VisitEngland

Tourism Business Monitor 2015

Wave 4 – Mid September until the end of October

bdrc continental

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Contents

Background, objectives and research method

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:

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

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

Key Findings

- The Autumn period has seen strong performance in both accommodation and attractions sectors, with high levels of satisfaction reported.
- Earlier this year, we saw a stagnation in accommodation guests from overseas in particular, but both the domestic and overseas markets have since shown strong signs of continued growth, and attractions have also reported increases in both markets compared with the same period last year.
- For the accommodation market, growth has continued to strengthen since the start of the year; the contrary is true for the attractions market, with a slowing of growth becoming apparent.
- The strongest performers have been hotels and mixed indoor/ outdoor attractions, most likely associated with unpredictable weather this Autumn.

- As we would expect for the time of year advance bookings for accommodation are tailing off, but remain higher than during the same period last year.
- Almost all accommodation and attraction businesses feel confident about the rest of 2015.
- In the accommodation sector, business optimism for the year has stayed relatively stable since January. In the attractions market, high levels of optimism earlier in the year have slightly fallen away, but nevertheless remains strong.

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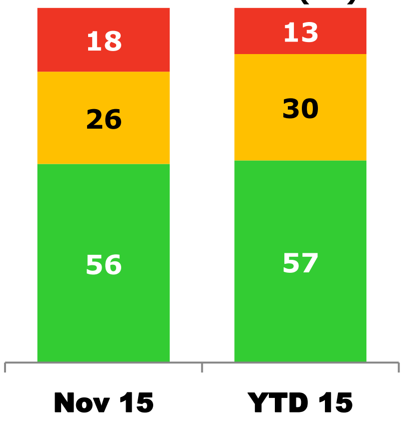
Business Dashboards

Business Performance Dashboard

Strong performance in both accommodation and attractions sectors during the Autumn period, with high levels of satisfaction reported.

ACCOMMODATION

Visitor numbers (%)

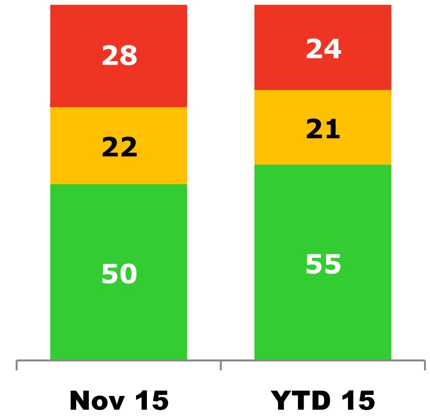


Versus same period previous year…

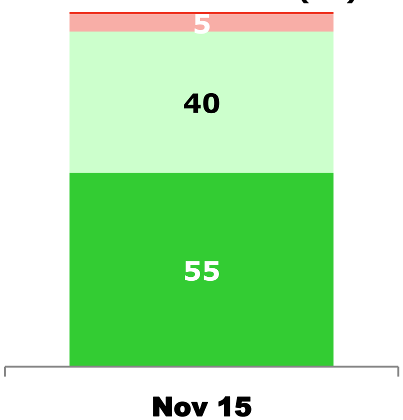
- Down
- Same
- Up

ATTRACTIONS

Visitor numbers (%)



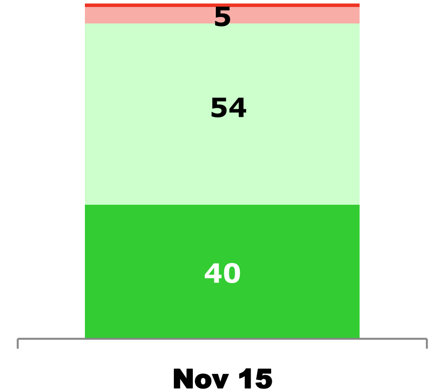
Visitor numbers (%)



Satisfied with business performance…

- Not at all
- Not very
- Quite
- Very

Satisfaction (%)

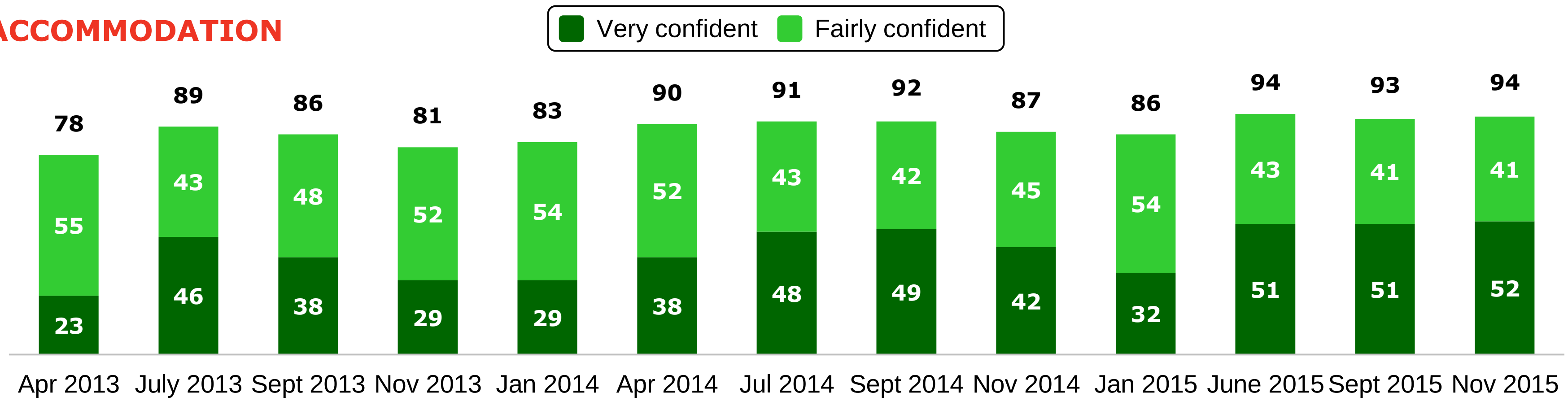


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2015: Mid September until the end of October

