

Tourism Business Monitor 2015

Wave 3 – End of May until the end of the school 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.

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 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

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

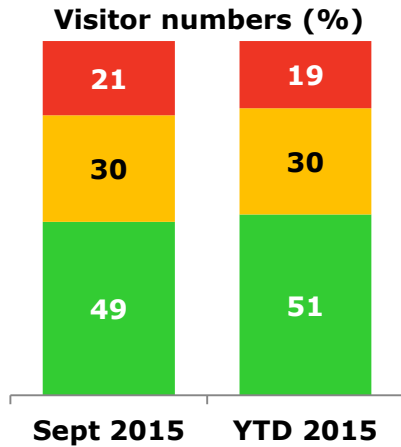
- Building on a positive start to the year, the accommodation and attractions sectors continue to expand, with half of all sites reporting increases in visitor numbers. This growth has come from both domestic and overseas markets.
- Growth is reported across all types of attraction and accommodation businesses. As usual, hotels are the type of accommodation most likely to have reported growth. Mixed and indoor attractions benefited from being the dry/ safe option for visitors, benefiting from a summer of variable weather. The rain clearly dampened performance amongst Outdoor attractions: they are the least likely to have reported improvement in visitor numbers and saw a slowing of growth compared with earlier in the year.
- Accommodation advance bookings remain healthy and are exceeding booking levels from previous years. This has given all types of accommodation assurance about the period running up to the end of October.
- Attractions also feel confident about the forthcoming period. However, confidence amongst Outdoor attractions is at its lowest point this year, no doubt due to the poor weather over the summer.
- Optimism for the end of 2015 has remained positive, with around 3 in 5 attractions and accommodation businesses indicating they think this year will be an improvement on 2014's performance. However, this has fallen back slightly from earlier in the year for attractions.

Business Dashboards



Business Performance Dashboard

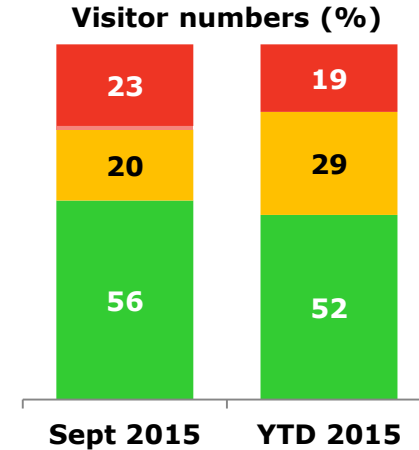
ACCOMMODATION



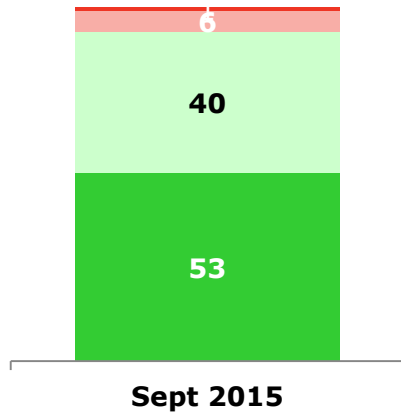
Versus same period previous year...

- Down
- Same
- Up

ATTRACTIONS



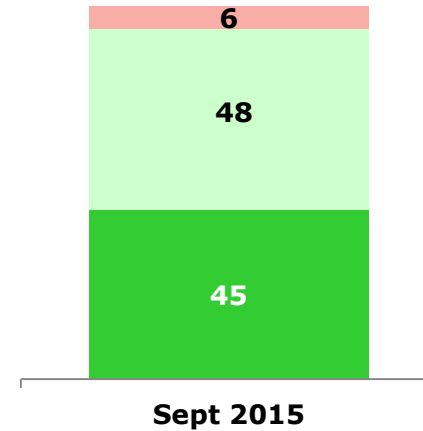
Satisfaction (%)



Satisfied with business performance...

- Not at all
- Not very
- Quite
- Very

Satisfaction (%)



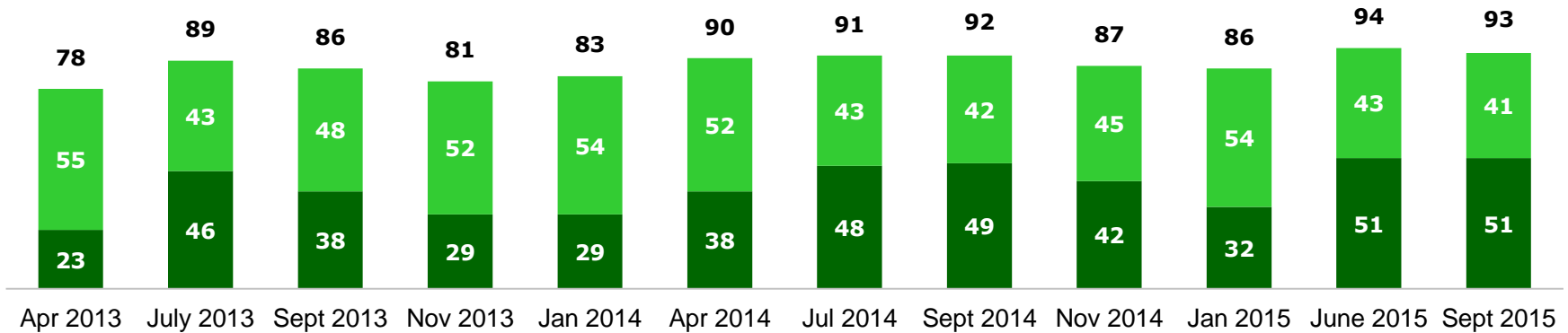
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
 Sept 2015: End of May until the end of the school summer holidays

