Tourism Business Monitor 2015

Wave 4 – Mid September until the end of October
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
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.
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 (%)
  - Nov 15: 56%
  - YTD 15: 57%

**ATTRACTIONS**

- Visitor numbers (%)
  - Nov 15: 50%
  - YTD 15: 55%

**Visitor numbers (%)**

- Nov 15: 40%
- YTD 15: 55%

**Satisfaction (%)**

- Nov 15: 5%
- 54%
- 40%

**Versus same period previous year…**

- Down
- Same
- Up

**Satisfied with business performance…**

- Not at all
- Not very
- Quite
- Very

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**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**

<table>
<thead>
<tr>
<th>Month</th>
<th>Very confident</th>
<th>Fairly confident</th>
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<tbody>
<tr>
<td>Apr 2013</td>
<td>78</td>
<td>55</td>
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<tr>
<td>July 2013</td>
<td>89</td>
<td>43</td>
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<tr>
<td>Sept 2013</td>
<td>86</td>
<td>48</td>
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<td>Nov 2013</td>
<td>81</td>
<td>52</td>
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<td>Jan 2014</td>
<td>83</td>
<td>54</td>
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<td>Apr 2014</td>
<td>90</td>
<td>52</td>
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<tr>
<td>Jul 2014</td>
<td>91</td>
<td>43</td>
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<tr>
<td>Sept 2014</td>
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<td>42</td>
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<tr>
<td>Nov 2014</td>
<td>87</td>
<td>45</td>
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<tr>
<td>Jan 2015</td>
<td>86</td>
<td>54</td>
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<tr>
<td>June 2015</td>
<td>94</td>
<td>43</td>
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<tr>
<td>Sept 2015</td>
<td>93</td>
<td>51</td>
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<td>Nov 2015</td>
<td>94</td>
<td>52</td>
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**ATTRACTIONS**

<table>
<thead>
<tr>
<th>Month</th>
<th>Very confident</th>
<th>Fairly confident</th>
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<tbody>
<tr>
<td>Apr 2013</td>
<td>89</td>
<td>64</td>
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<tr>
<td>July 2013</td>
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<td>Sept 2013</td>
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<td>Apr 2014</td>
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<td>Jul 2014</td>
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<td>Sept 2014</td>
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<td>Jan 2015</td>
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<td>June 2015</td>
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<td>Sept 2015</td>
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<td>Nov 2015</td>
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Almost all accommodation and attraction businesses feel confident about the rest of 2015.
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.

**Domestic visitors**

**Overseas visitors**

**NET:**
Up - Down

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

**Domestic visitors**

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan 13</th>
<th>Apr 13</th>
<th>Jul 13</th>
<th>Sep 13</th>
<th>Nov 13</th>
<th>Jan 14</th>
<th>Apr 14</th>
<th>Jul 14</th>
<th>Sep 14</th>
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<th>Jul 15</th>
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<tbody>
<tr>
<td>Visitors</td>
<td>39</td>
<td>35</td>
<td>26</td>
<td>45</td>
<td>43</td>
<td>44</td>
<td>36</td>
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<td>54</td>
<td>42</td>
<td>37</td>
<td>44</td>
<td>54</td>
<td>42</td>
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**Overseas visitors**

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan 13</th>
<th>Apr 13</th>
<th>Jul 13</th>
<th>Sep 13</th>
<th>Nov 13</th>
<th>Jan 14</th>
<th>Apr 14</th>
<th>Jul 14</th>
<th>Sep 14</th>
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<th>Apr 15</th>
<th>Jul 15</th>
<th>Sep 15</th>
<th>Nov 15</th>
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<tr>
<td>Visitors</td>
<td>28</td>
<td>35</td>
<td>32</td>
<td>38</td>
<td>43</td>
<td>30</td>
<td>29</td>
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<td>31</td>
<td>31</td>
<td>33</td>
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</tbody>
</table>

**NET:**

- **Domestic visitors (Up - Down):** +33
- **Overseas visitors (Up - Down):** +19

**Period asked about for past business performance**

Nov 2015: Mid September until end of October
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.

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

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.

