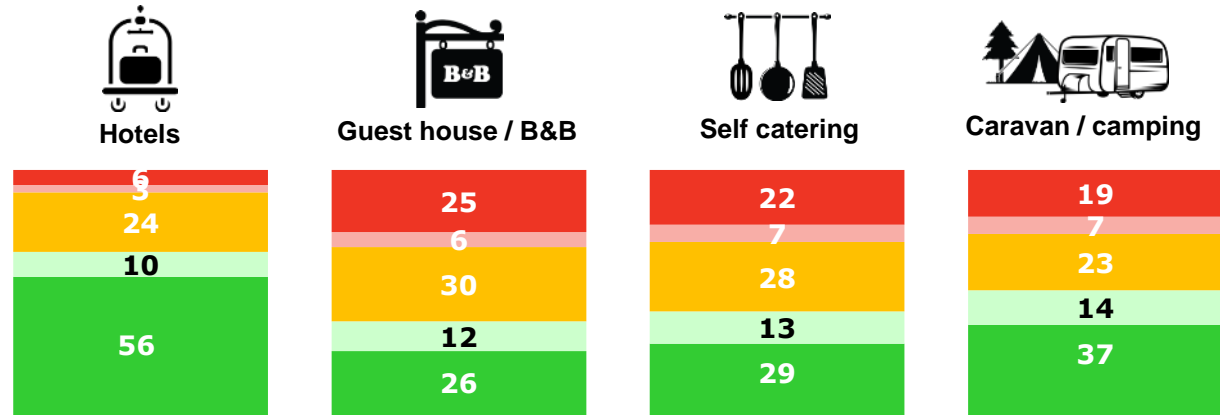
PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

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 up until the end of the summer holidays / **Nov:** Mid-September until the end of October

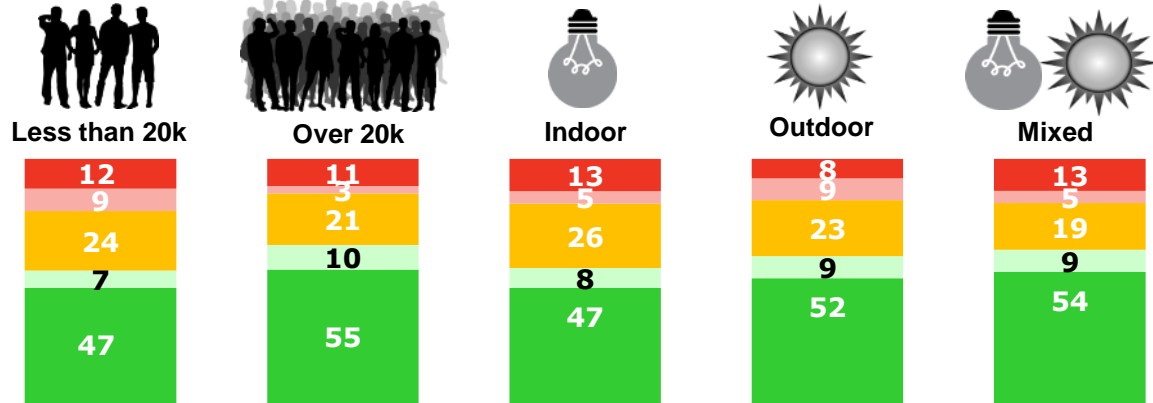
Changing business performance: By business type

There is a great deal of consistency in recent business performance across different types of attractions. However, Hotels out-performed other business types, with a particularly successful April/ May.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE



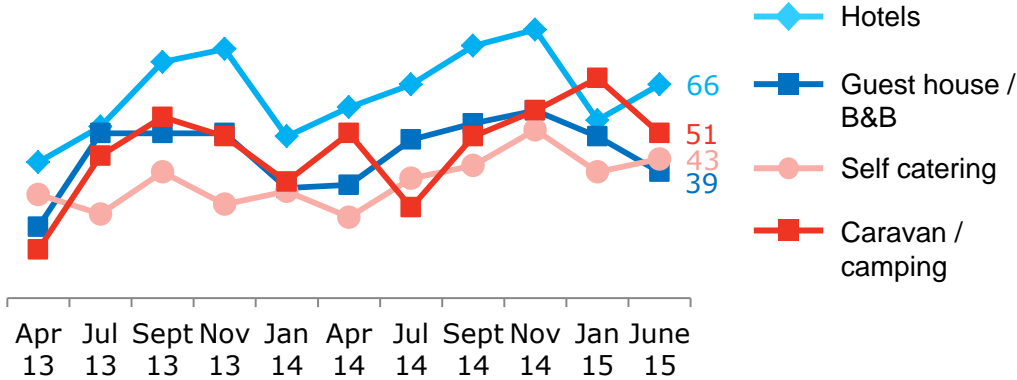
PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
 June: Easter up until the end of May