Business Confidence Dashboard: confidence for next period

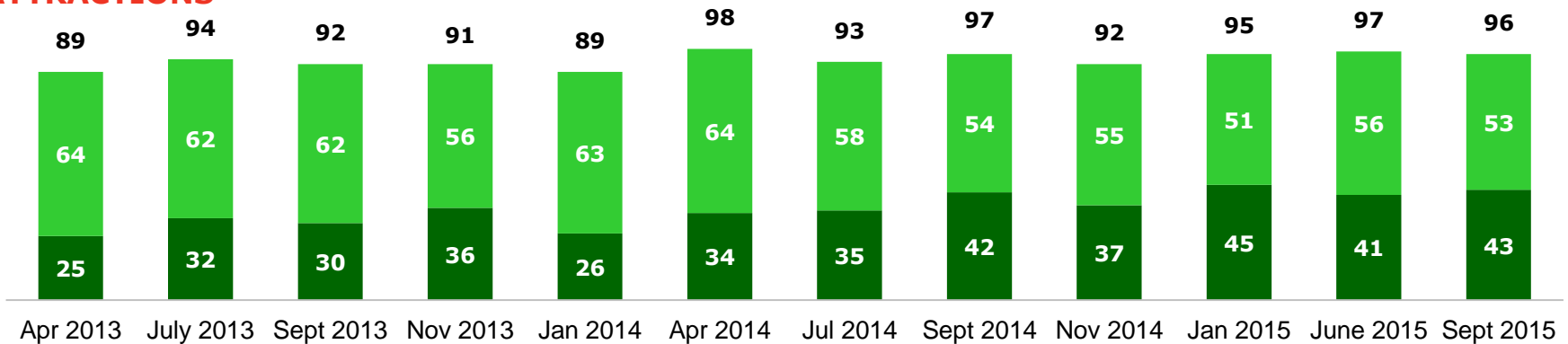
Almost all sites feel positive about the autumn period, but accommodation businesses are slightly more upbeat, with 51% (vs. 43%) feeling 'very confident'.

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	Until end of October
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Visitor Profile



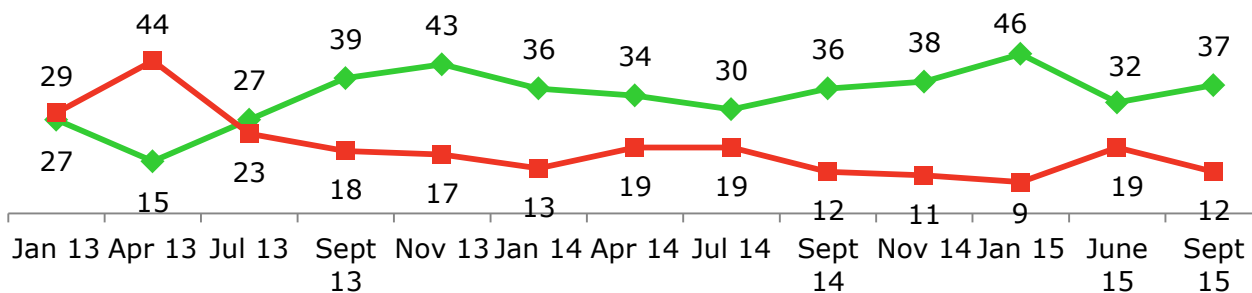
Changing Visitor Profile (year-to-date vs. previous year): Accommodation



**NET:
Up - Down**



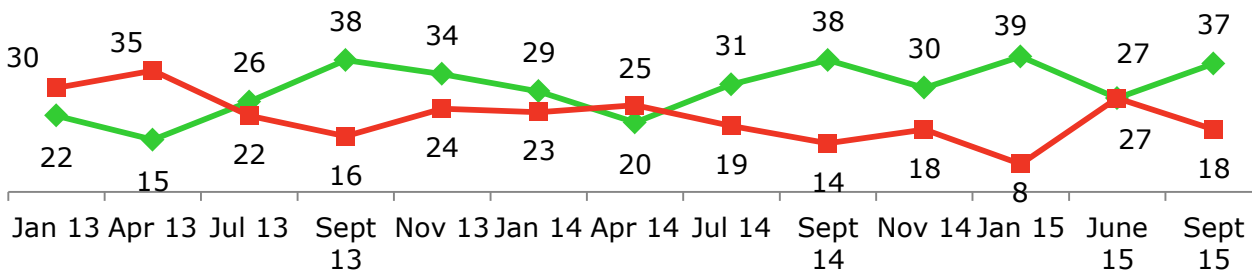
Domestic visitors



+25



Overseas visitors



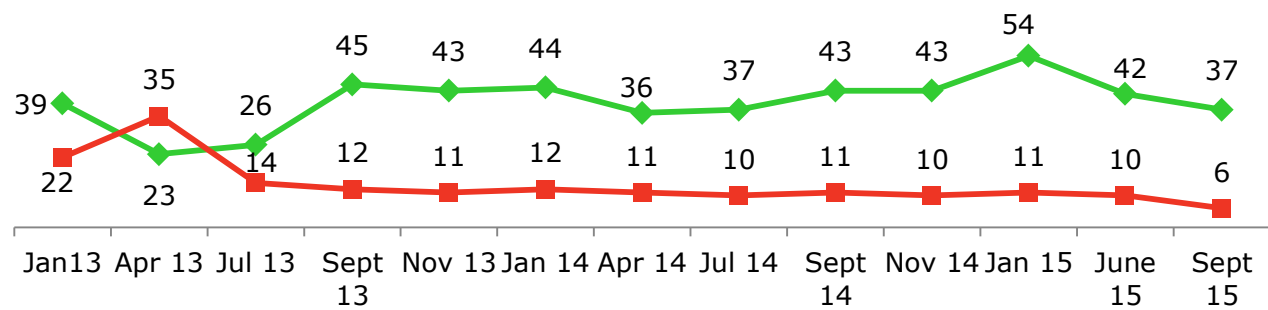
+19

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2015: From January up until the end of the school summer holidays

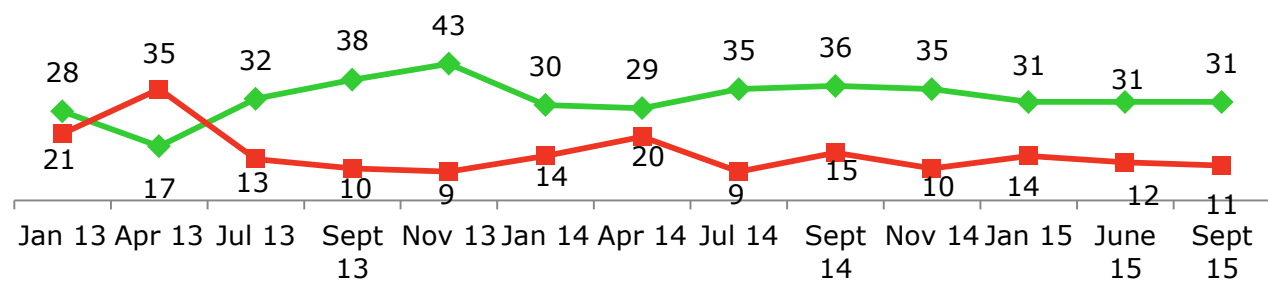
Changing Visitor Profile (year-to-date vs. previous year): Attractions