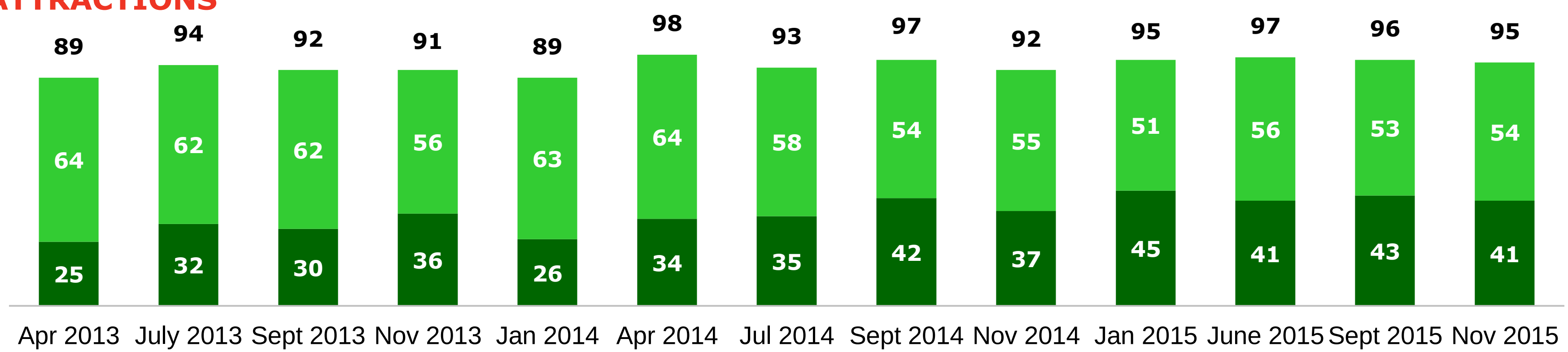
Business Confidence Dashboard: confidence for next period

Almost all accommodation and attraction businesses feel confident about the rest of 2015.

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	Until end of the school summer holidays	Until end of October	Until end of the year

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Q13

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Visitor Profile

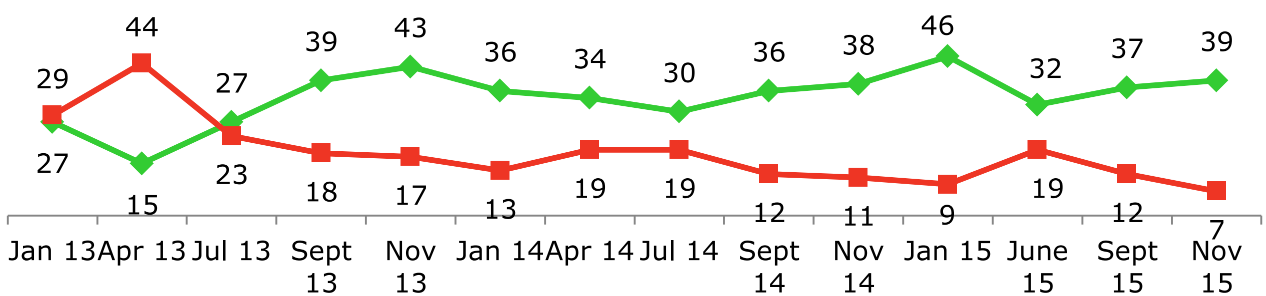
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

June results warned of potential market stagnation, but both the domestic and overseas markets have rallied and show strong signs of continued growth

Up
Down

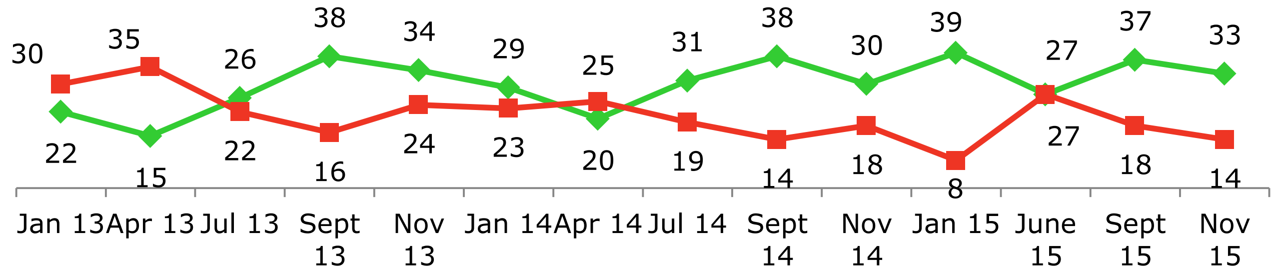
NET: Up - Down

Domestic visitors



+32

Overseas visitors



+19

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2015: Mid September until end of October

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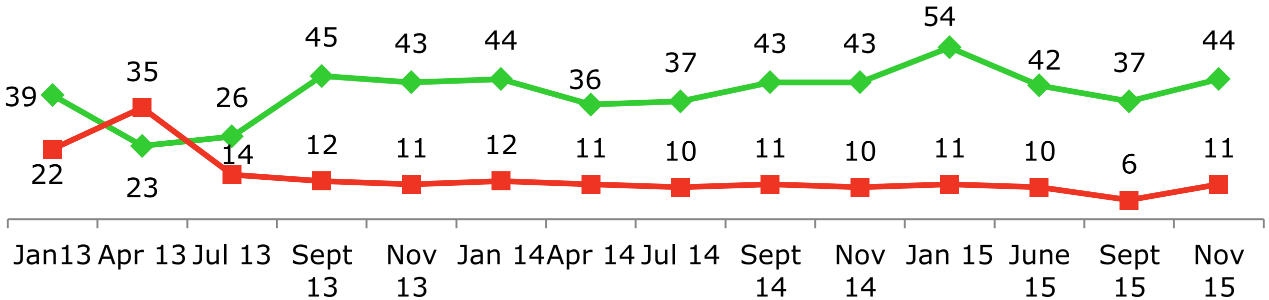
Changing Visitor Profile (year-to-date vs. previous year): Attractions

The attractions market is continuing to grow visitor numbers from both domestic and overseas markets.

