VisitEngland

Tourism Business Monitor

Easter 2012

bdrc continental

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.

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.

Easter 2012 fieldwork: 16-23 April 2012

Key Findings – Easter 2012 (1)

Difficult Easter trading, with higher proportions of both accommodation and attraction businesses reporting declines in visitors than increases compared with the same period last year.

- Hotels were more likely to have performed well than non-serviced
- Indoor attractions more likely to have performed well

The wetter, colder weather over that period compared with 2011 was a negative factor for many, although the earlier timing of Easter this year tended to be seen as a positive

Year-to-date performance more polarised, with visitor numbers much more likely to have increased for attractions than accommodation; many attractions perhaps benefitting from the unusually warm March. Business performance satisfaction levels also reflect this differential

Despite the challenging start to the year, business confidence for the Spring/Jubilee period is high. For accommodation, confidence is at similar levels to the same period last year

- Confidence much higher among the non-serviced sector, particularly caravan/camping
- Confidence among accommodation perhaps driven by strong advanced booking levels, with two-thirds reporting these as at least 'good'

Accommodation more likely to be reporting declines in domestic visitors for the year-to-date: perhaps also weather-related, with accommodation not seeing late bookings from this market

Attractions continue to see strong growth from local visitors

Key Findings – Easter 2012 (2)

Higher confidence in the non-serviced accommodation sector translated into more aggressive tariff increases for 2012, although even among this sector, half claim not to have increased prices at all

Historic attractions much more likely to have increased admission charges in 2012 than other attractions

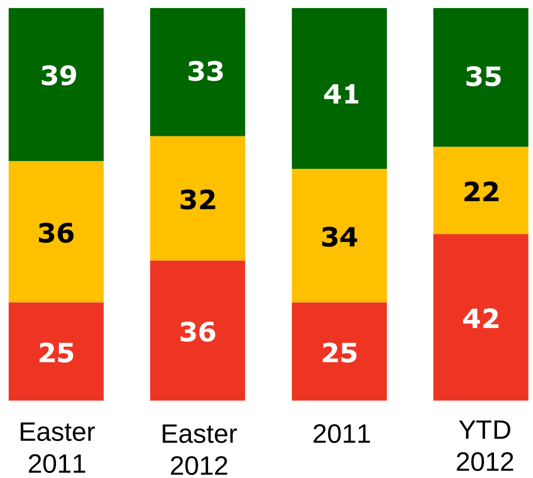
Still around a fifth of tourism businesses feeling positive about the impact of the Olympics, although a slight decline in positivity among accommodation and a slight increase among attractions at the Easter period

Positivity towards the Queen's Diamond Jubilee and extra Bank Holiday much higher than for the Olympics and continues to strengthen as the event approaches

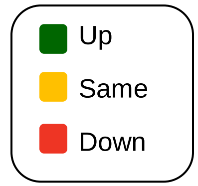
Business Performance Dashboard

Accommodation

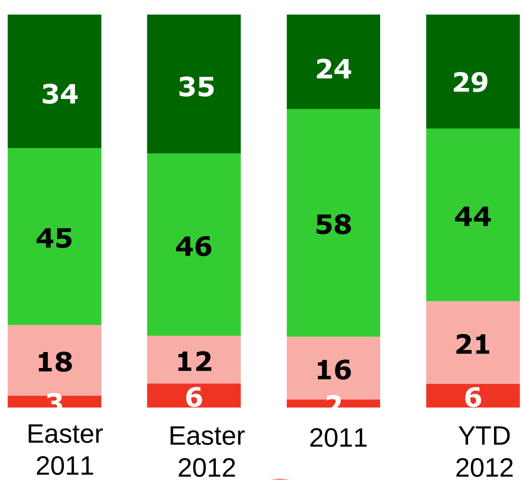
Visitor numbers (%)



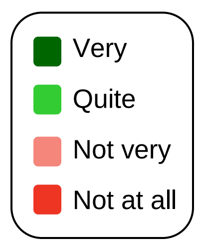
Versus same period previous year…



Satisfaction (%)