Changing business performance: By business type (trends)

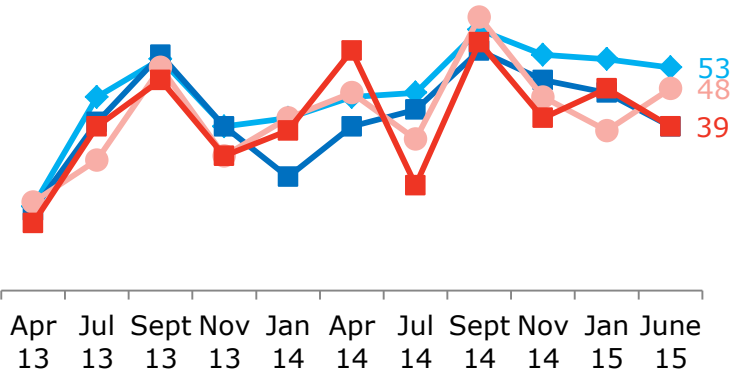
Overall, the attractions market has performed consistently well over the last year, with over half all types of attractions reporting increases in visitor numbers. There is more variation in the performance of different types of accommodation business, with Hotels once again most likely to report growth.

ACCOMMODATION – BY TYPE

% Visitors up on last year

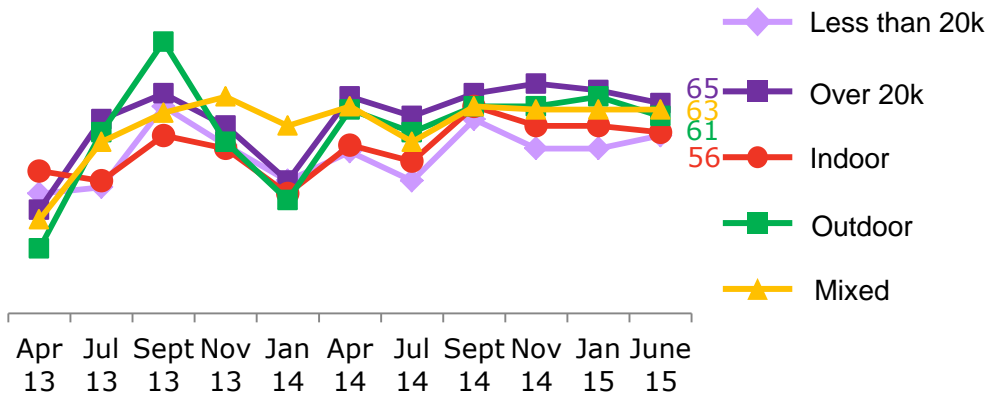