Up   Down

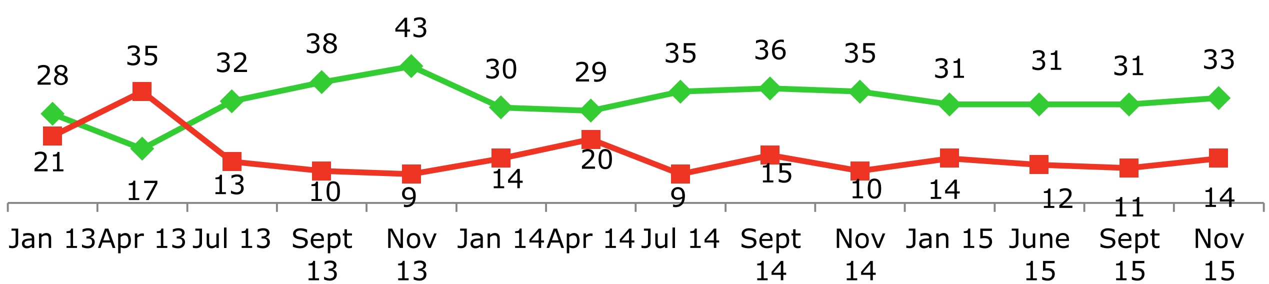
NET: Up - Down

Domestic visitors



+33

Overseas visitors



+19

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2015: Mid September until end of October

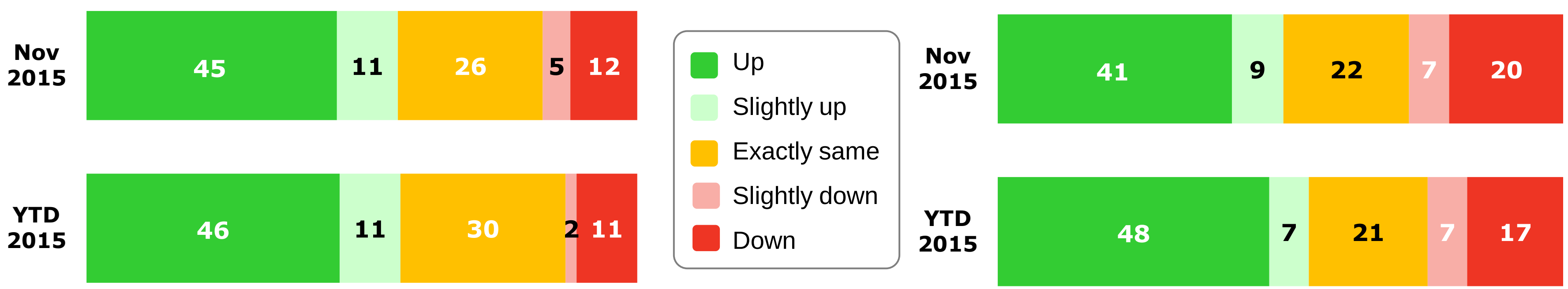
Business Performance

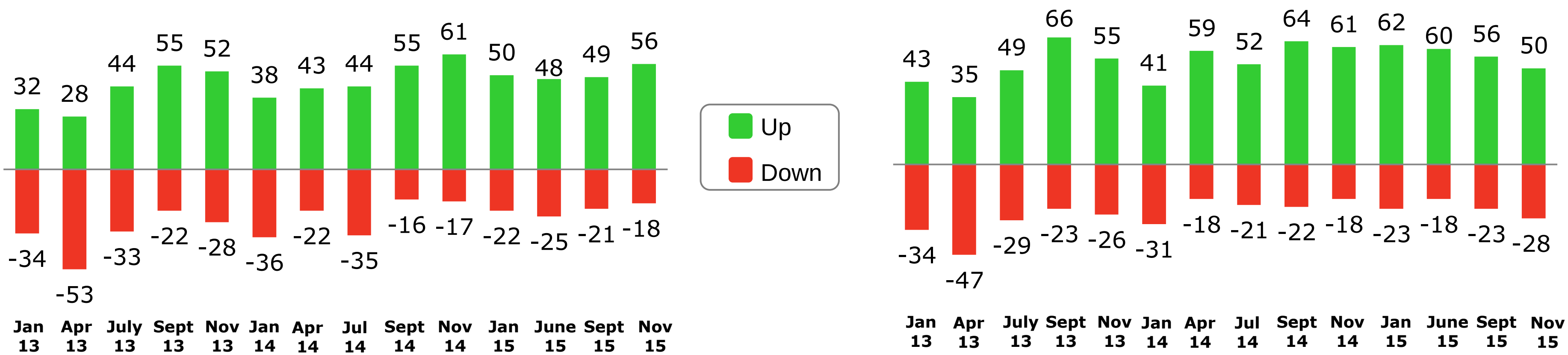
Visitor Numbers: Year-on-year changes (up /down)

Both sectors report increases in visitor numbers. For the accommodation market, growth has continued to strengthen since the start of the year; the contrary is true for the attractions market, with a slowing of growth becoming apparent.

