

# Tourism Business Monitor 2014

Wave 5 – Mid-September until the end of October



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Tourism Business Monitor designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

Amalgamation of two previous surveys discontinued at end of 2011:

- England Attractions Monitor
- Accommodation Business Confidence Monitor

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 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

**Both business types have fared well over the post-summer holiday period, perhaps partly to do with the clement weather during this time, and both report overall visitor increases of 5%, which in turn has buoyed year-to-date figures. As a result of the strong recent performance, and that of the year so far, satisfaction levels and confidence for the forthcoming period are generally high amongst both attraction and accommodation businesses.**

Both business types have fared similarly over this most recent period, with just over 60% of both reporting increases in visitors.

Hotels, larger and outdoor attractions have seen the greatest increase in visitor numbers for this latest period compared with this time last year – possibly linked with the unseasonably warm weather during this period and an improving economic environment - but all business types have seen at least some increase.

More accommodation businesses are reporting that visitors are up on last year than did so last wave (Sept '14) and consequently satisfaction levels are also higher than they were at this time last year. Satisfaction levels are also higher amongst all attraction types than in Nov '13.

Advance booking levels have dipped since the Sept '14 period but are higher than at this same time last year, when 14% of businesses said booking levels were very good compared with 21% this year.

Confidence levels remain strong following summer, although there has been notable drops among the more weather-dependent caravan/campsites and outdoor attraction businesses.

Buoyed by the particularly successful summer and post-summer holiday periods, both accommodation and attraction businesses are feeling optimistic about 2014 as a whole being better than 2013.

Almost 2 in 5 accommodation businesses overall say they are definitely aware of the Rugby World Cup, and this unsurprisingly rises to half within Rugby World Cup regions, demonstrating it's on their businesses radar. Of those aware of the Rugby World Cup, 1 in 5 were definitely aware of any RWC games or affiliated events in their area. Although low levels, slightly more accommodation businesses in Rugby World Cup areas are reporting more enquires/bookings than usual for that period than those in non-Rugby World Cup areas, suggesting that the Rugby World Cup may already be having a direct influence on accommodation bookings.

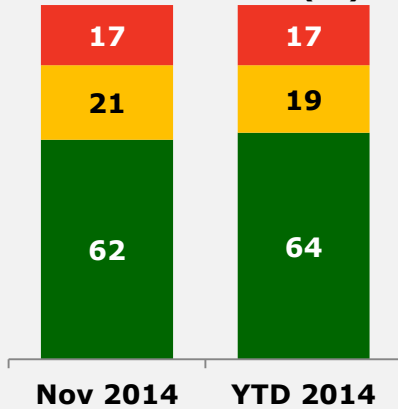
# Business Dashboards



# Business Performance Dashboard

## Accommodation

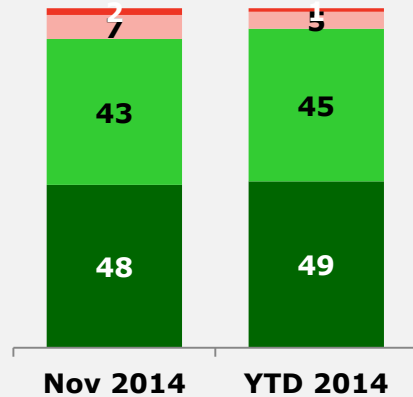
### Visitor numbers (%)



Versus same period previous year...

- Down
- Same
- Up

### Satisfaction (%)

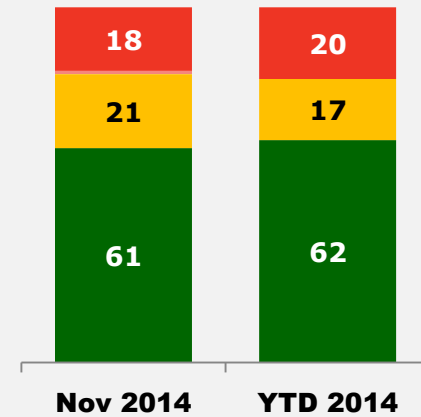


Satisfied with business performance...

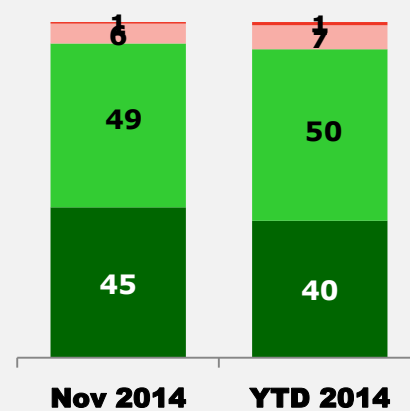
- Not at all
- Not very
- Quite
- Very

## Visitor Attractions

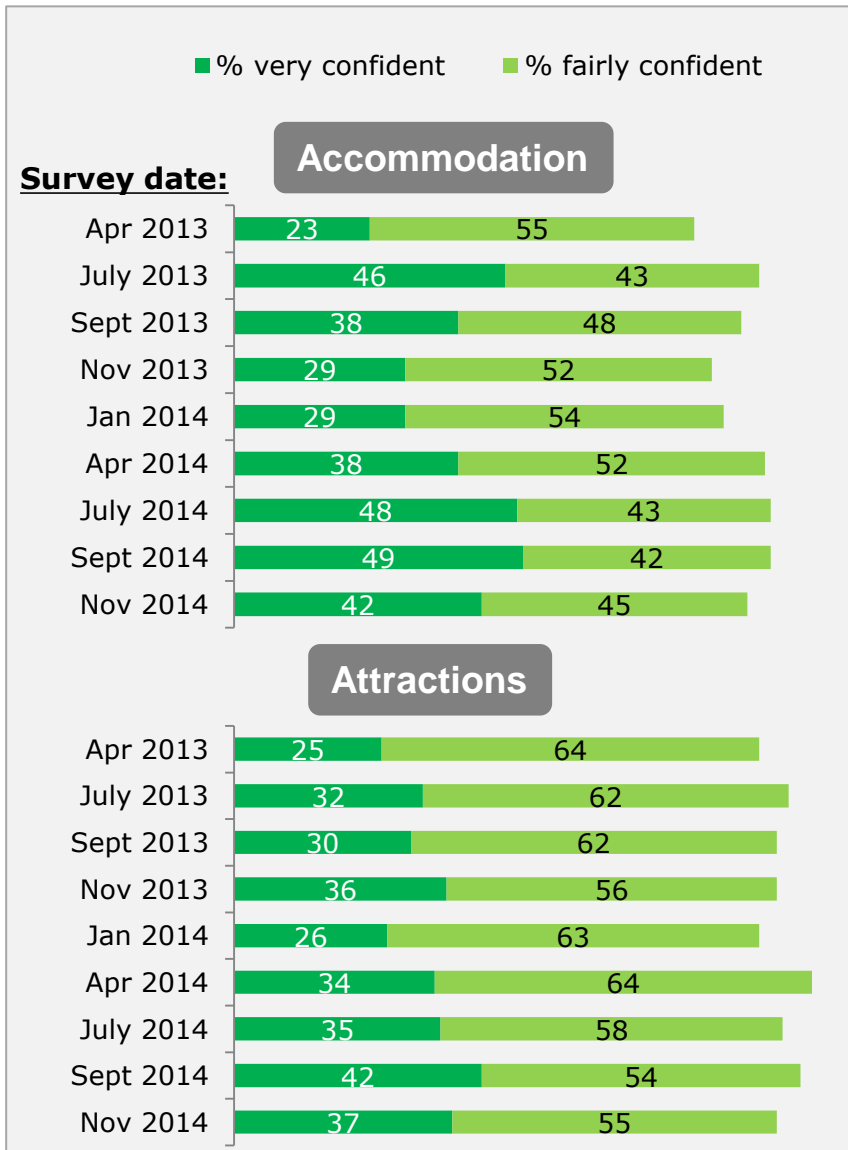
### Visitor numbers (%)