% Very Satisfied

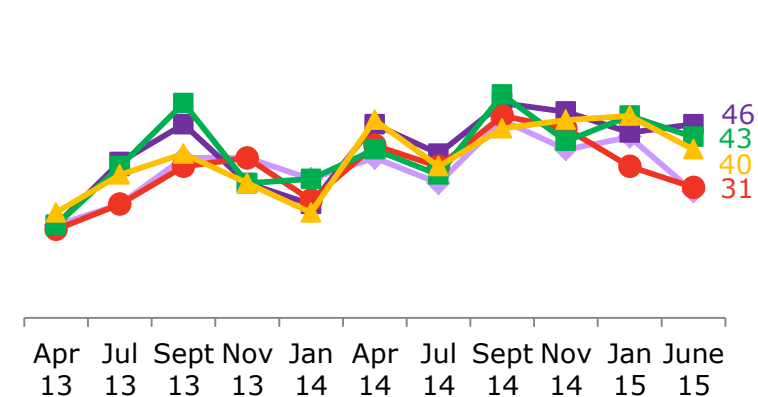


ATTRACTIONS – BY TYPE

% Visitors up on last year



% Very Satisfied

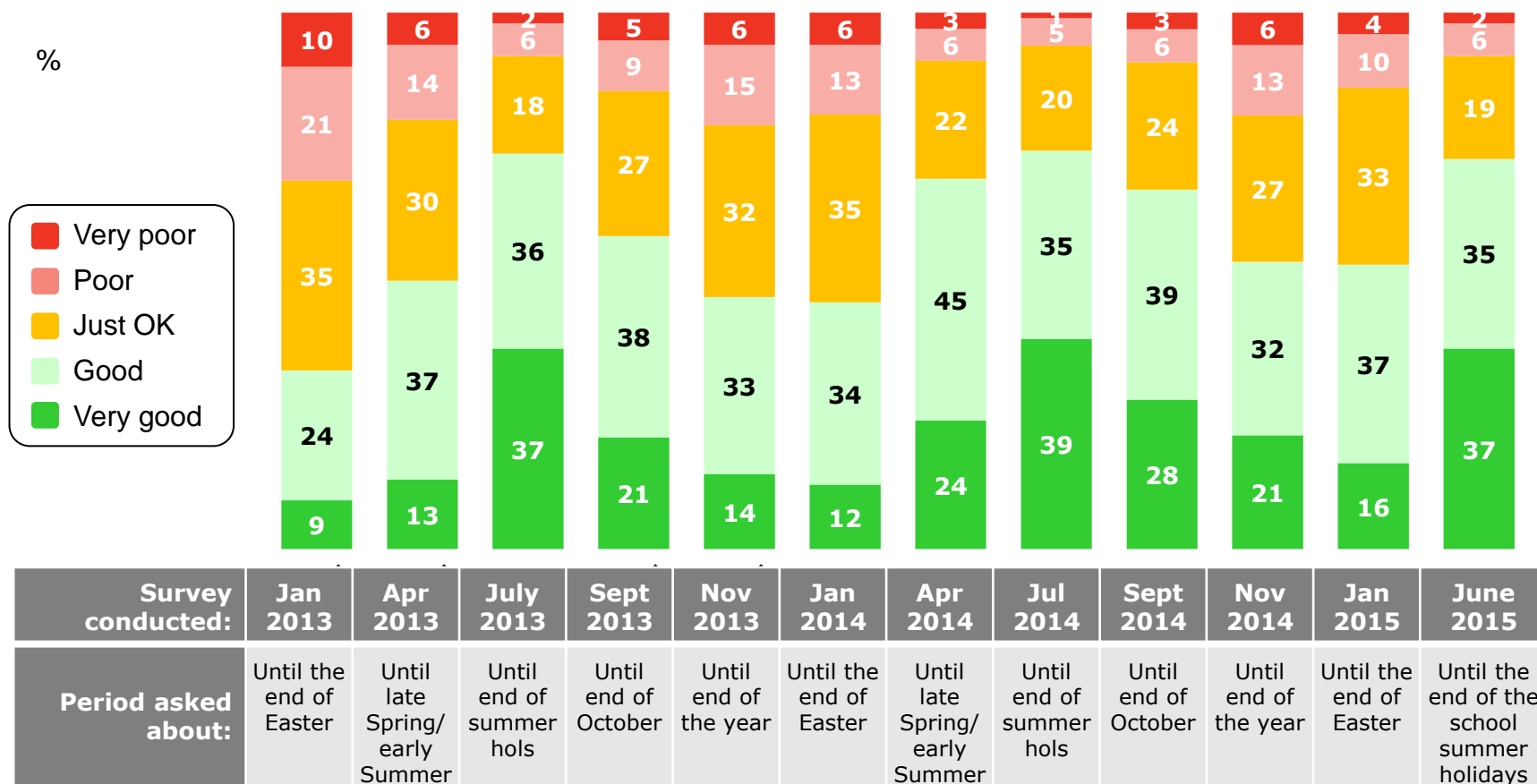


Business Confidence



Advance booking levels: Accommodation

Looking ahead until the end of the school summer holidays, accommodation businesses have experienced an increase in advance bookings – almost matching levels reported last July (which was one month closer to school summer holidays than this research).