% 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

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Q3/4 & Q7/8

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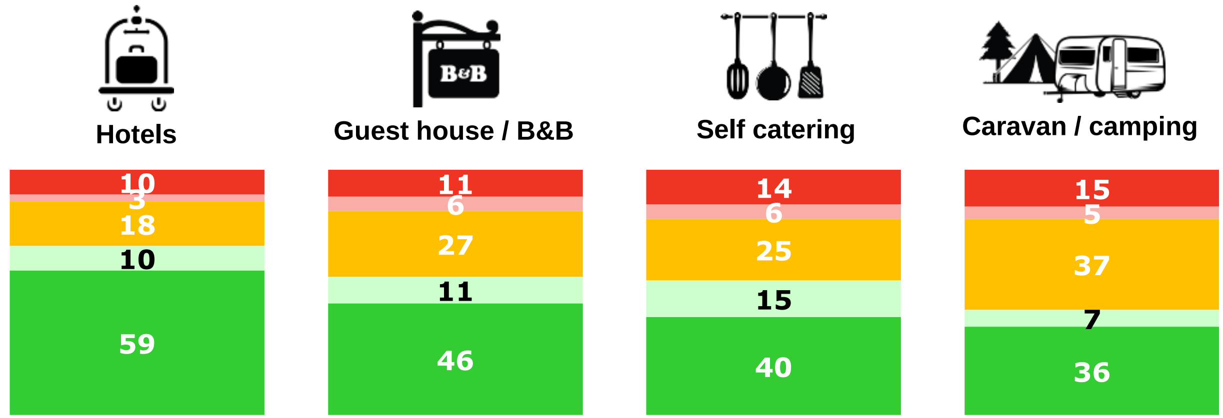
Changing business performance: By business type

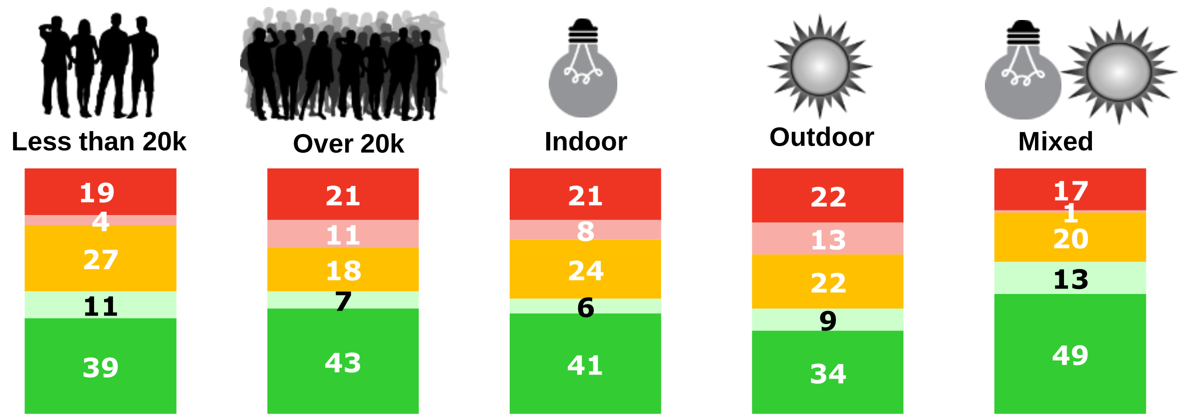
In line with historical trends, hotels are exhibiting the strongest performance, with over two-thirds reporting growth in the last couple of months.
In the attractions sector, we see the strongest growth from mixed indoor/ outdoor attractions, associated with unpredictable weather this Autumn.

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

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2015: Mid September until end of October

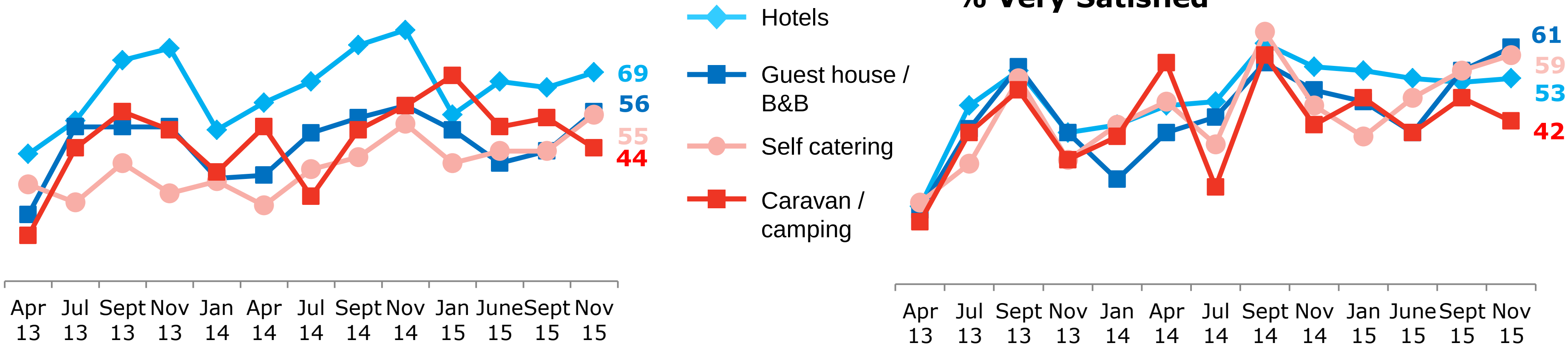
Changing business performance: By business type (trends)

Caravan and campsite growth appears to be slowing, with its lowest score since last summer.

All attraction types have seen a slowing in visitor growth during the second half of the year and this has affected satisfaction with their performance.