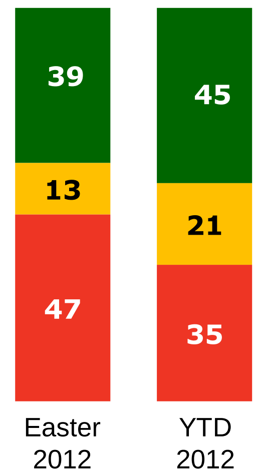


Satisfied …

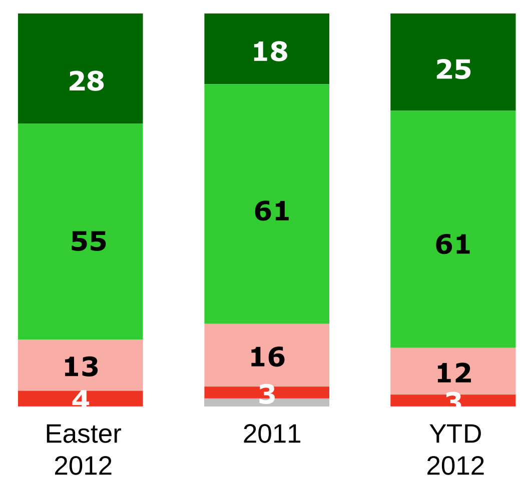


Visitor Attractions

Visitor numbers (%)



Satisfaction (%)



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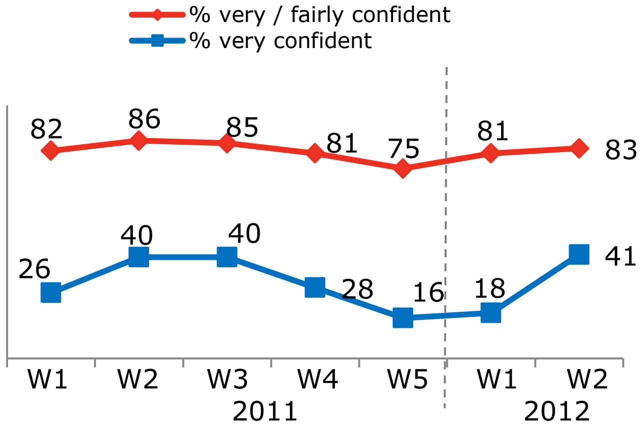
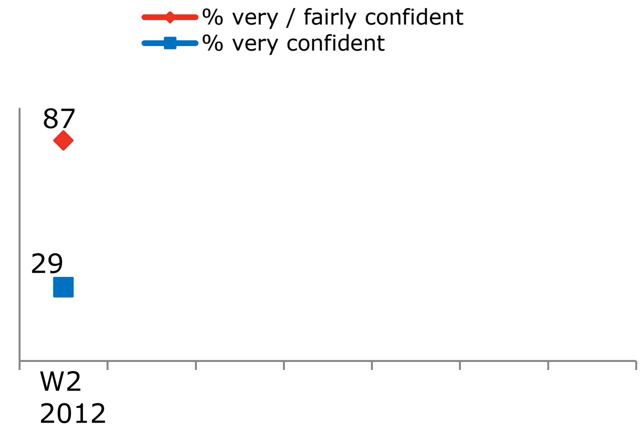
Business Confidence Dashboard