### Satisfaction (%)



# Business Confidence Dashboard: confidence for next 1.5-2 months



## Period asked about:

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

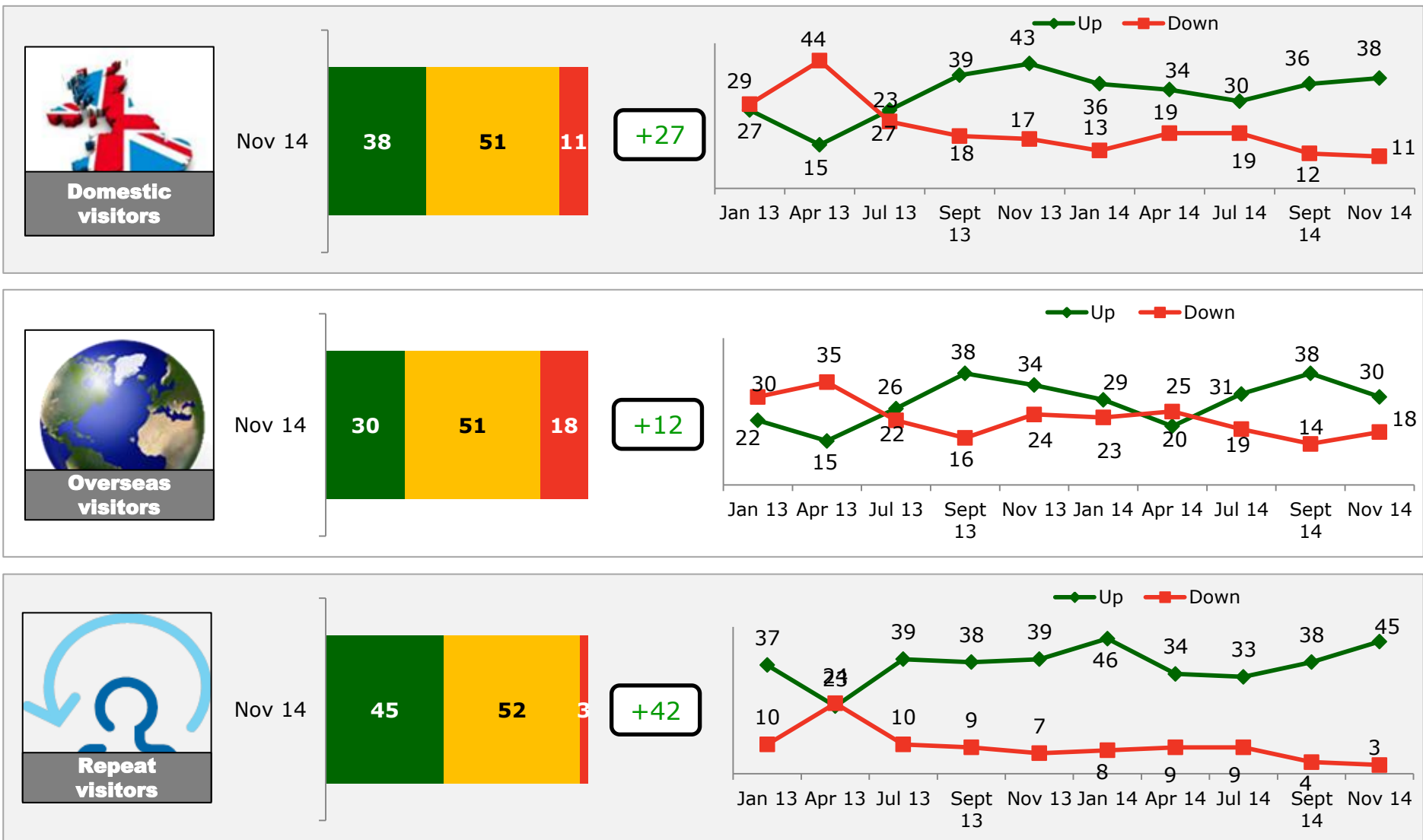
# Visitor Profile





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

■ Up    ■ Same    ■ Down    **NET:**  
**Up - Down**



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



**NET:**  
Up - Down

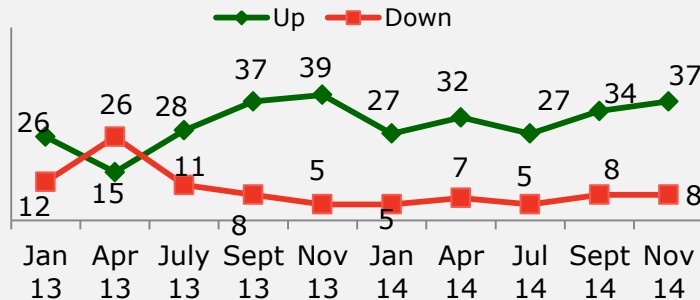


**Visitors from immediate locality**

Nov 14

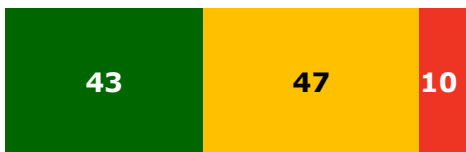