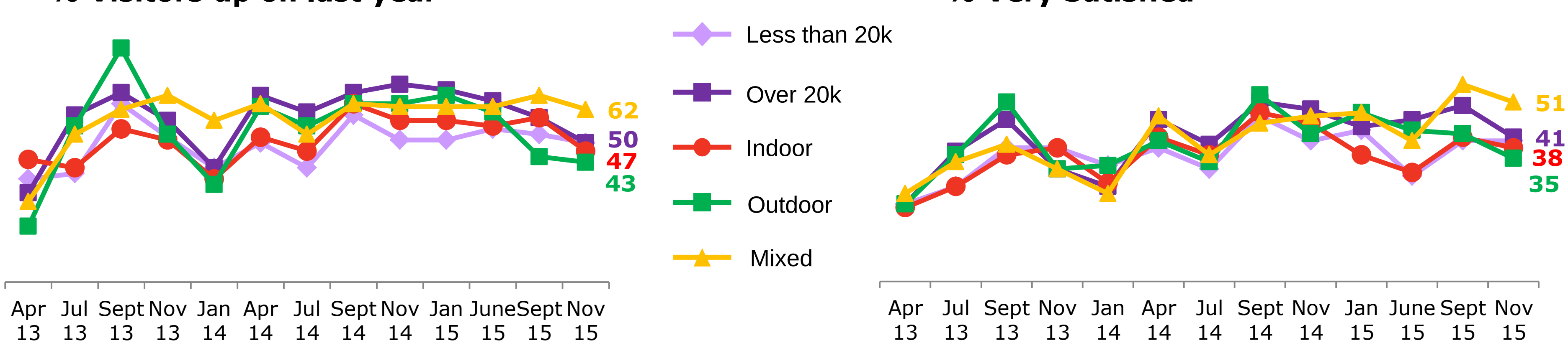
ACCOMMODATION – BY TYPE

% Visitors up on last year **% Very Satisfied**



ATTRACTIONS – BY TYPE

% Visitors up on last year **% Very Satisfied**



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

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Q3/4, Q6

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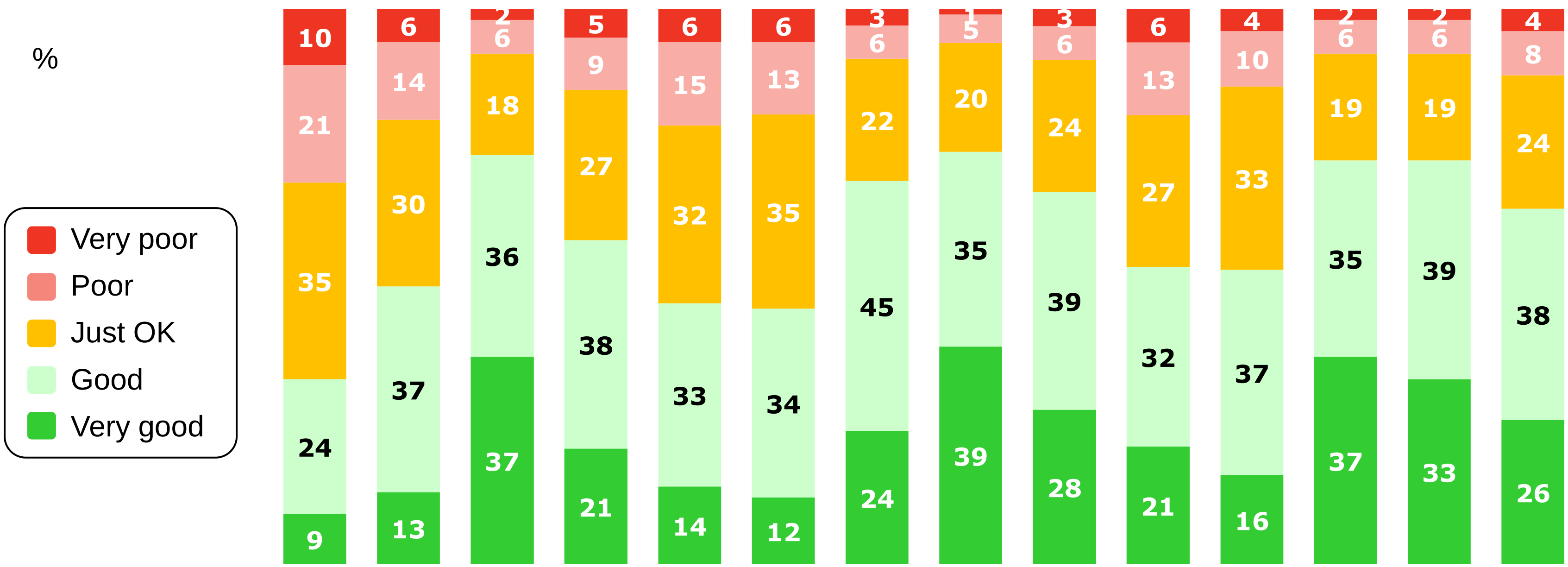
Business Confidence

Advance booking levels: Accommodation

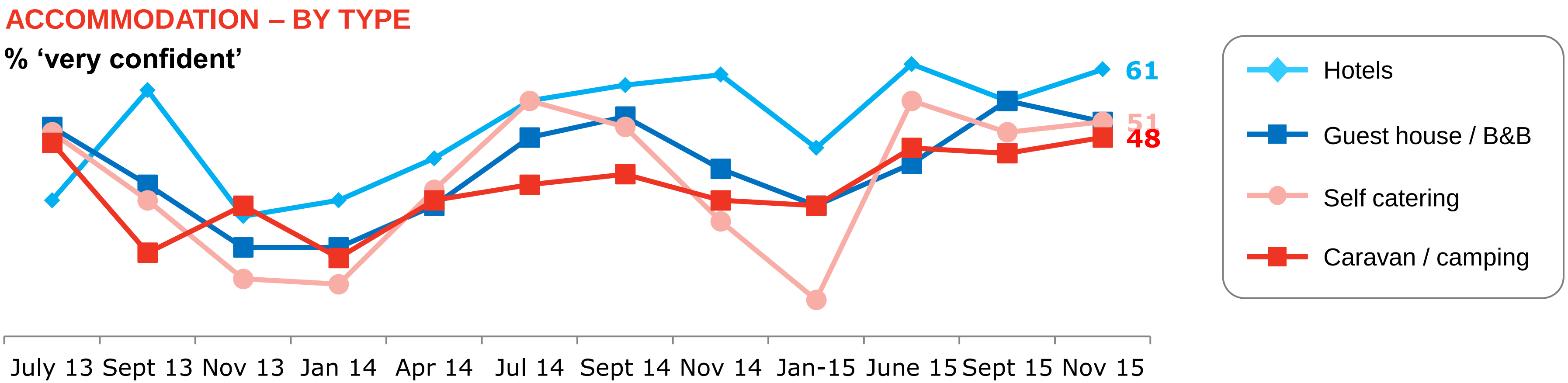
As we would expect, advance booking levels are tailing off, but remain higher than during the same period last year.