%

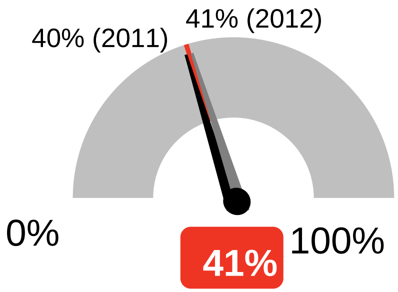
Accommodation



Visitor Attractions

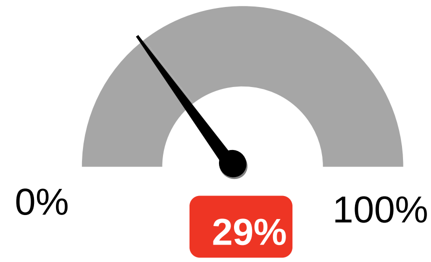


% very confident



2011: beyond Easter
2012: late spring / early June incl. Jubilee

% very confident

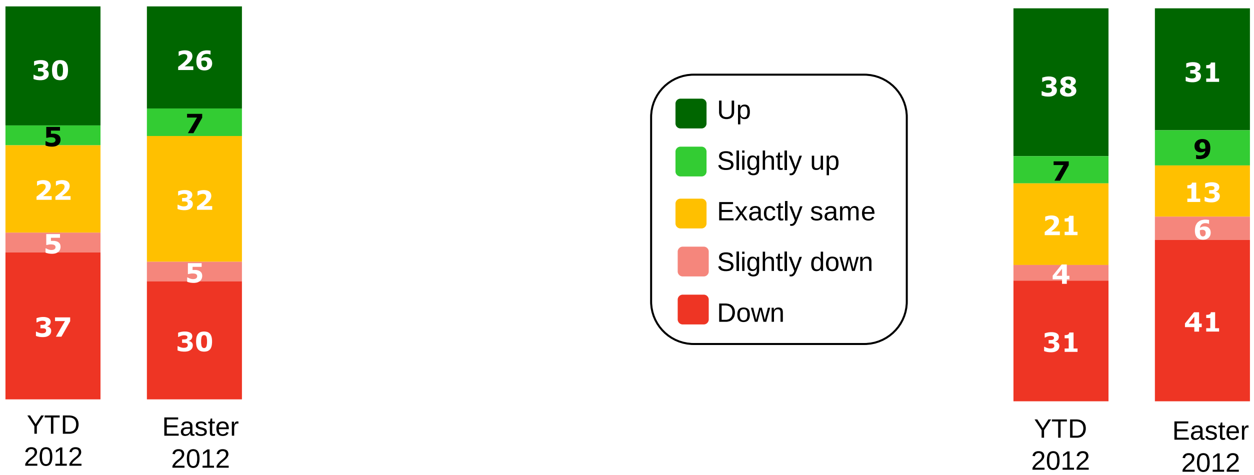


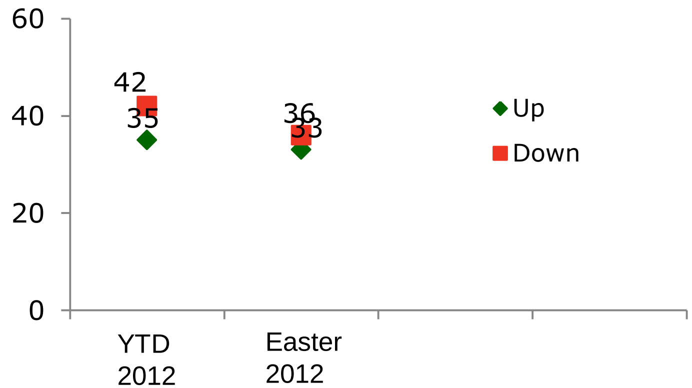
2012: late spring early June incl. Jubilee

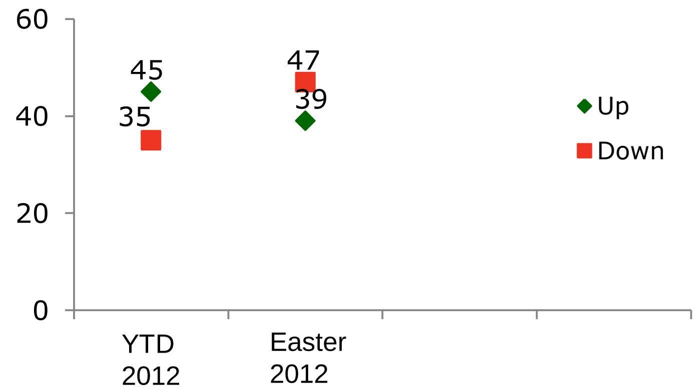
Visitor Numbers: Year-on-your changes (up /down)

Easter 2012 challenging compared with the same trading period in 2011, particularly for visitor attractions