**+29**

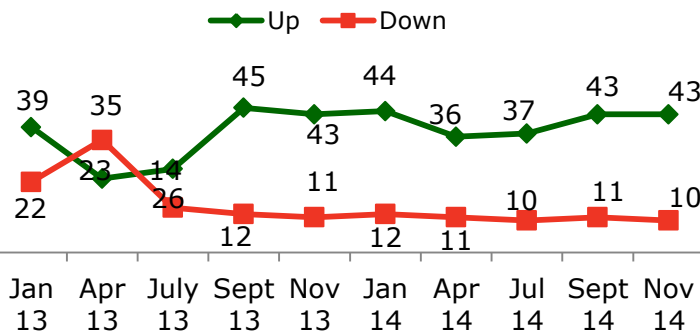


**Other domestic visitors**

Nov 14



**+33**

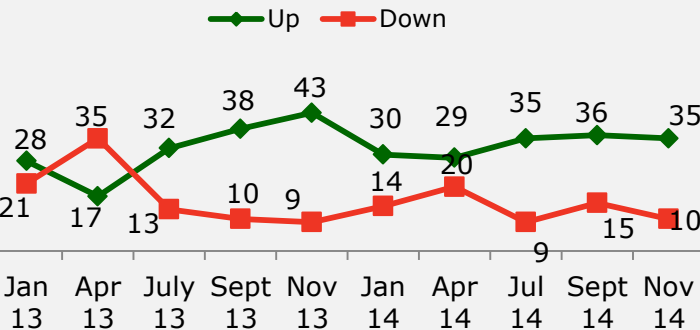


**Overseas visitors**

Nov 14



**+25**

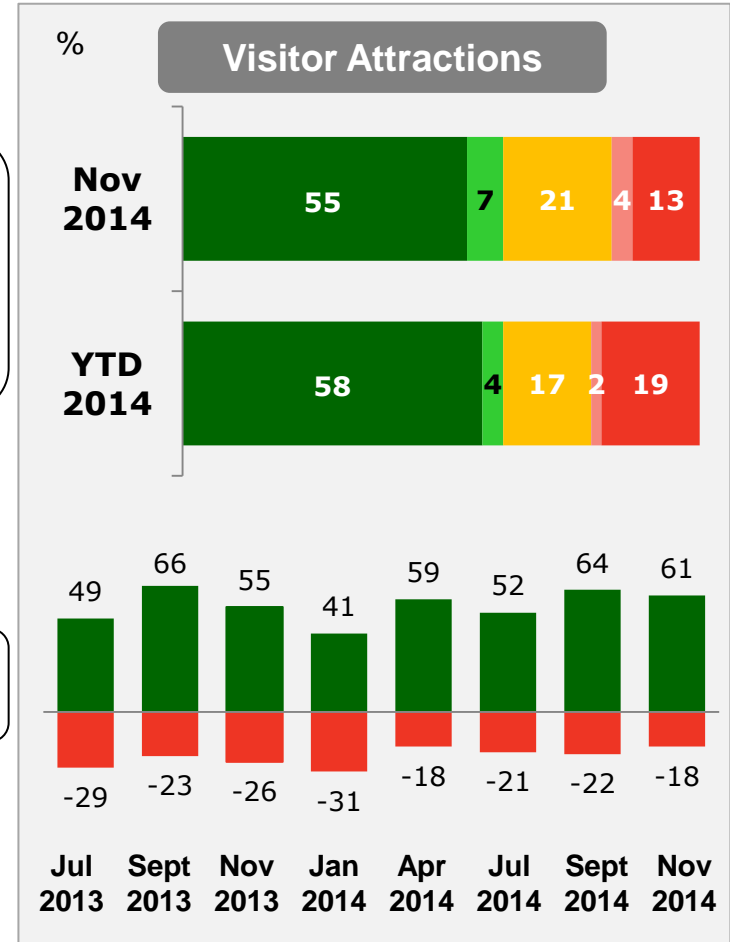
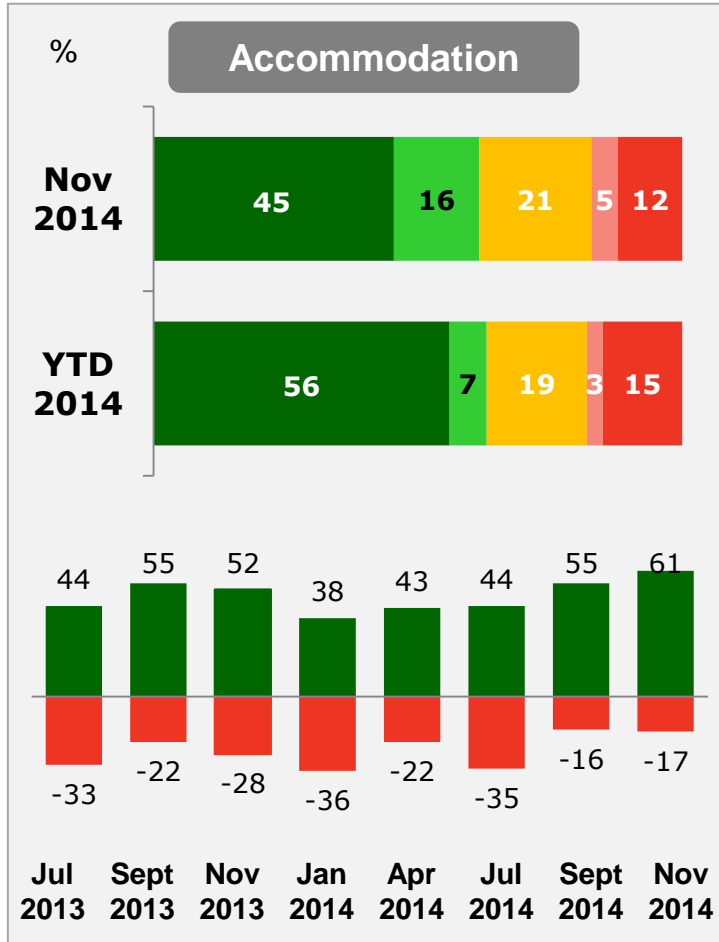


# Business Performance



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

Both accommodation businesses and attractions have fared similarly over this most recent period, with 61% of both reporting increases in visitors.

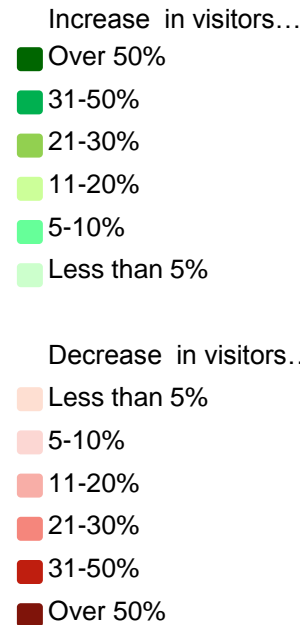
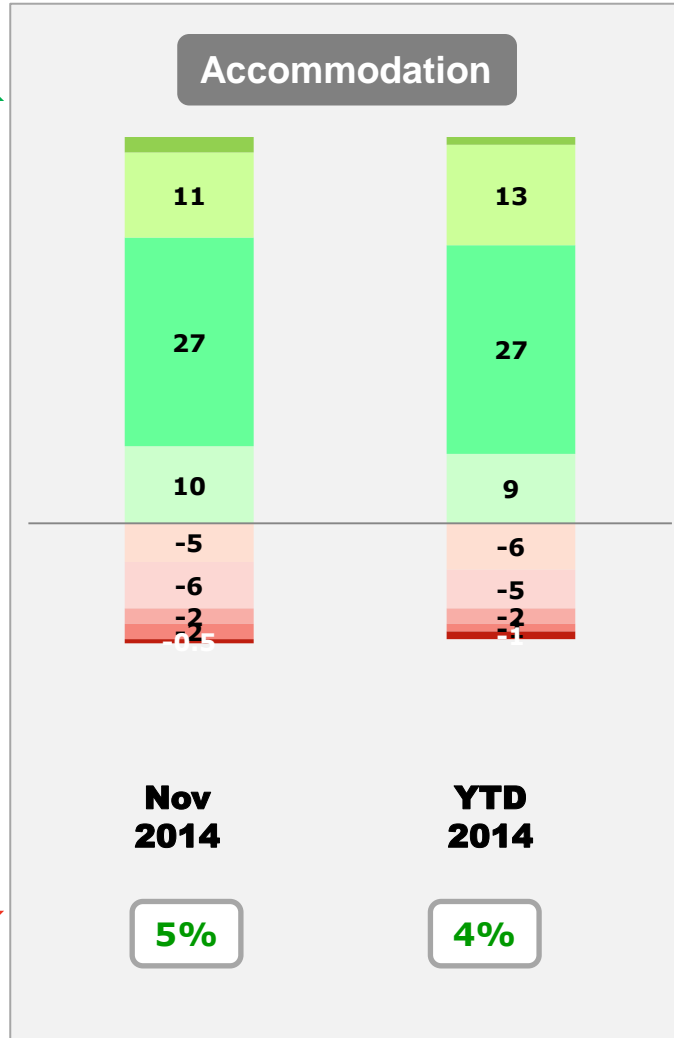


#### PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

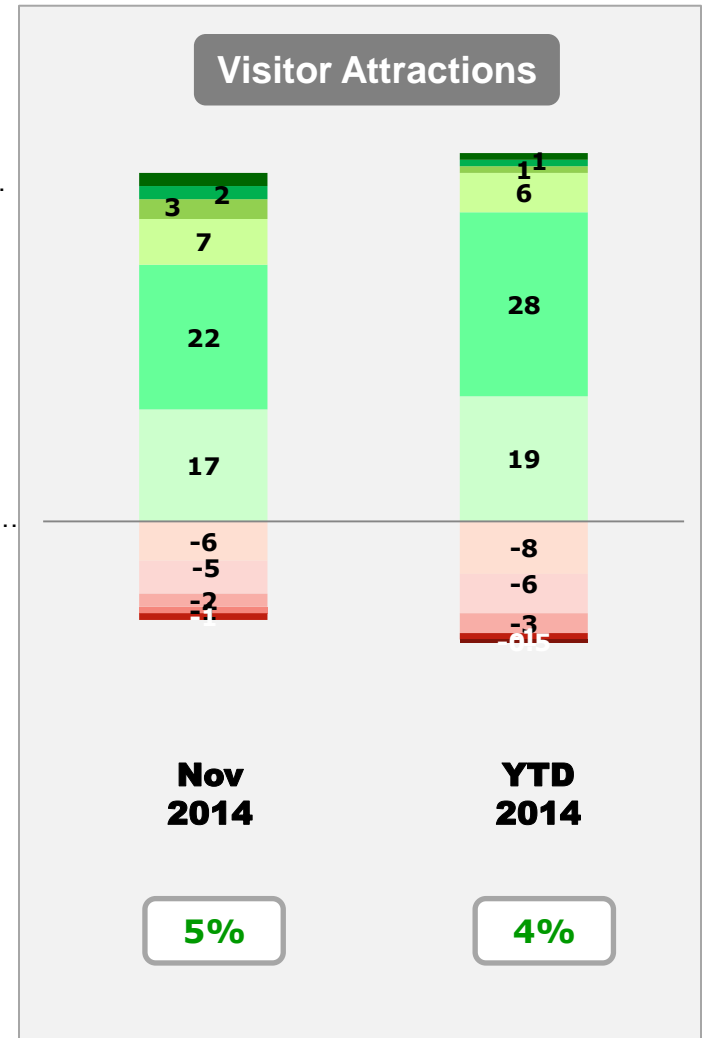
Nov 2014: Mid-September until the end of October / Sept 2014: Mid-July until end of Summer holidays/ Jul 2014: After Easter holidays until mid-July / Apr 2014: Easter period 2014 / Jan 2014: Christmas and New Year period 2013

# Visitor Numbers: Year-on-year changes (%)

Both business types have seen identical increases in visitors overall, both for the most recent post-summer holiday period and consequently for the year-to-date, at 5% and 4% respectively.



Average % change



# Changing business performance: By business type

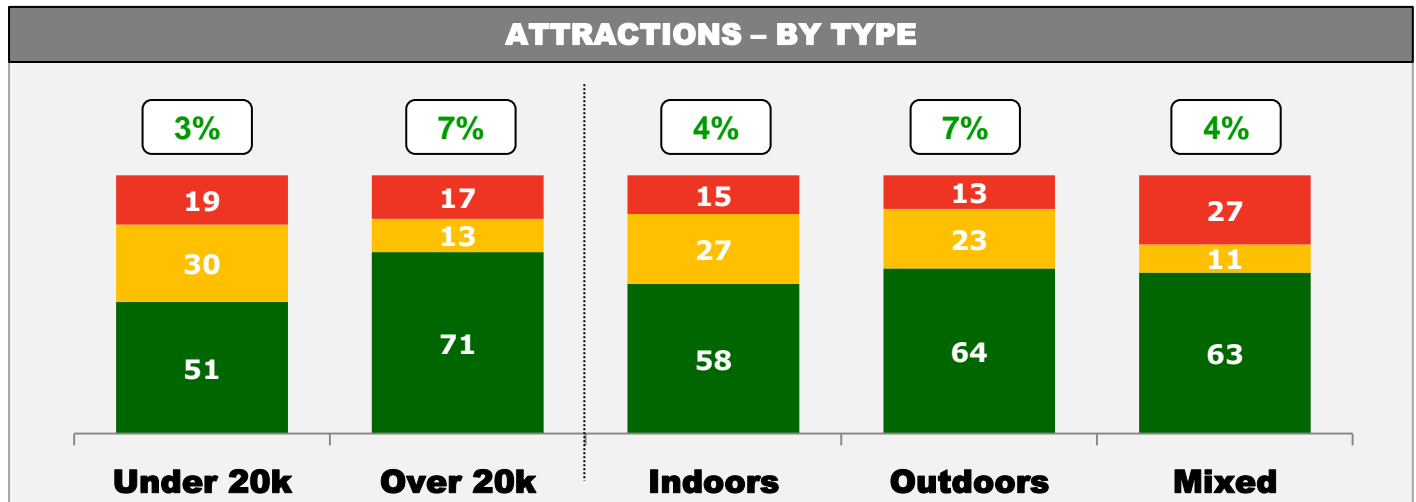
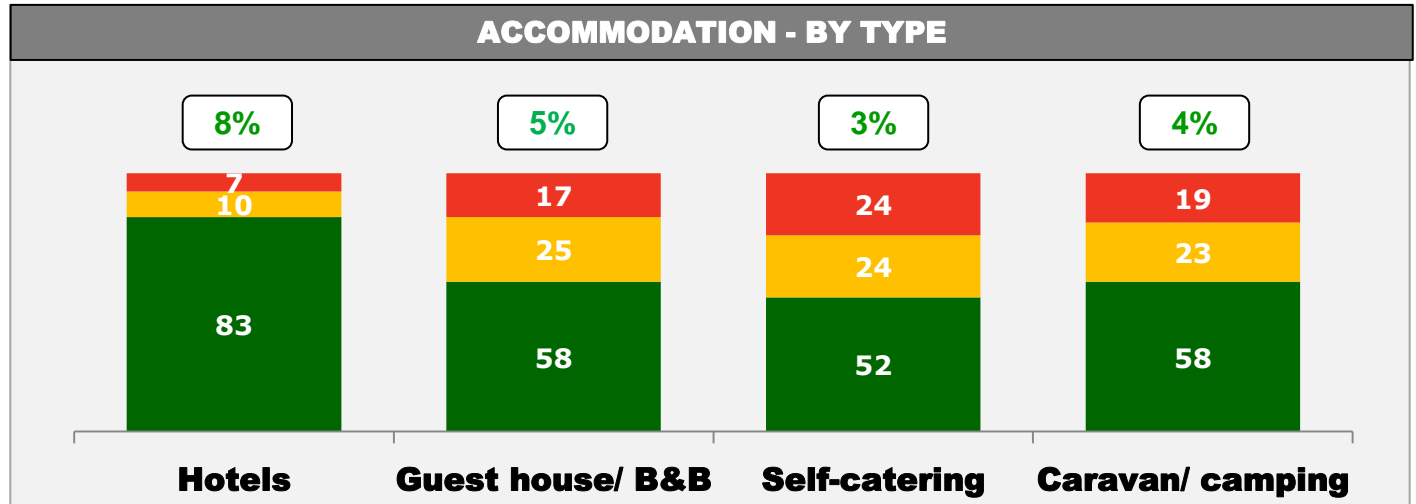
Hotels, larger and outdoor attractions have seen the greatest increase in visitor numbers for this latest period compared with this time last year, but all business types have seen at least some increase.