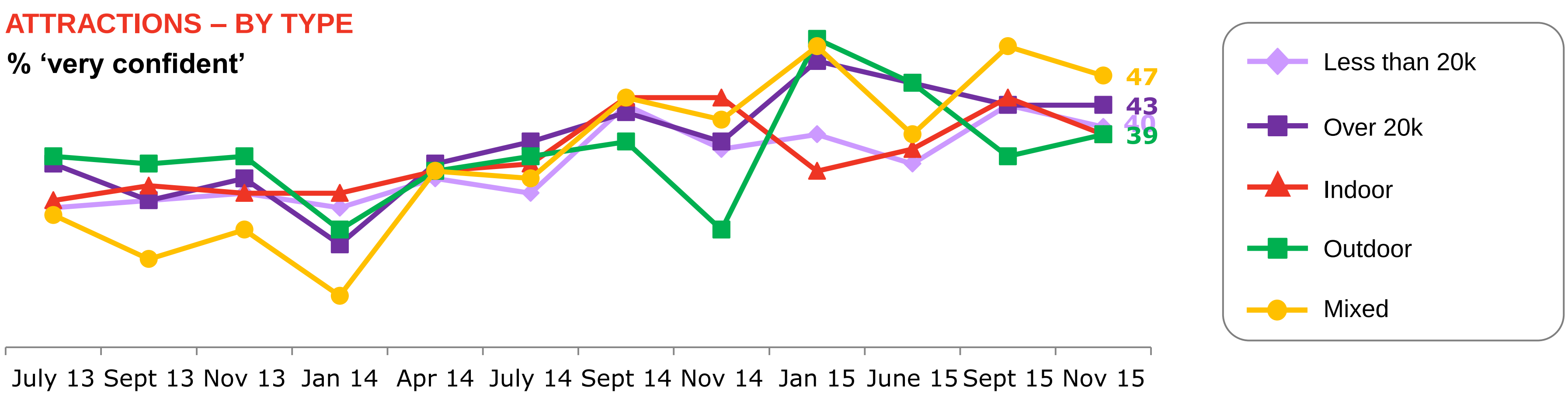


Survey conducted:	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	Jul 2014	Sept 2014	Nov 2014	Jan 2015	June 2015	Sept 2015	Nov 2015
Period asked about:	Until the end of Easter	Until late Spring/ early Summer	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until the end of the school summer holidays	Until the end of October	Until end of the year

Confidence in performance for forthcoming period: By business type

Confidence for the upcoming period is good and has remained consistent with confidence levels reported in September.



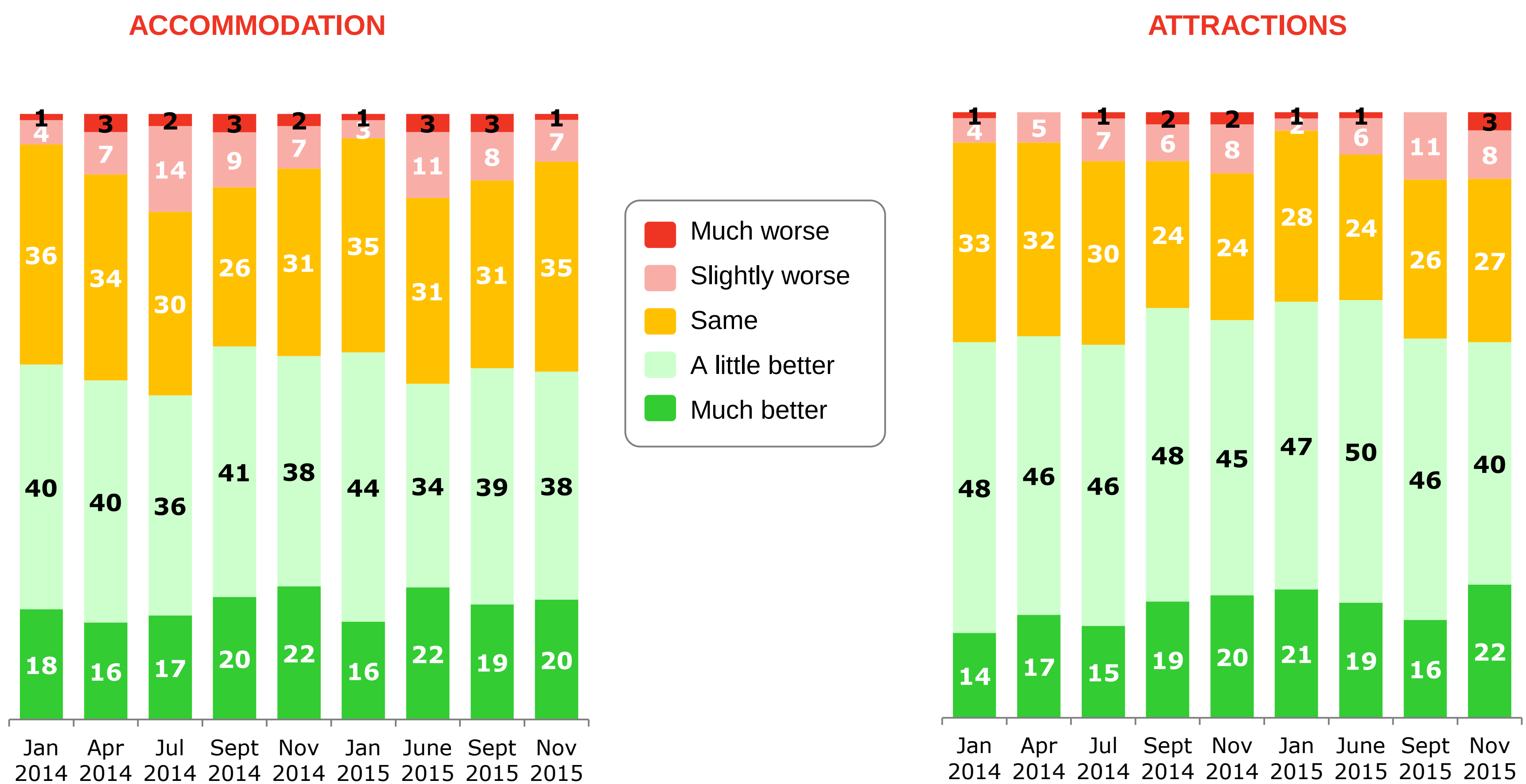


July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014	July 2014	Sept 2014	Nov 2014	Jan 2015	June 2015	Sept 2015	Nov 2015
Until end of the Summer holidays	Until end of Oct	Until end of the year	Until end of Easter	Until late Spring/ early Summer	Until end of school summer holidays	Until end of Octob er	Until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

Q13

Business optimism for 2015

In the accommodation sector, business optimism for the year has stayed relatively stable since January. In the attractions market, high levels of optimism earlier in the year have slightly fallen away, but nevertheless remains strong.