**NET:
Up - Down**



+31



+20

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2015: From January up until the end of the school summer holidays

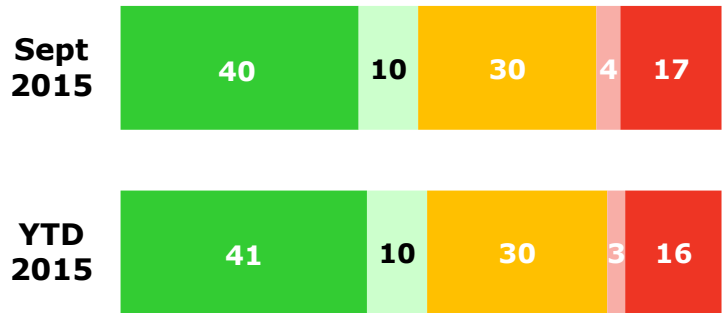
Business Performance



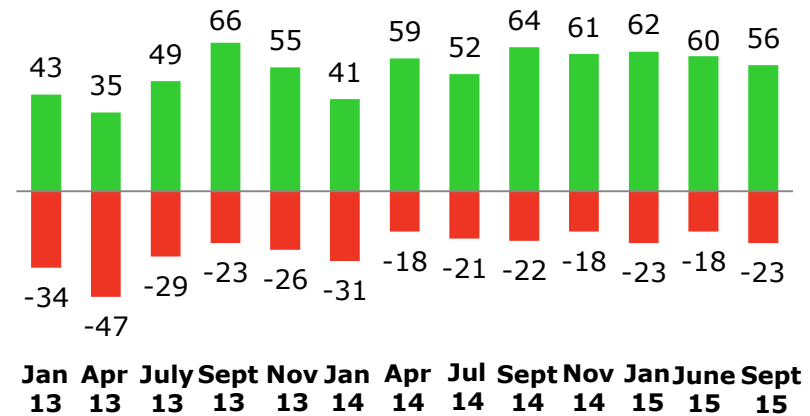
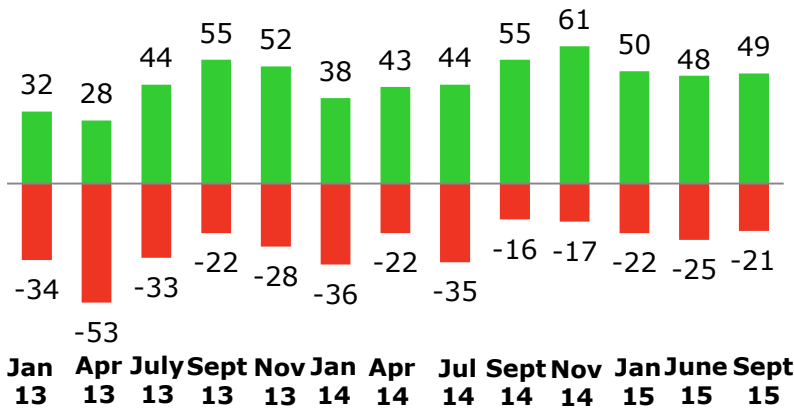
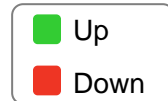
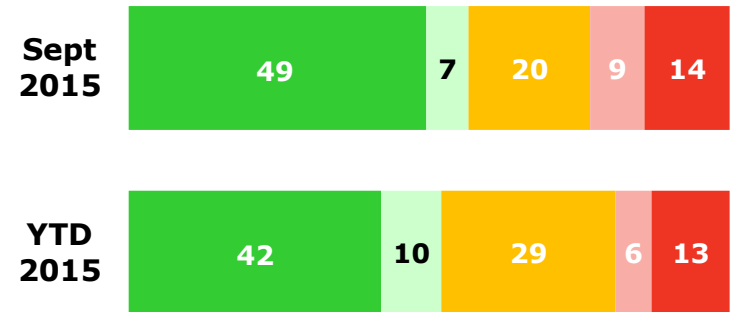
Visitor Numbers: Year-on-year changes (up /down)

Building on a positive start to the year, the accommodation and attractions sectors continue to expand, with half of all sites reporting increases in visitor numbers.

% ACCOMMODATION



% ATTRACTIONS



PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

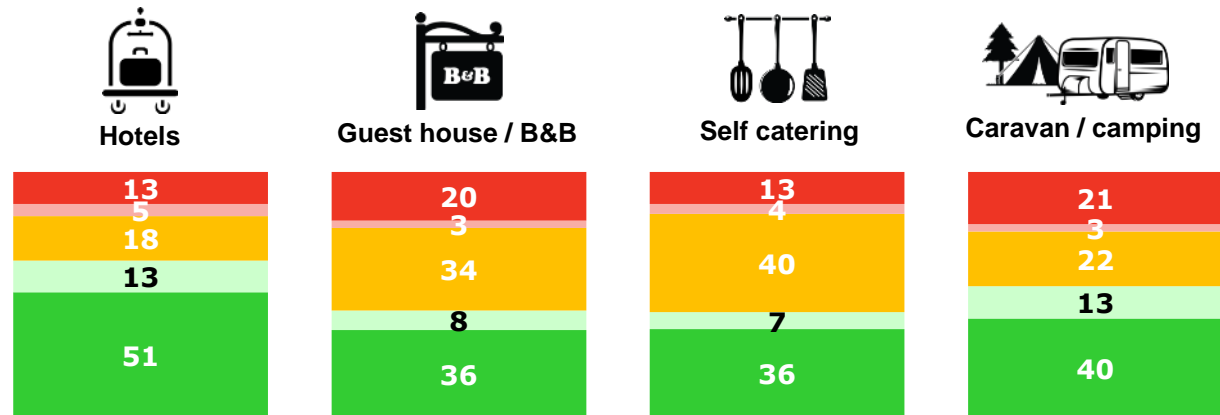
Jan: Christmas and New Year period / **Apr:** Easter period / **June:** Easter up until the end of May / **Jul:** After Easter holidays up until mid-July / **Sept:** Mid-July/End of May (Sept 2015) up until the end of the summer holidays / **Nov:** Mid-September until the end of October