Versus same period previous year...

% of businesses:

- Down
- Same
- Up

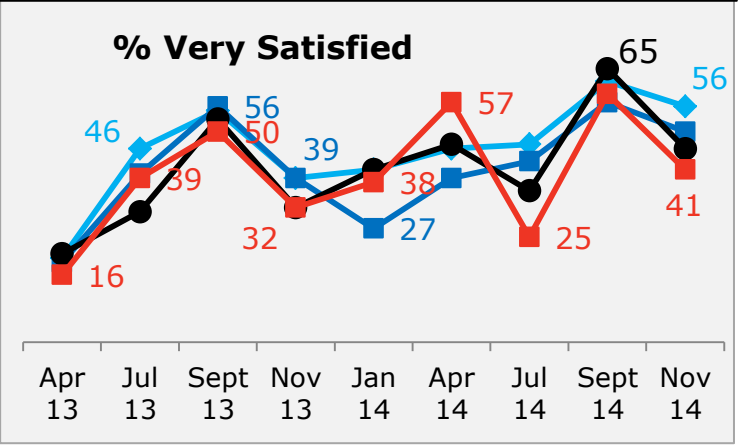
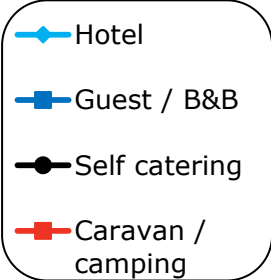
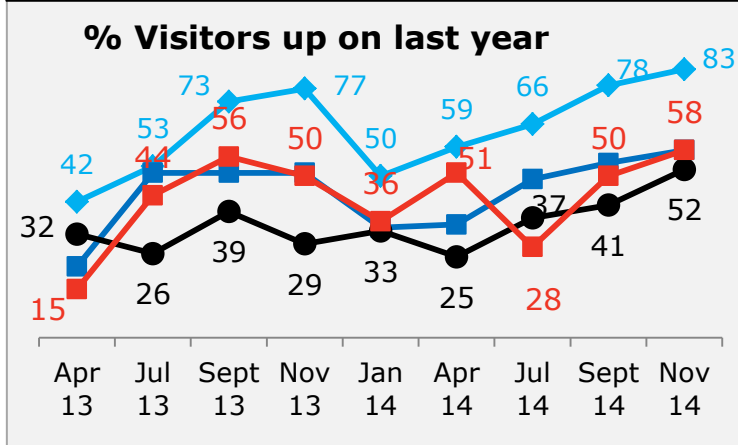
% change in visitor numbers:



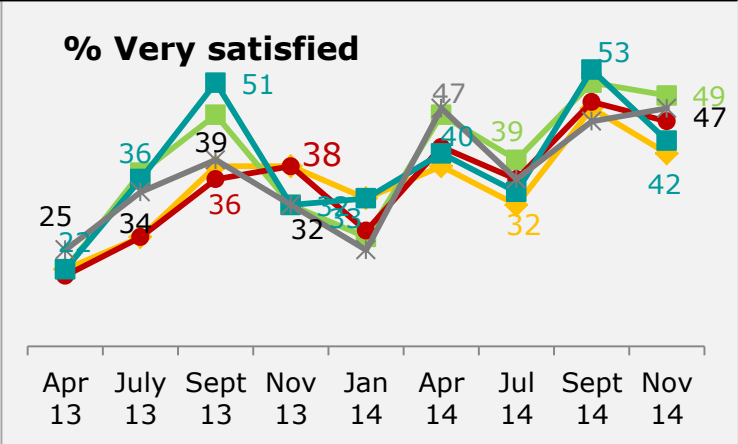
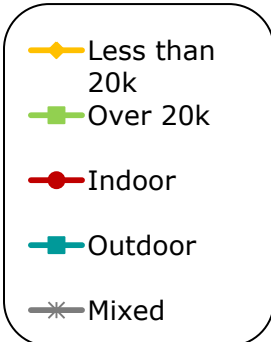
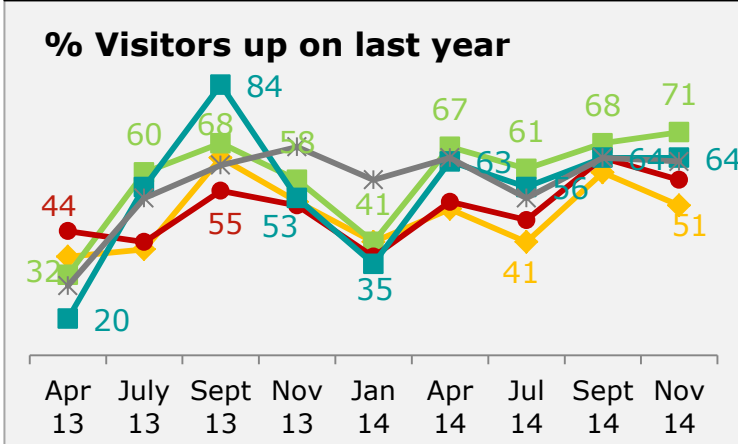
# Changing business performance: By business type

More accommodation businesses are reporting that visitors are up on last year than last wave (Sept '14), with hotels faring particularly well, and consequently satisfaction levels are higher than they were at this time last year. Satisfaction levels are also higher amongst all attraction types than in Nov '13.

## ACCOMMODATION - BY TYPE

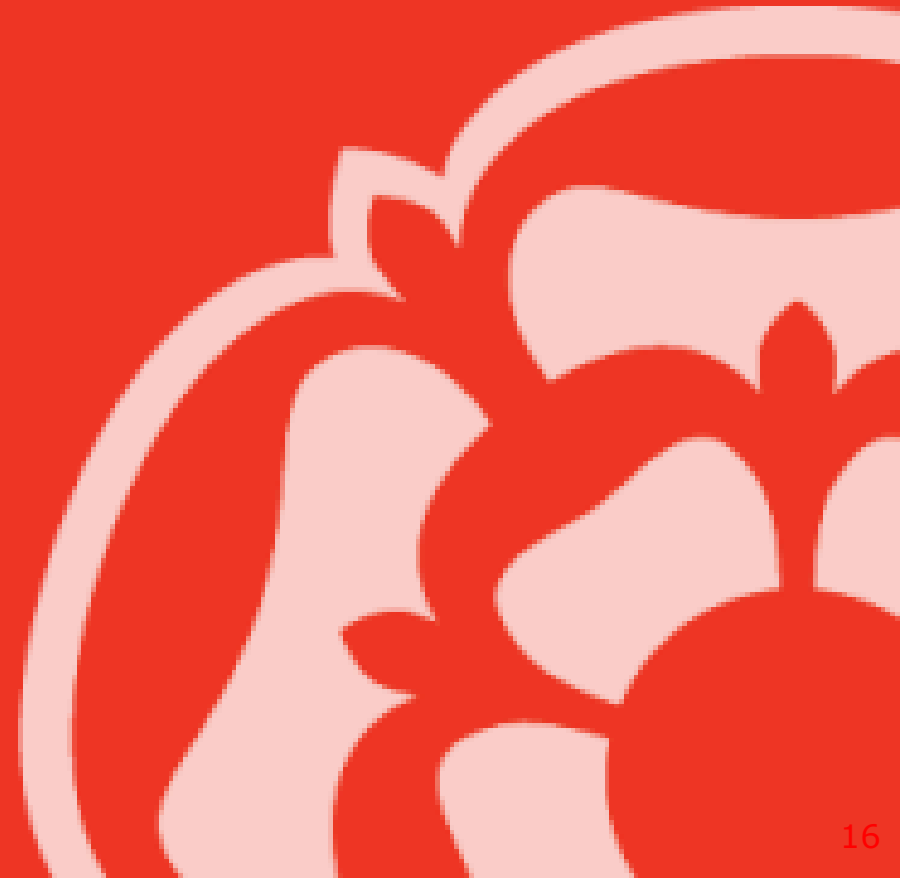


## ATTRACTIONS - BY TYPE



# Rugby World Cup

(Accommodation businesses  
only)