Accommodation % **Visitor Attractions**







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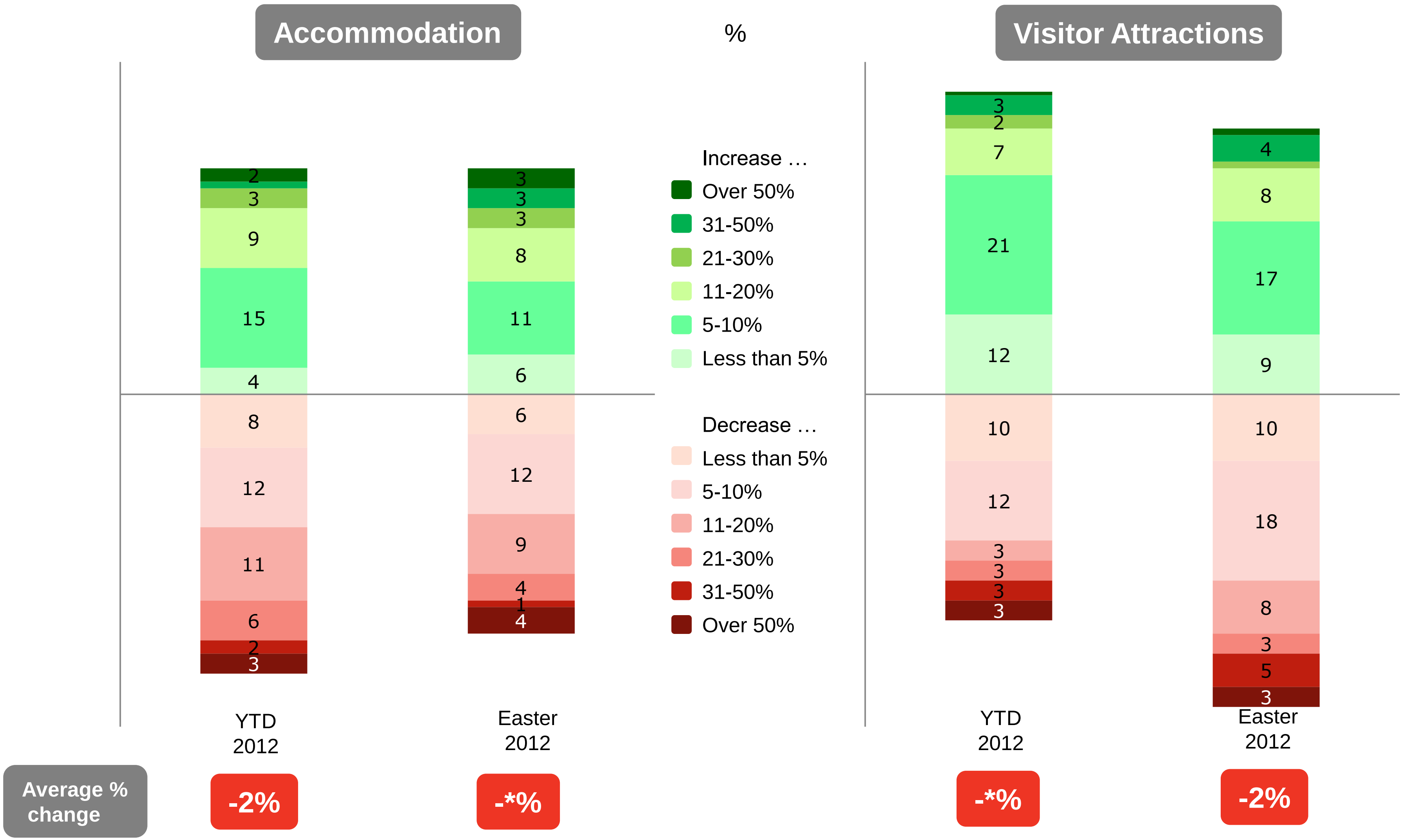
Visitor Numbers: Year-on-year changes (%)

Visitor numbers more likely to have decreased than increased so far in 2012 for accommodation and attractions



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Positive verbatim comments on business performance

Easter has been earlier this year. Last year Easter was later and it was too hot (Attraction)

We had a temporary exhibition that we got good exposure (Attraction)

Opening new outdoor shop and restaurant on the 28th march had a big impact (Attraction)

It is not necessarily due to economic growth - they seem to be just more confident about their finances in general and will spend more this year (Attraction)

We have put on more events. People went away last year for the Royal Wedding (Attraction)

Events/ family days and more guided walks (Attraction)

Because we've re-done the whole park, its been renovated and added new attractions (Attraction)

We've had loads of conferences this year and some fell into the Easter (Accommodation)

People are tending to have several smaller breaks rather than a big holiday and Whitby is known as being a location for smaller breaks so that impacted Easter. I have also noticed that people are booking later than before - I don't know why, maybe they are waiting to see how things are economically (Accommodation)

We have a better, improved and upgraded website. We are doing quite well because we have very good agents who got people in for Easter (Accommodation)

It's repeat bookings and the fact that we've got a good reputation. Word of mouth from friends who have been before (Accommodation)

Easter fell on a good spread during April between 2 half terms/ and bobs ya uncle it makes a difference!! (Accommodation)

Negative verbatim comments on business performance

The weather was cold and wet and people stayed at home its as simple as that (Attraction)

Weather/ it was purely that/ nothing else I can say (Attraction)

Well I guess the state of the economy, the weather for us, fuel costs. I think it's just showing in terms of secondary spend on site (Attraction)