Changing business performance: By business type

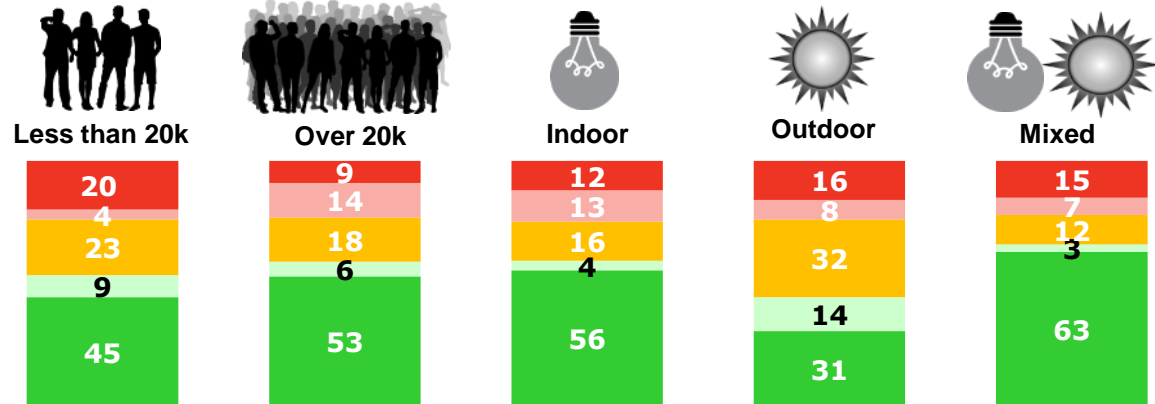
Growth is reported across all types of attraction and accommodation businesses. However, the wet summer dampened growth amongst Outdoor attractions.

As usual, hotels are the type of accommodation most likely to have reported growth. Mixed and indoor attractions benefited from being the dry/ safe option for visitors this summer.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE

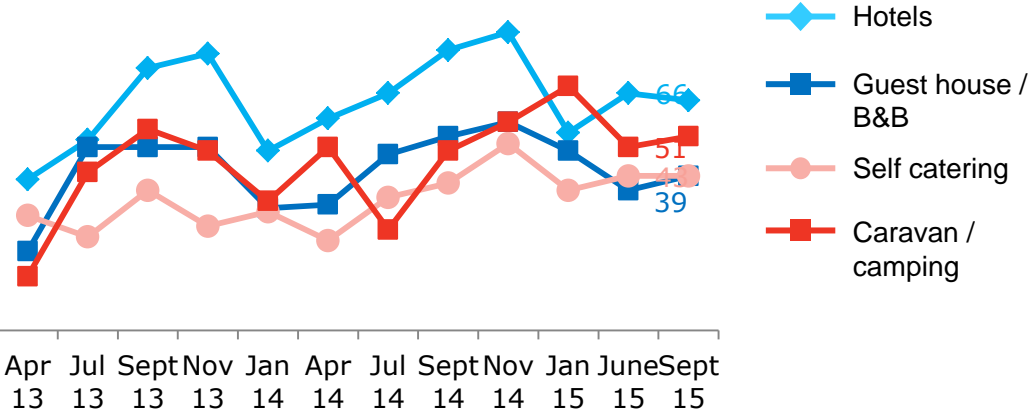


Changing business performance: By business type (trends)

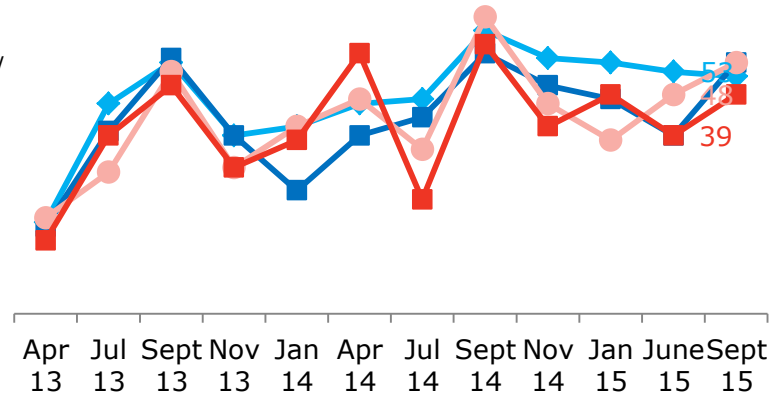
The wet summer clearly had an impact on the performance of Outdoor attractions: they are the least likely to have reported improvement in visitor numbers and saw a slowing of growth compared with earlier in the year.

Reported growth remained steady amongst all types of accommodation business.

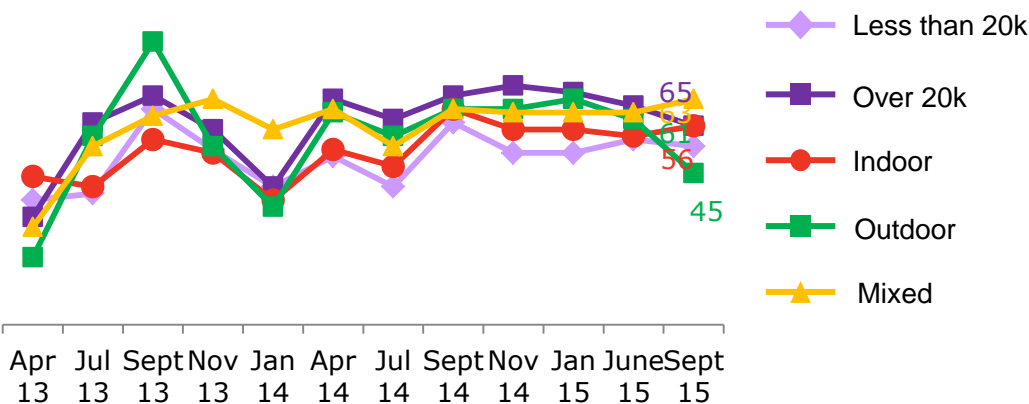
ACCOMMODATION – BY TYPE % Visitors up on last year