Positive verbatim comments on business optimism for 2015: Accommodation

We are selling well ahead

Just because of the amount of people we've taken this year

Continuing excellent reviews

We have done renovation recently and the hotel rooms have sold out

Signed up to booking.com and another agency, and they have generated more business

Good marketing plan

Positive verbatim comments on business optimism for 2015: Attractions

The feedback we have had is really positive

We are getting better funding

We have 5 stars on Trip Advisor and I think that sort of recognition has helped

Because we've got more volunteers helping

Because we have had a 20% increase in visitors since last year

Impact of new catering facilities

Rugby World Cup England 2015

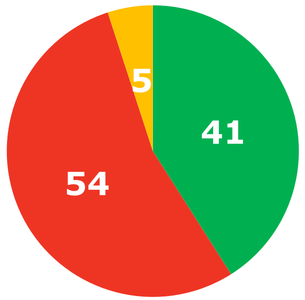
Rugby World Cup 2015: Awareness of RWC events taking place in their area

Responses show low awareness amongst accommodation businesses, with only 41% of businesses located in a Rugby World Cup area aware of events taking place there.

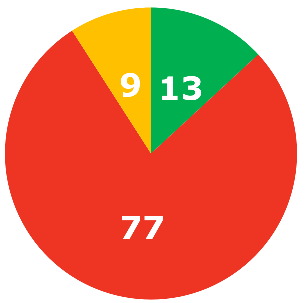
Were there any Rugby World Cup games or affiliated events that took place in or near your area?

All accommodation businesses (%)

Businesses in a RWC area (%)



Businesses in a non-RWC area (%)



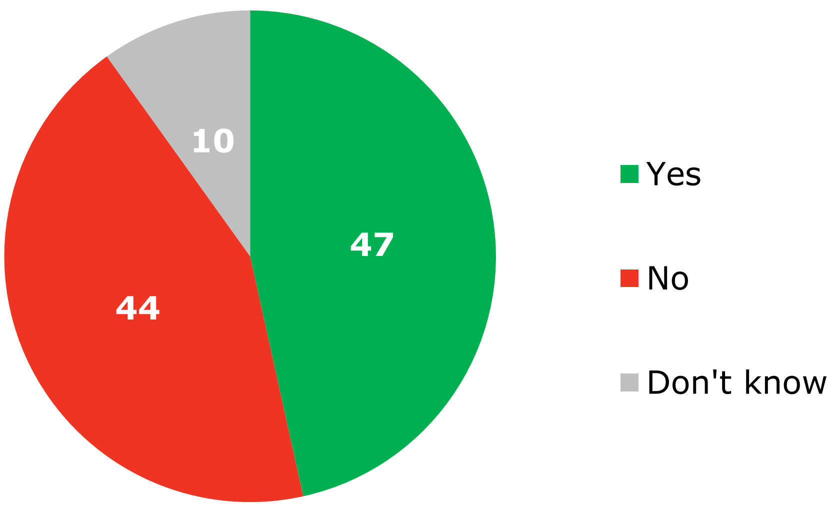
Rugby World Cup 2015: RWC guests

61% of businesses aware of Rugby World Cup matches being held in their area welcomed guests who were visiting due to the tournament.

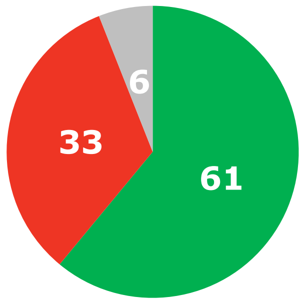
Interestingly 38% of businesses not located in a Rugby World Cup area also reported receiving guests visiting to see the RWC. This suggests that RWC holidayers may have stayed in multiple locations, benefiting businesses across England.

Over the period of the tournament, did any of your guests stay with you in order to attend a Rugby World Cup match? Based on all businesses aware of RWC matches taking place in their area.

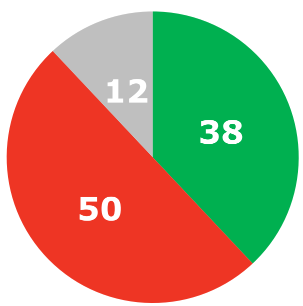
All accommodation businesses (%)



Businesses in a RWC area (%)