The fuel drivers strike. Visitors didn't want to venture out to rural areas not being able to get any fuel. Also we are weather dependent - good weather brings more visitors. Also the domestic economy and road fuel prices (Attraction)

A lot of people are out of work at the moment, obviously the petrol scare at that particular time (Attraction)

Weather and a major competitor having some product development within the region had an effect (Attraction)

The economy; people are scared about being made redundant and not staying as long (Accommodation)

People react to the cold weather, they don't book. If the sun comes out they start booking (Accommodation)

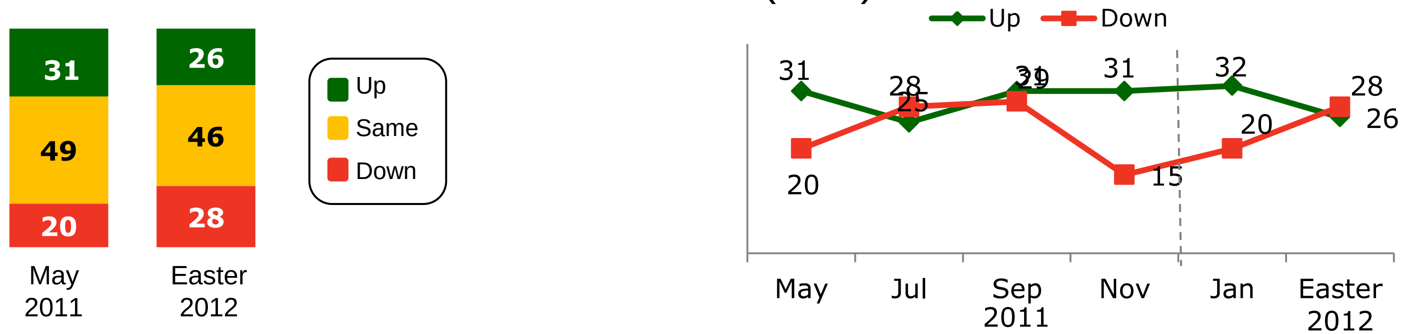
We have a lot of European visitors and because of the economy at the moment and problems with the Euro. They're not booking so far in advance as they used to. It's a lot more short term last minute bookings, a lot more precarious than it used to be (Accommodation)

People are booking on sites such as lastminute.com and they take up to 15% of the profit (Accommodation)

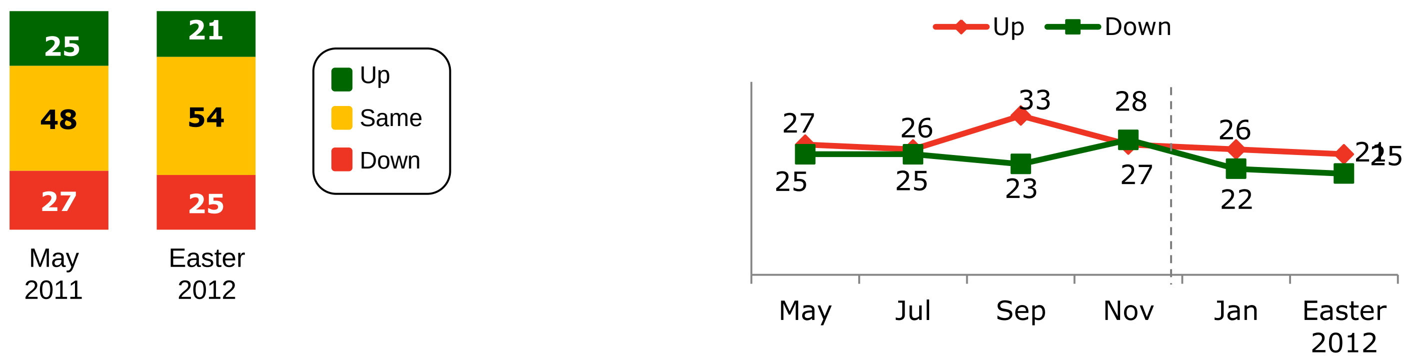
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