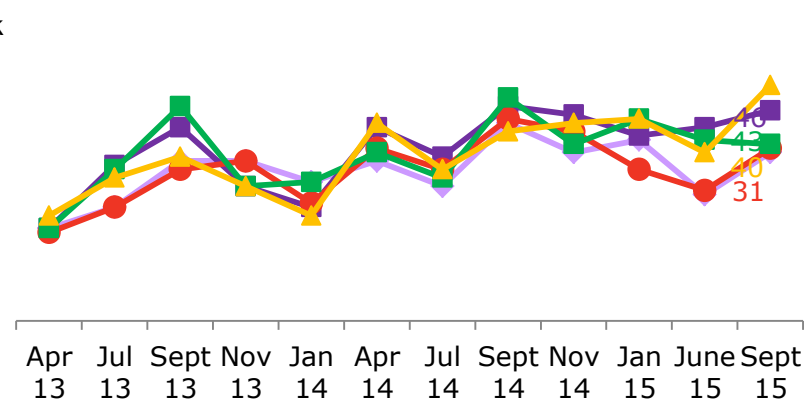
% Very Satisfied



ATTRACTIONS – BY TYPE % Visitors up on last year



% Very Satisfied

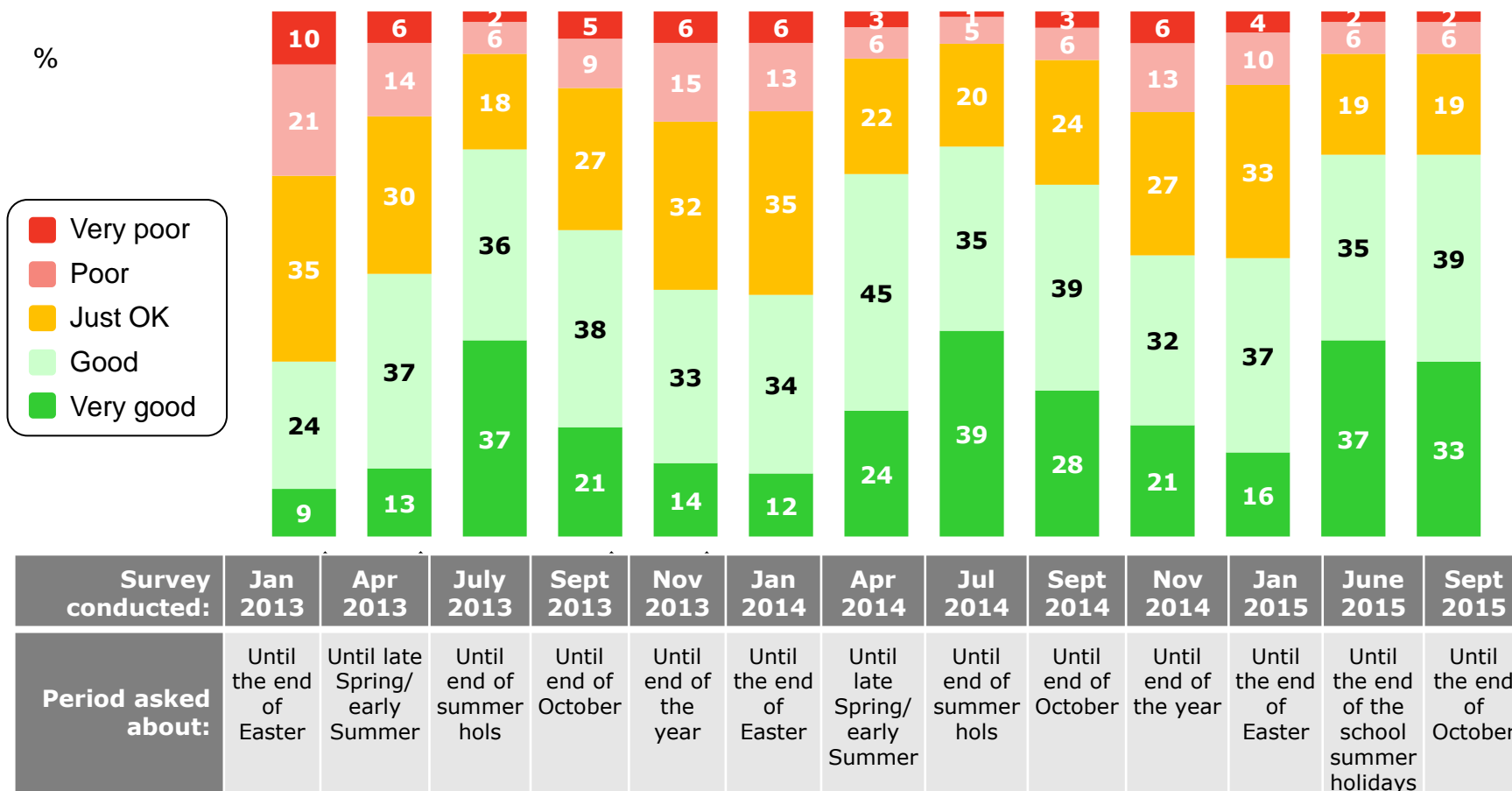


Business Confidence



Advance booking levels: Accommodation

Advance bookings remain healthy and are exceeding booking levels from previous years.