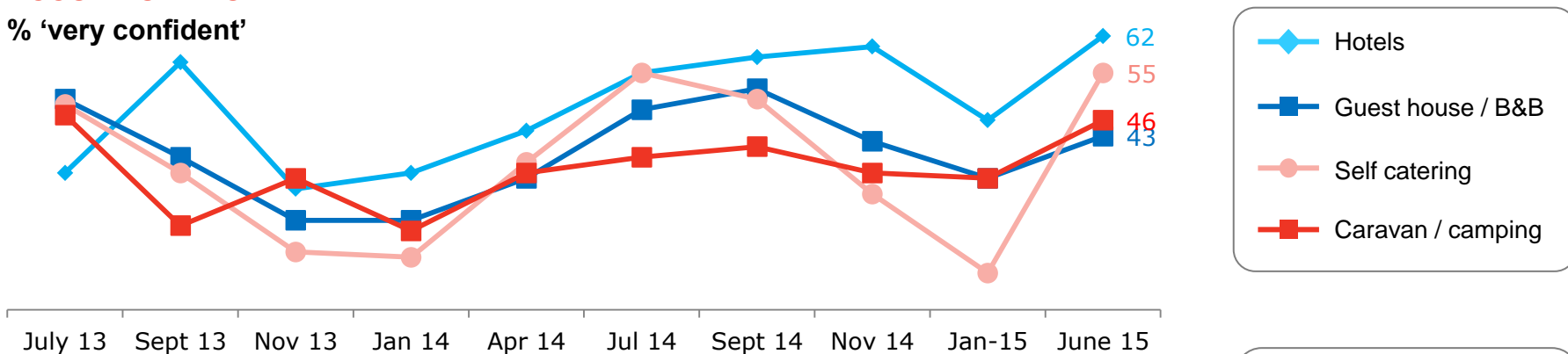


Confidence in performance for forthcoming period: By business type

After a wobble in confidence levels at the start of the year, accommodation businesses are now feeling more bullish about their prospects to the end of the school holidays, with a strengthening in confidence amongst Self-catering businesses and hotels in particular. In contrast, most types of attractions are slightly less confident than they were in January.

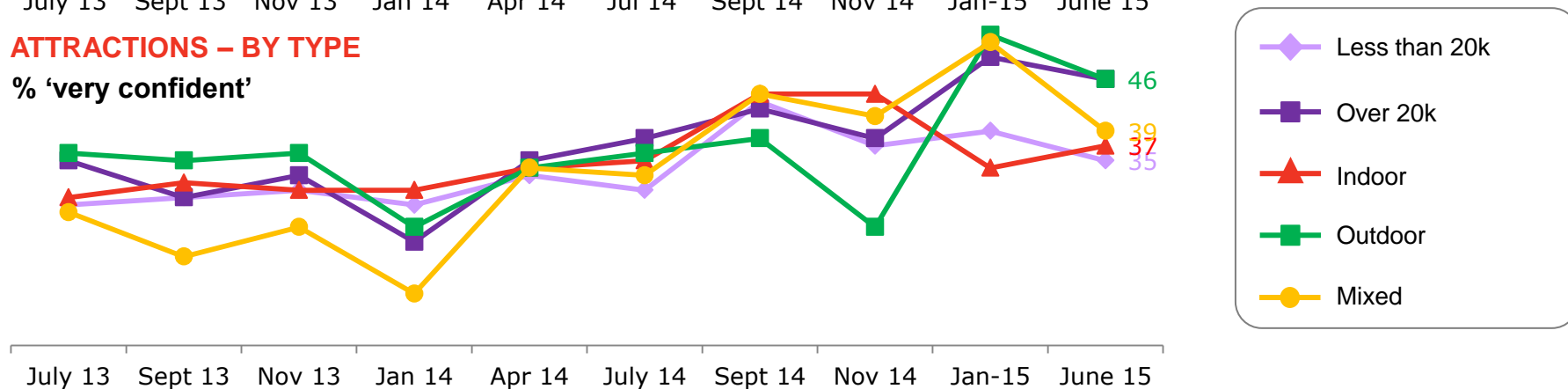
ACCOMMODATION – BY TYPE

% 'very confident'



ATTRACTIONS – BY TYPE

% 'very confident'