**ACCOMMODATION - BY TYPE**

- **Hotels**
  - Down: 10
  - Slightly down: 18
  - Exactly same: 10
  - Slightly up: 27
  - Up: 11
  - Total: 59

- **Guest house / B&B**
  - Down: 11
  - Slightly down: 6
  - Exactly same: 11
  - Slightly up: 25
  - Up: 14
  - Total: 46

- **Self catering**
  - Down: 14
  - Slightly down: 15
  - Exactly same: 14
  - Slightly up: 24
  - Up: 22
  - Total: 40

- **Caravan / camping**
  - Down: 15
  - Slightly down: 37
  - Exactly same: 7
  - Slightly up: 13
  - Up: 17
  - Total: 36

**ATTRANGIONS – BY TYPE**

- **Less than 20k**
  - Down: 19
  - Slightly down: 11
  - Exactly same: 27
  - Slightly up: 11
  - Up: 39
  - Total: 43

- **Over 20k**
  - Down: 21
  - Slightly down: 13
  - Exactly same: 24
  - Slightly up: 8
  - Up: 22
  - Total: 41

- **Indoor**
  - Down: 21
  - Slightly down: 12
  - Exactly same: 24
  - Slightly up: 13
  - Up: 22
  - Total: 41

- **Outdoor**
  - Down: 22
  - Slightly down: 12
  - Exactly same: 22
  - Slightly up: 12
  - Up: 29
  - Total: 34

- **Mixed**
  - Down: 17
  - Slightly down: 20
  - Exactly same: 13
  - Slightly up: 11
  - Up: 17
  - Total: 49
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

- Hotels: 69, 56, 55, 44
- Guest house / B&B: 61, 59, 53, 42
- Self catering
- Caravan / camping

**ATTRACTIONS – BY TYPE**

% Visitors up on last year

- Less than 20k
- Over 20k
- Indoor
- Outdoor
- Mixed

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

Sept 2015: End of May until the end of the school summer holidays
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.

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<td>Until late Spring/ early Summer</td>
<td>Until end of summer hols</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 summer hols</td>
<td>Until end of the year</td>
<td>Until the end of Easter</td>
<td>Until the end of the school summer holidays</td>
<td>Until the end of October</td>
<td>Until end of the year</td>
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<td>Very good</td>
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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.

**ACCOMMODATION – BY TYPE**

% ‘very confident’

**ATTRACTIONS – BY TYPE**

% ‘very confident’

### Table: Summer holidays

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<tbody>
<tr>
<td>Until the end of the Summer holidays</td>
<td>Until end of Oct</td>
<td>Until end of the year</td>
<td>Until end of Easter</td>
<td>Until late Spring/ early Summer</td>
<td>Until end of school holidays</td>
<td>Until end of October</td>
<td>Until the end of the year</td>
<td>Until end of school holidays</td>
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### Graphs:

- **Hotels**
- **Guest house / B&B**
- **Self catering**
- **Caravan / camping**

- **Less than 20k**
- **Over 20k**
- **Indoor**
- **Outdoor**
- **Mixed**

**VisitEngland**
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 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 (%)
- Yes, there were one or more events taking place in my area: 9
- No, there were no RWC events in my area: 54
- I'm not sure whether there were any events in my area: 73

Businesses in a RWC area (%)
- Yes: 5
- No: 54
- I'm not sure: 41

Businesses in a non-RWC area (%)
- Yes: 9
- No: 77
- I'm not sure: 13
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.
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.**

- **All businesses**
  - Elsewhere in GB: 45
  - Ireland/NI: 0
  - Other European countries: 11
  - Further afield (Australia, New Zealand, US, South Africa etc): 40
- **Businesses in a RWC area**
  - Elsewhere in GB: 35
  - Ireland/NI: 0
  - Other European countries: 4
  - Further afield (Australia, New Zealand, US, South Africa etc): 48
- **Businesses in a non-RWC area**
  - Elsewhere in GB: 0
  - Ireland/NI: 0
  - Other European countries: 9
  - Further afield (Australia, New Zealand, US, South Africa etc): 31

**Don't know**
- 11
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 (%)**

- More than you would usually expect: 12%
- Same as usual: 80%
- Less than you would usually expect: 6%
- Don't know: 1%

**Businesses in a RWC area (%)**

- More than you would usually expect: 26%
- Same as usual: 69%
- Less than you would usually expect: 5%
- Don't know: 9%

**Businesses in a non-RWC area (%)**

- More than you would usually expect: 17%
- Same as usual: 83%