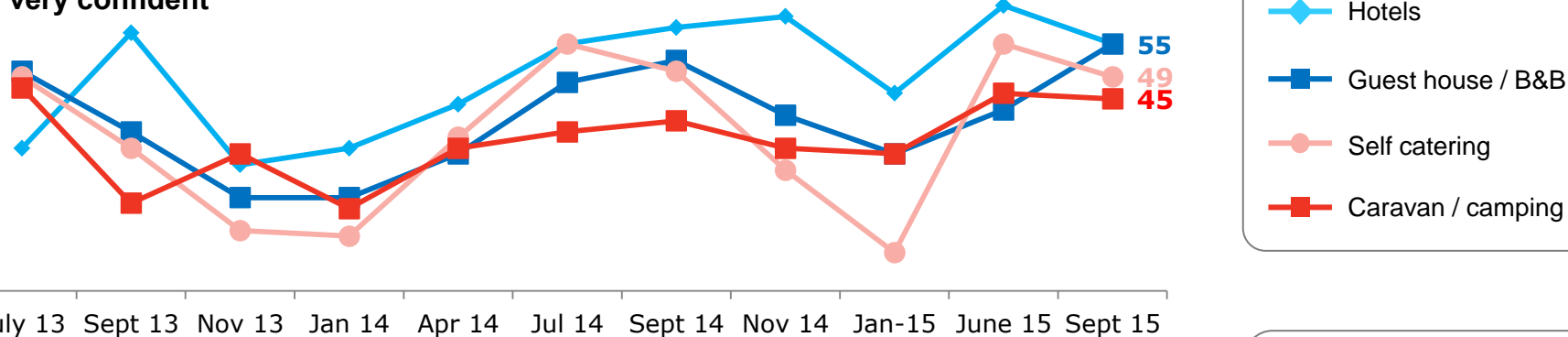
Confidence in performance for forthcoming period: By business type

Business confidence for the forthcoming period is in line with last year for all types of attractions. However, confidence amongst Outdoor attractions is at its lowest point this year, no doubt due to the poor weather over the summer.

Healthy advance bookings have given all types of accommodation business confidence for the forthcoming period.

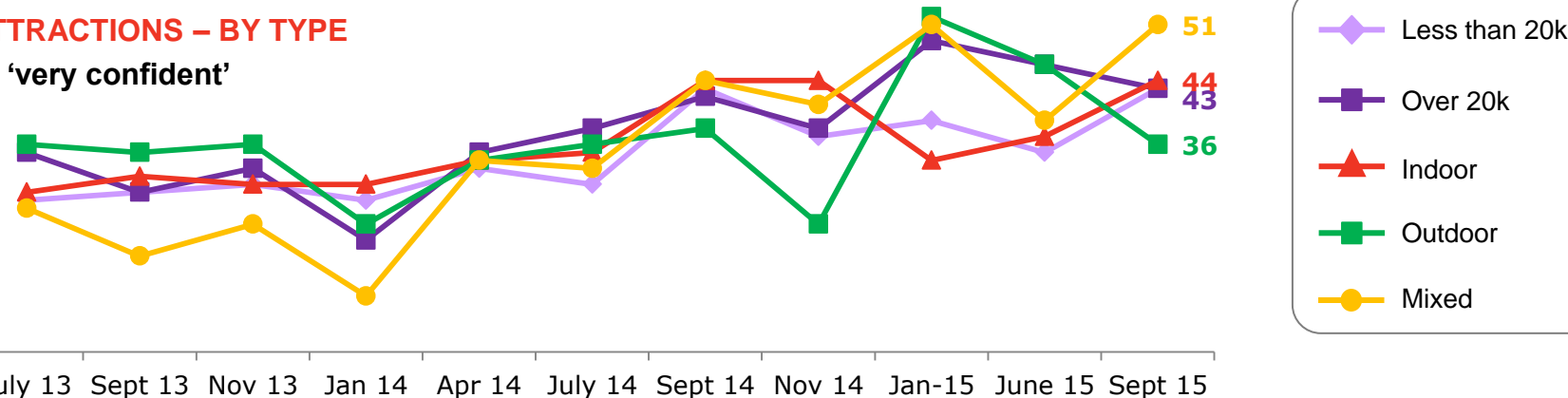
ACCOMMODATION – BY TYPE

% 'very confident'



ATTRACTIONS – BY TYPE

% 'very confident'



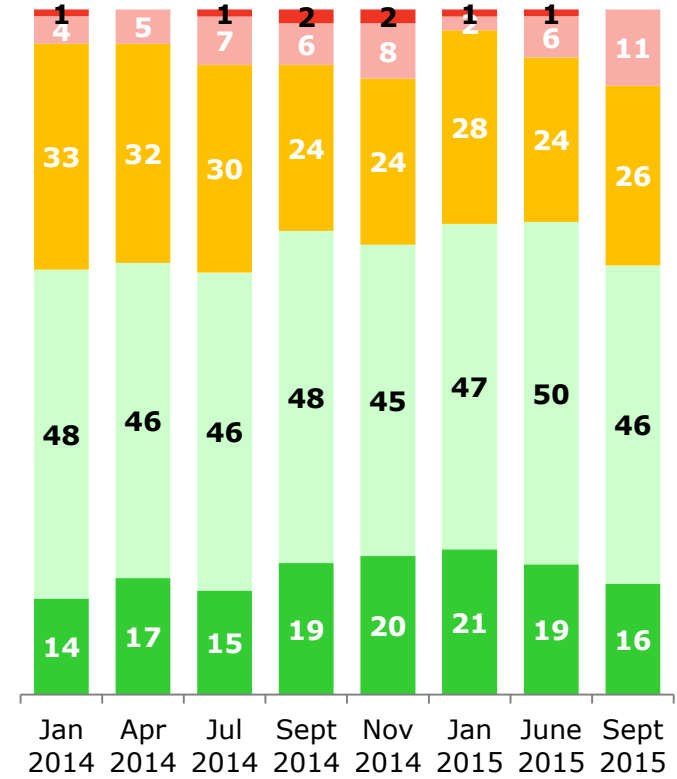
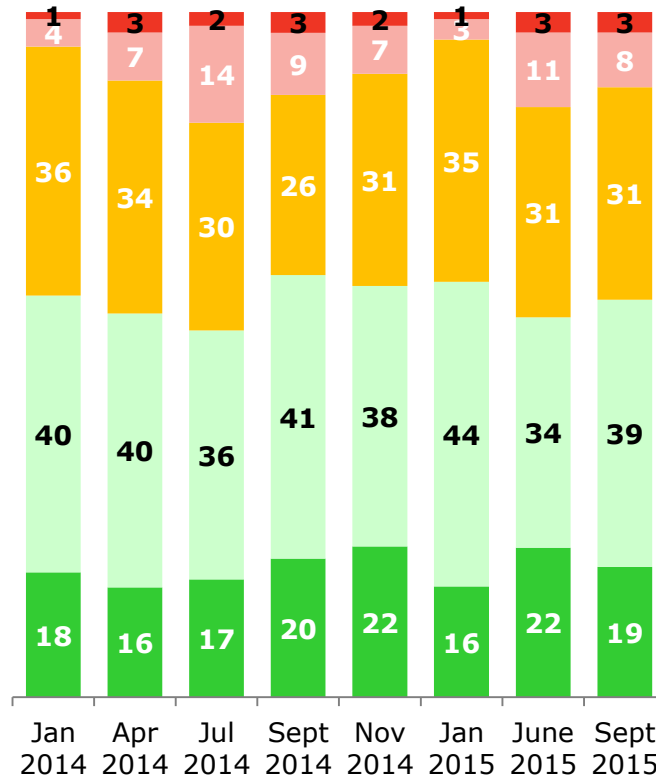
July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	July 2014	Sept 2014	Nov 2014	Jan 2015	June 2015	Sept 2015
Until end of the Summer holidays	Until end of Oct	Until end of the year	Until end of Easter	Until late Spring/early Summer	Until end of school summer holidays	Until end of October	Until end of the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