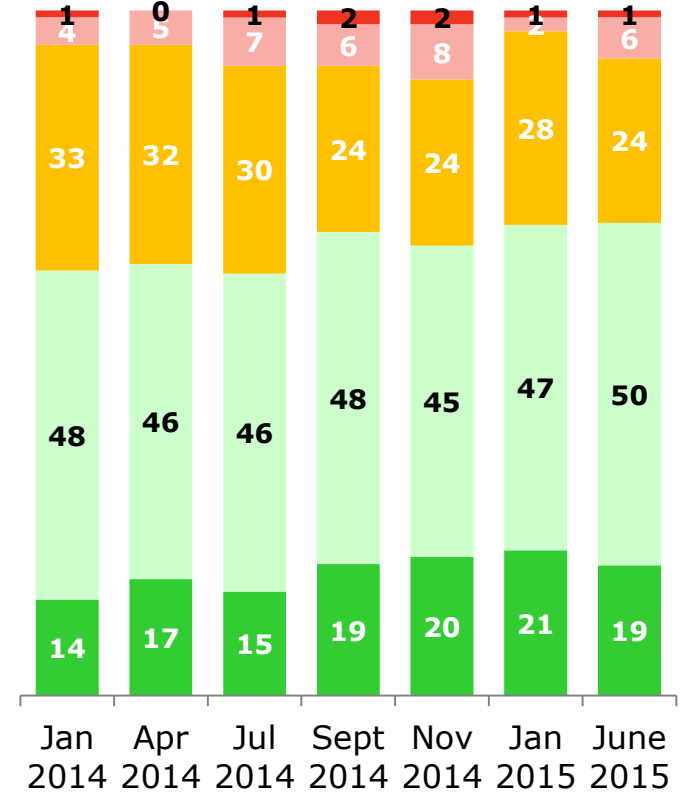
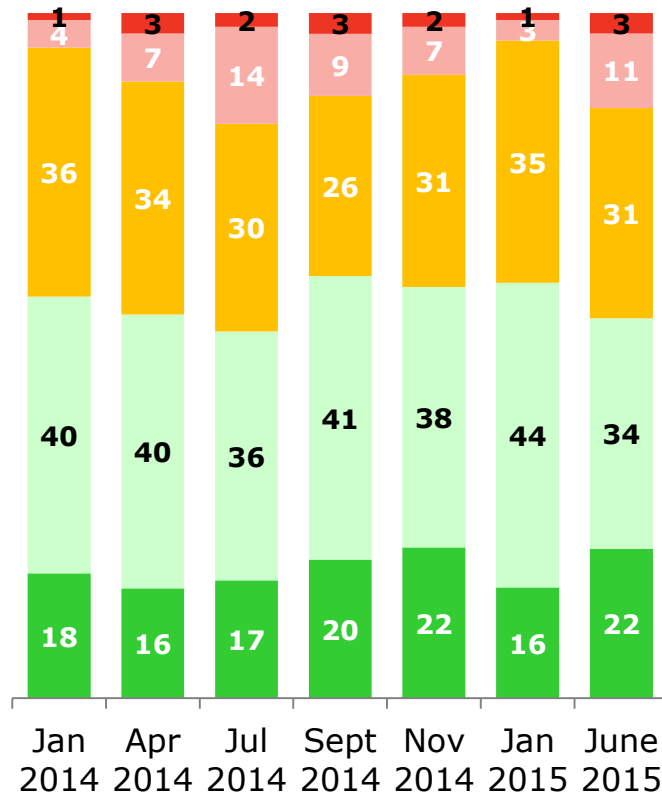
July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	July 2014	Sept 2014	Nov 2014	Jan 2015	June 2015
Until end of the Summer holidays	Until end of October	Until end of the year	Until end of Easter	Until late Spring/early Summer	Until end of school summer holidays	Until end of October	Until end of the year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

Business optimism for 2015

Attractions are more confident in their ability to generate growth throughout the rest of the year than accommodation businesses.

ACCOMMODATION

ATTRACTIONS



Positive verbatim comments on business optimism for 2015:

Accommodation



We are improving yearly and obviously we have more existing and regular guests coming back to us.

Because I have already got a lot of bookings I did not have last year.

Simply due to the larger number of clients and I think we're offering better facilities than we have in the past it will lead to repeat guest rather than one-time guest.

Because the economy is improving. We've got more corporate demands.

Because I've increased my marketing and paid for Trip Advisor adverts.

Bookings are up because we've mapped review site to your system.



Positive verbatim comments on business optimism for 2015:

Attractions



Because we are getting better known. People are making more of an effort to visit.

We have just been very busy since the exhibition. We are also getting lots of repeat visitors.

It's because the individual spend is higher.

I think our profile has been raised so more visitors and few financial cuts which has made it easier.

We have new management and we are improving the visitor offer.

Because we have maximised on the things people like. We are having a big camp in July and are fully booked for this event.

We are open 363 days in a year. Previously we were not open so many days.

Doing extra marketing.

We are making arrangements for group visits.