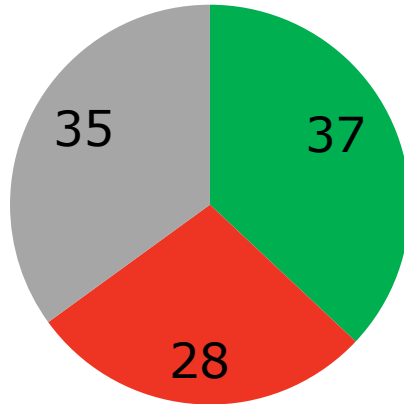


## Rugby World Cup awareness

Almost 2 in 5 accommodation businesses overall say they are definitely aware of the Rugby World Cup, and this unsurprisingly rises to 1 in 2 amongst businesses within Rugby World Cup regions; demonstrating its on their businesses radar.

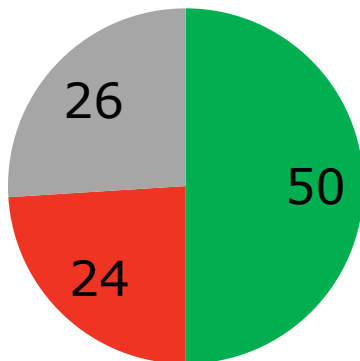
%

All

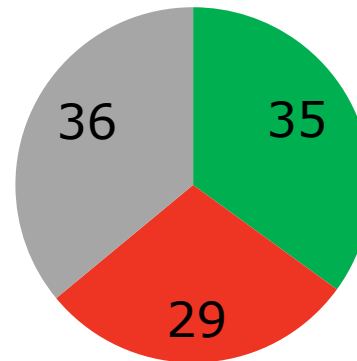


- Definitely aware of event
- Have heard about it, but don't know any details
- Was not aware of this event before now

RWC areas\*



Non-RWC areas

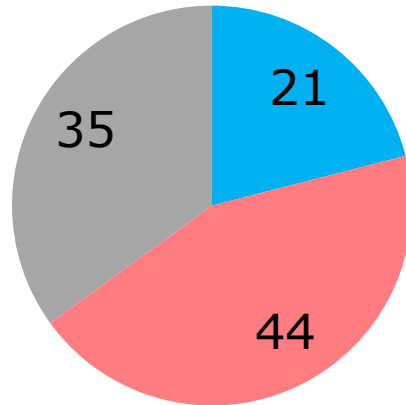


## Awareness of Rugby World Cup games or affiliated events in area

Of those aware of the Rugby World Cup, 1 in 5 were definitely aware of any RWC games or affiliated events in their area. This rose to almost half of those in Rugby World Cup areas.

%

All

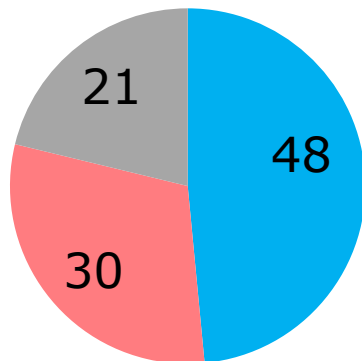


■ Definitely aware of event

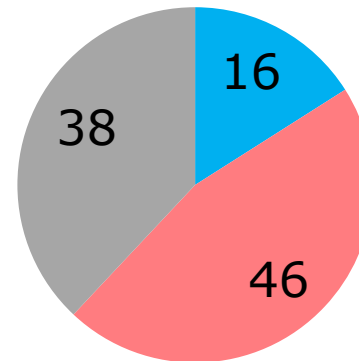
■ Not aware, but haven't looked into it

■ There are no Rugby World Cup events in my area

RWC areas\*

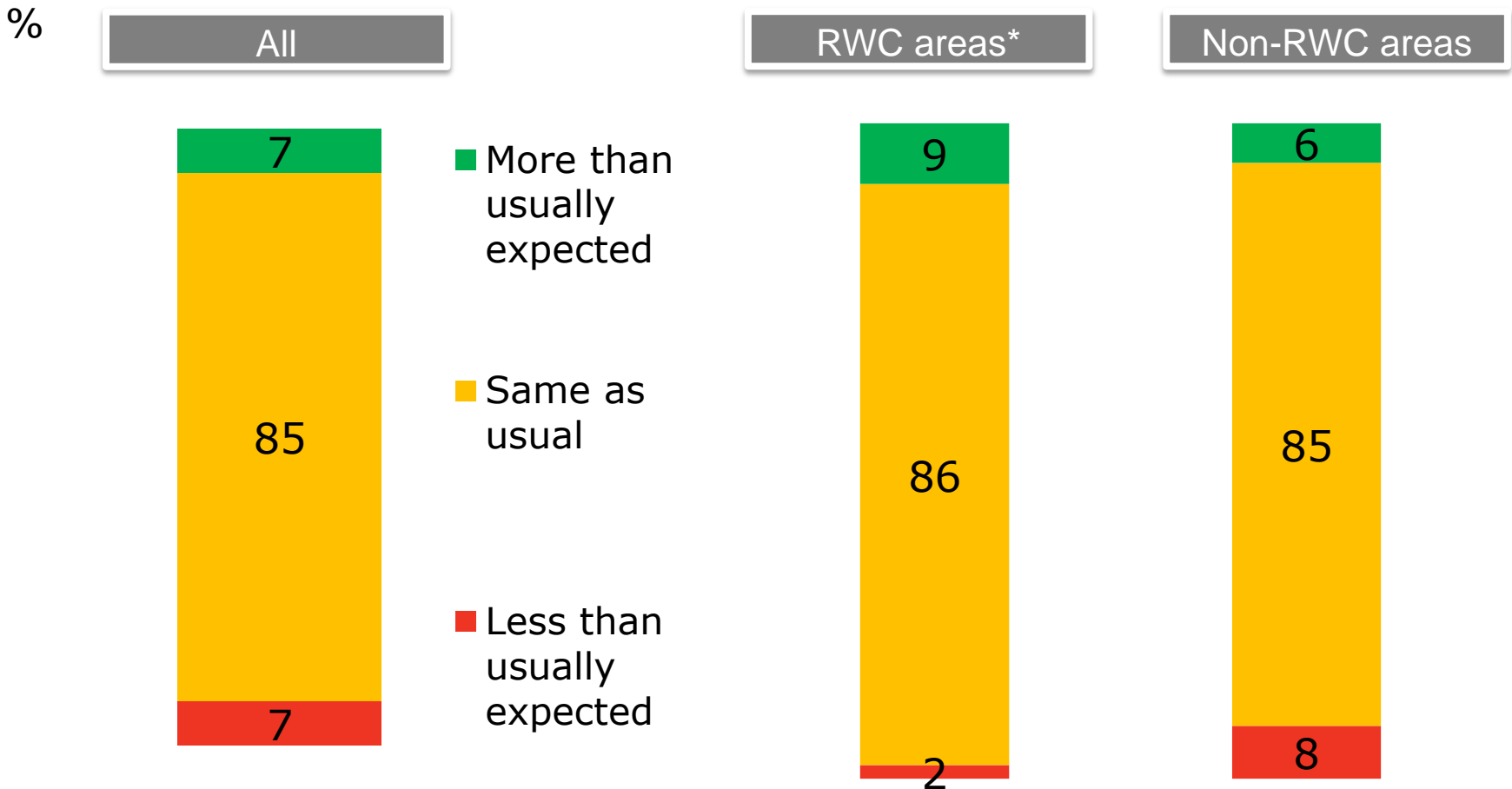


Non-RWC areas



## Enquiries and booking levels

The vast majority of businesses (85%) are reporting that enquiries and booking levels are the same as usual for the Rugby World Cup period next year. However, more businesses (albeit a small proportion) in Rugby World Cup areas are reporting more enquires/bookings than usual for that period than those in non-Rugby World Cup areas, suggesting that the Rugby World Cup may already be having a direct influence on accommodation bookings.