Business optimism for 2015

Optimism for the end of 2015 has remained positive, with around 3 in 5 attractions and accommodation businesses indicating they think this year will be an improvement on 2014's performance. However, this has fallen back slightly from earlier in the year for attractions.

ACCOMMODATION

ATTRACTIONS



Positive verbatim comments on business optimism for 2015:

Accommodation



Pre bookings have soared

We're going to put more into advertising

Much improved since going through booking.com

We are generally a bit more on the ball in regards to marketing

Constantly growing our customer base due to customer retention

The business is more established now



Positive verbatim comments on business optimism for 2015:

Attractions



Because we have got promotional materials together and lots of plans for the future

Visitor figures are up, and been up generally all year so hopefully this continues

We have spent a bit more on advertising so we expect more visitors

The Rugby World Cup is coming, so we have a lot of events taking place starting at the end of this week

Our range of attractions has increased and we are seeing a good public response

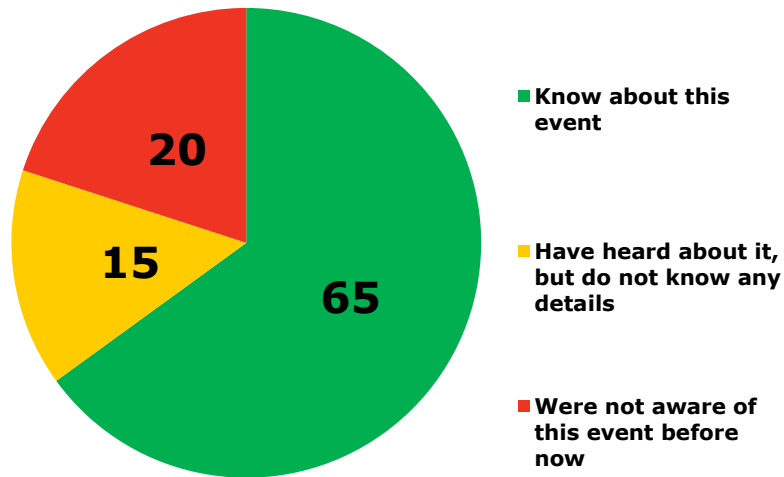
We have just had a refurbishment



Rugby World Cup 2015: Awareness

Responses show widespread awareness amongst businesses, with 80% of all respondents stating that they knew about the tournament in some capacity. This figure grows to 90% when looking at respondents who were based in an area near one or more Rugby World Cup events.

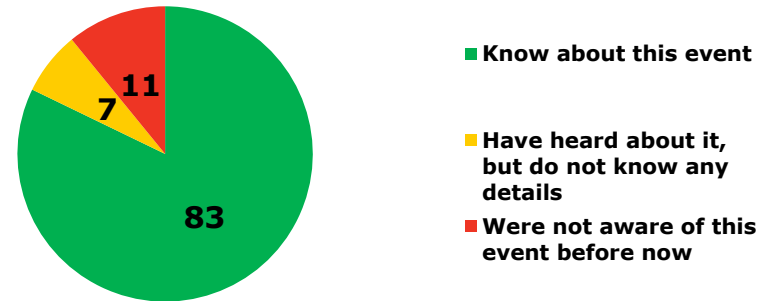
All respondents (%)



November 2014 results

Know about this event	Have heard about it, but do not know any details	Were not aware of this event before now
37	28	35

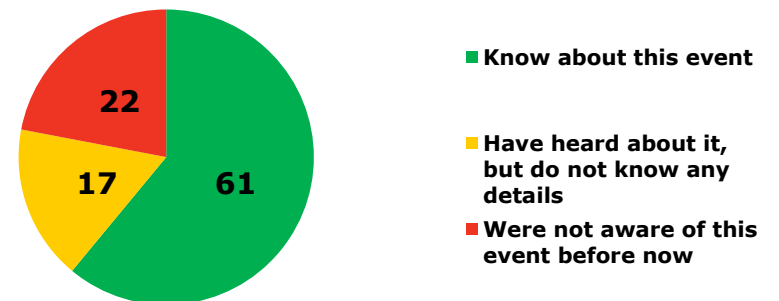
Respondents in a RWC area (%)



November 2014 results

50	24	26
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Respondents in a non-RWC area (%)



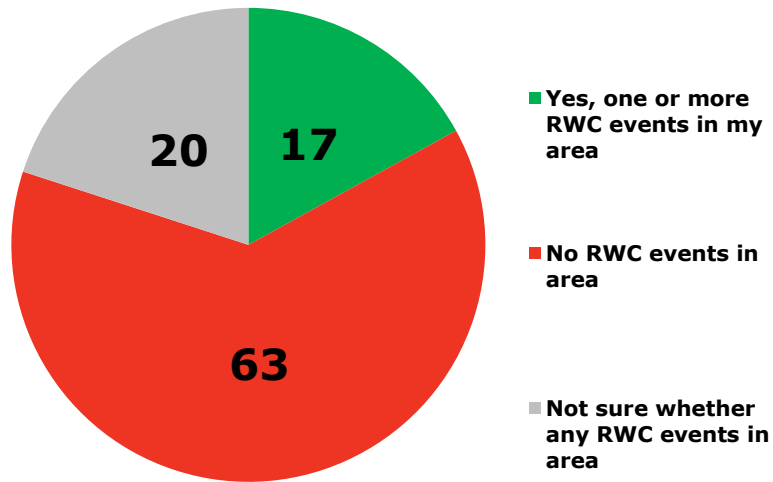
November 2014 results

35	29	36
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Rugby World Cup 2015: Events in area

Overall, only 17% had any knowledge of an event taking place in their area. This figure increases to 40% when looking at businesses that are in a Rugby World Cup area, although the large proportion of 'don't knows' could mean that this figure is higher in reality.