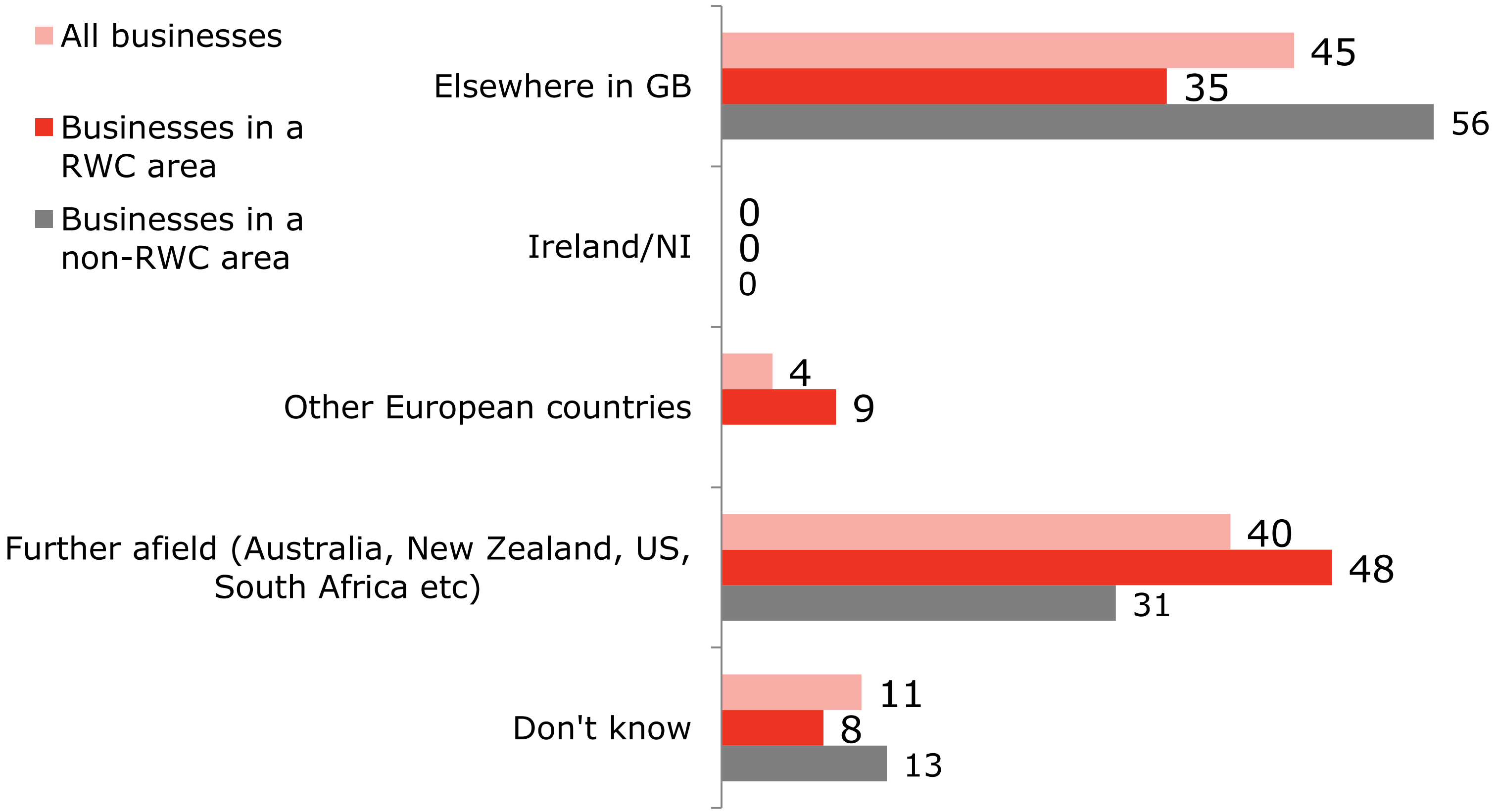
Businesses in a non-RWC area (%)



Rugby World Cup 2015: RWC guest origin

Overall, the profile of guests on a Rugby World Cup visit was fairly evenly split between domestic and overseas visitors. Particularly prominent are long-haul guests, making up 91% of overseas visits.

Where had your visitors to the Rugby World Cup travelled from in order to attend the match(es)? Were they from…? Based on all businesses welcoming guests visiting for the RWC.



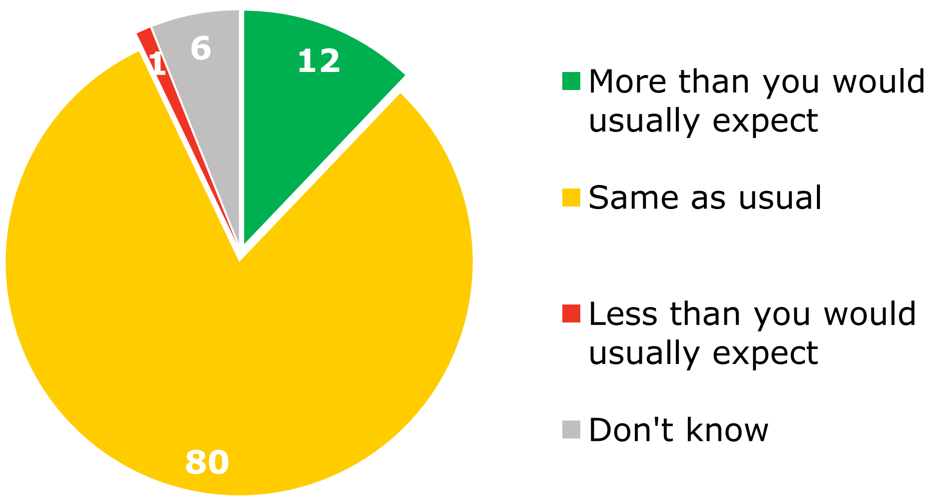
Q16c

Rugby World Cup 2015: Impact on visitor numbers

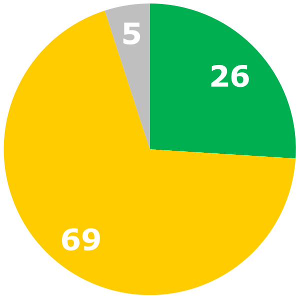
The tournament does appear to have had some impact on accommodation sites visitor numbers for September and October, with over a quarter of sites in a Rugby World Cup area reporting more visitors than they would usually expect.

What impact, if any, did the Rugby World Cup have on your visitor numbers over the tournament period? Did you see…?
Based on all businesses

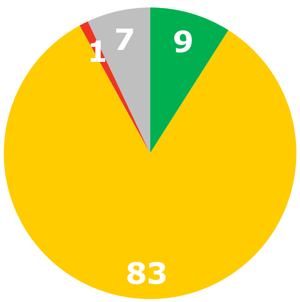
All accommodation businesses (%)



Businesses in a RWC area (%)



Businesses in a non-RWC area (%)



Q16d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