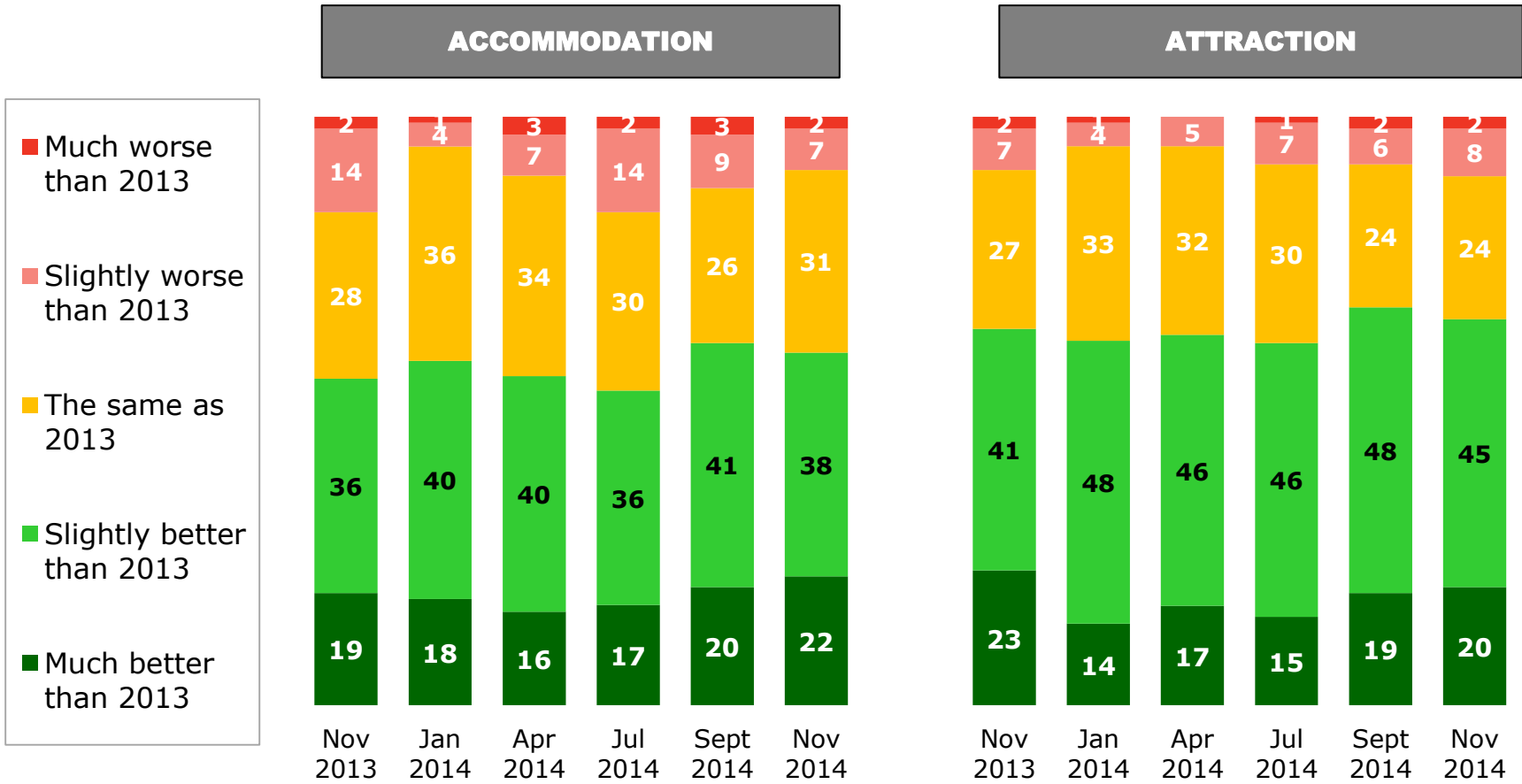


Business  
Confidence



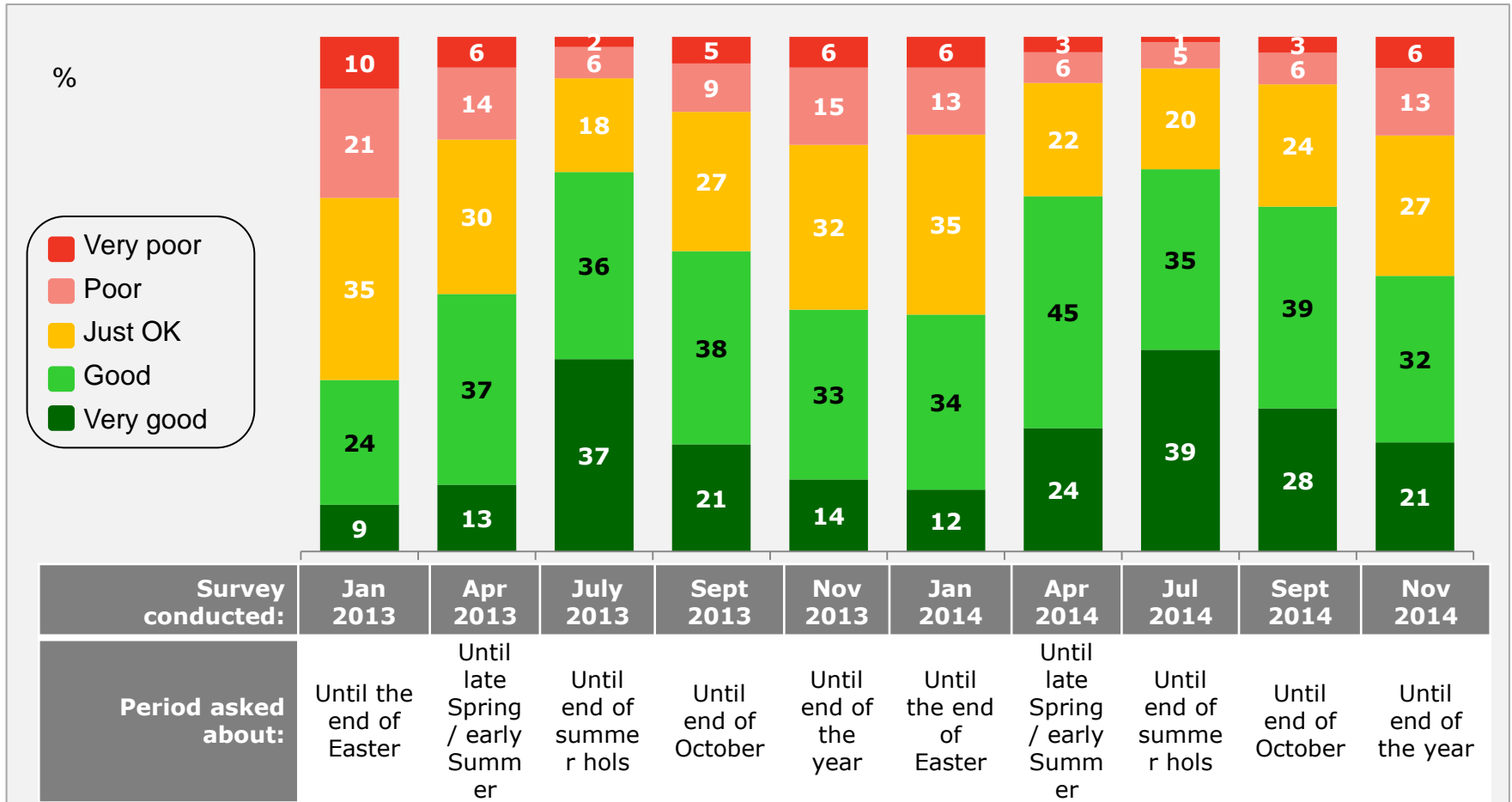
# Business optimism for 2014

Buoyed by the successful summer and post-summer holiday periods, both accommodation and attraction businesses are feeling optimistic about 2014 as a whole being better than 2013.



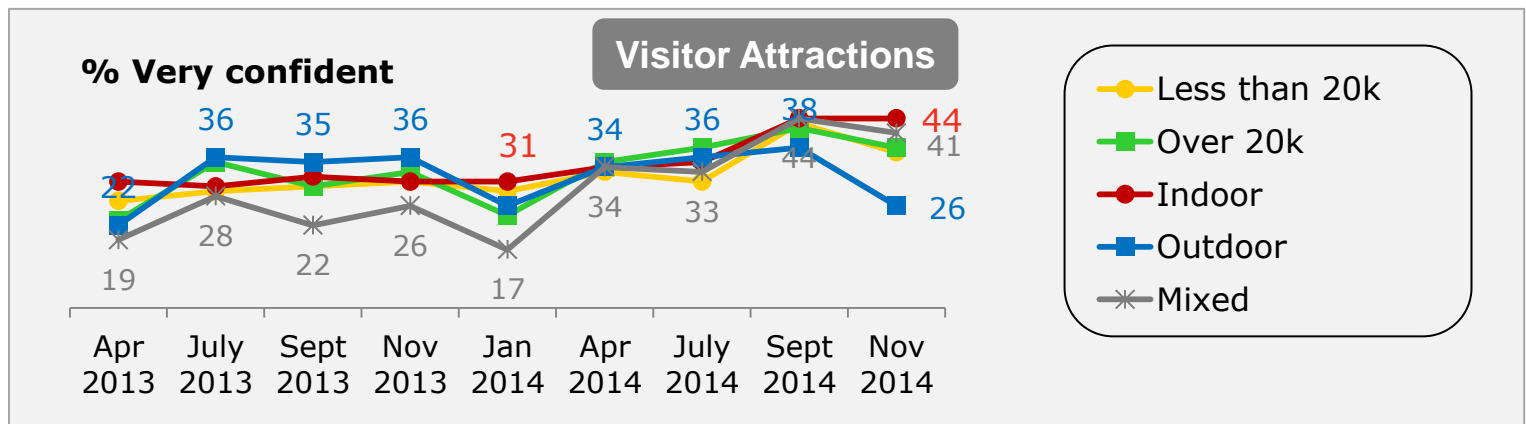
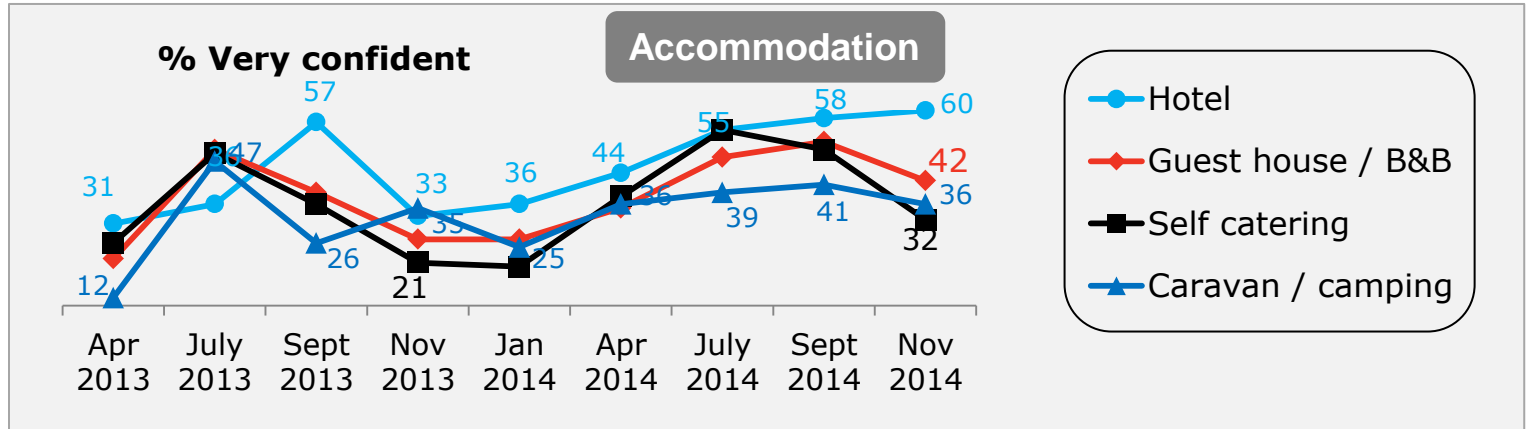
## Advance booking levels: Accommodation

Advance booking levels have dipped since the Sept '14 period but are higher than at this same time last year, when 14% of businesses said booking levels were very good compared with 21% this year.



# Confidence in performance for forthcoming period: By business type

Confidence levels remain strong following summer, although there has been notable drops among the more weather-dependent caravan/campsite and outdoor attraction businesses as we approach the colder winter months



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

## Positive verbatim comments on business confidence



*We have a good marketing campaign and Santa already booked up and the Christmas Market. Advanced bookings are good (Attraction)*

*Month by month we've been doing better so that should continue to the end of the financial year. Visitor numbers are up so spend per head goes up in the cafe and gift shop too. (Attraction)*

*We are fairly confident because we don't do a lot of business at the end of the year but we put on special events and advanced ticket sales are well up on last year already (Attraction)*

*I think it is going to be a good end of the year, strong performance - the economy seems to be improving, and we have a lot of conference guests booked in (Accommodation)*





## Negative verbatim comments on business confidence

“

*It will probably be slow because we don't have the weather and there is not so many visitors around (Attraction)*

*We've had the best weather for about 15 years but just no business. The money isn't there. We're discounting but still not working (Attraction)*

*Now coming into the winter season and numbers drop off. It happens every year and picks up around Easter time (Attraction)*

*The market is becoming much busier which makes it harder for us to compete (Accommodation)*

*. The weather is a big factor - if people think its going to snow they will cancel, and the potential of bad weather is much stronger in the upcoming weeks (Accommodation)*

”