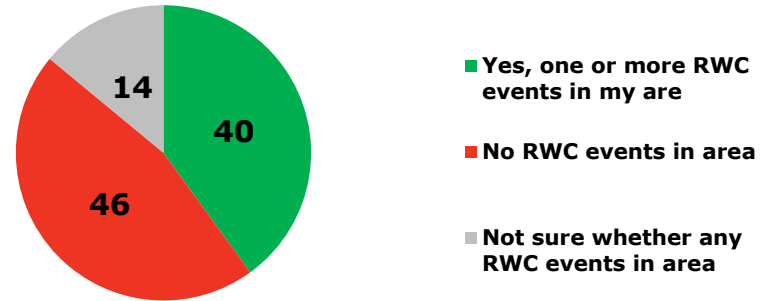
All respondents (%)



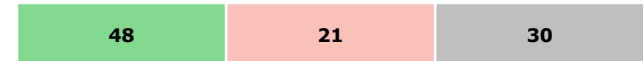
November 2014 results

Yes, one or more RWC events in my area	No RWC events in area	Not sure whether any RWC events in area
21	35	44

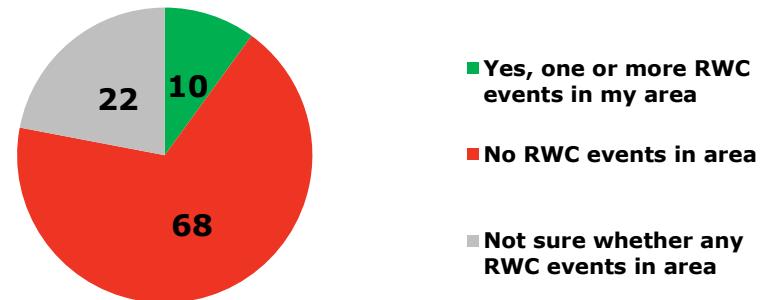
Respondents in a RWC area (%)



November 2014 results



Respondents in a non-RWC area (%)



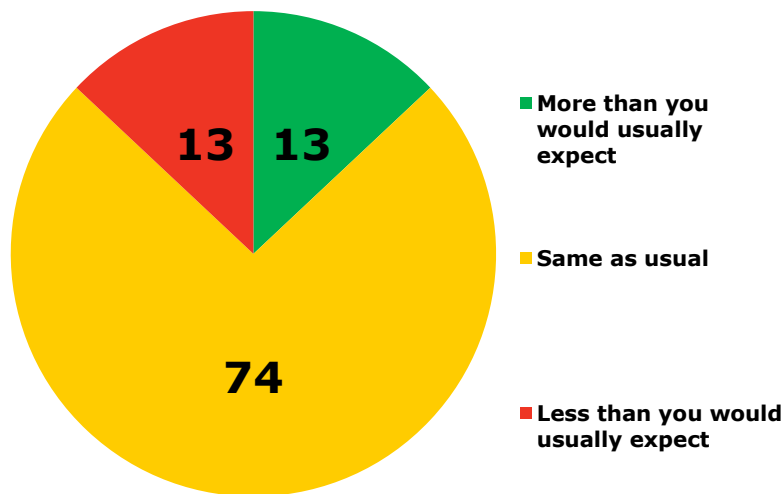
November 2014 results



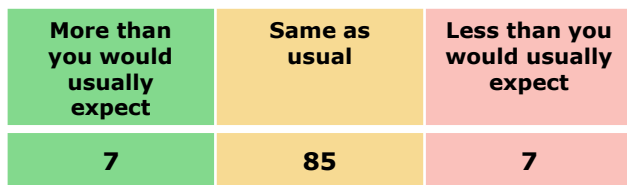
Rugby World Cup 2015: Impact on bookings

Despite the scale of the event, it appears to have minimal impact on bookings for September and October, with almost three quarters stating that their bookings had remained the same as they have historically during this period. Although respondents in Rugby World Cup areas did report an increase in bookings of 22% in comparison to usual levels.

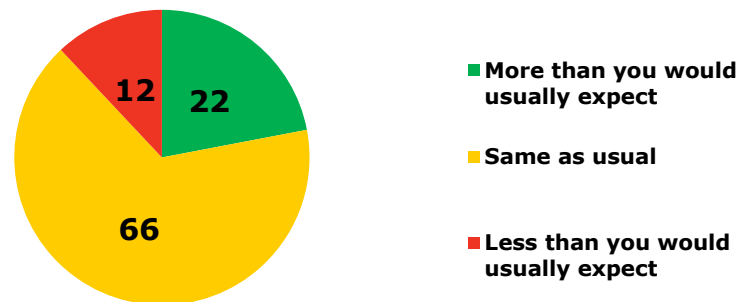
All respondents (%)



November 2014 results



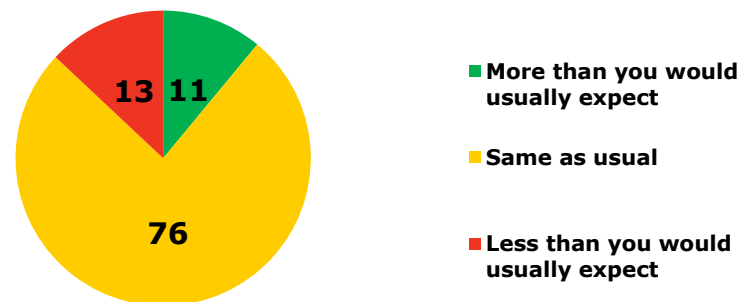
Respondents in a RWC area (%)



November 2014 results



Respondents in a non-RWC area (%)



November 2014 results