%

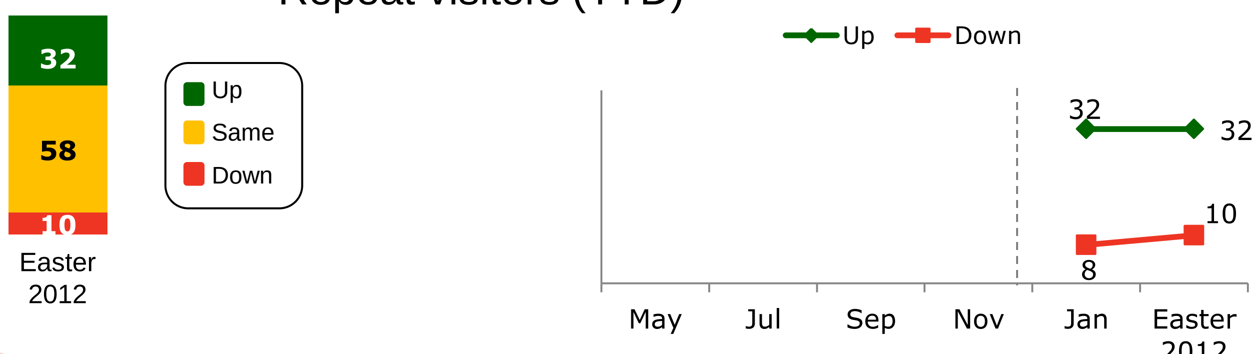
Domestic visitors (YTD)



Overseas visitors (YTD)



Repeat visitors (YTD)



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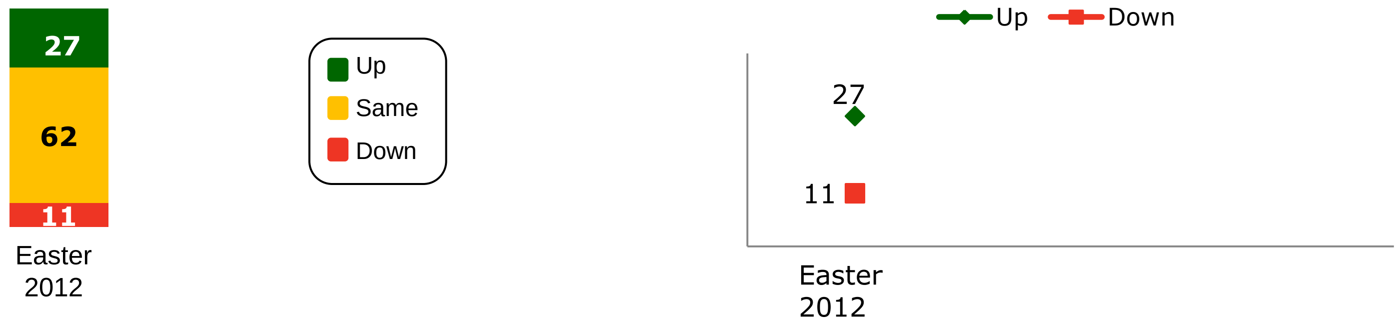
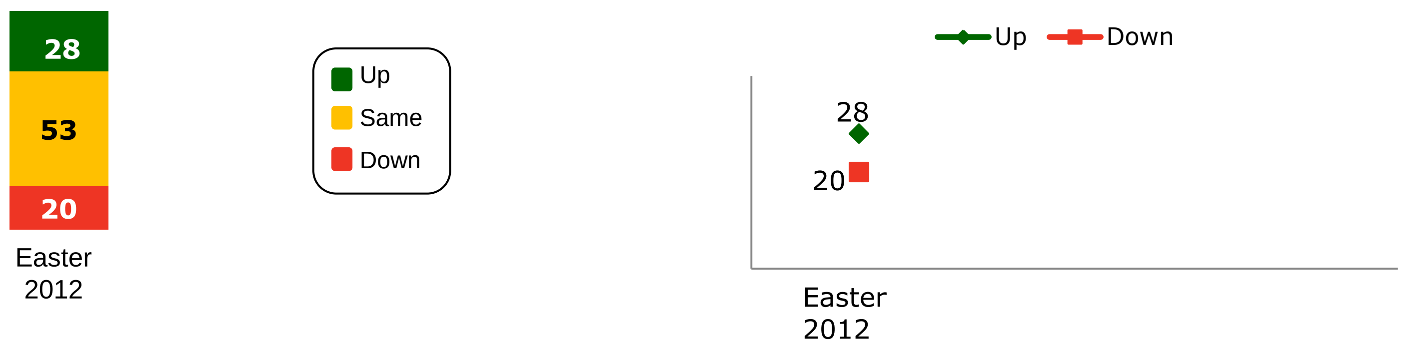
Changing Visitor Profile (year-to-date vs. previous year): Visitor attractions

%

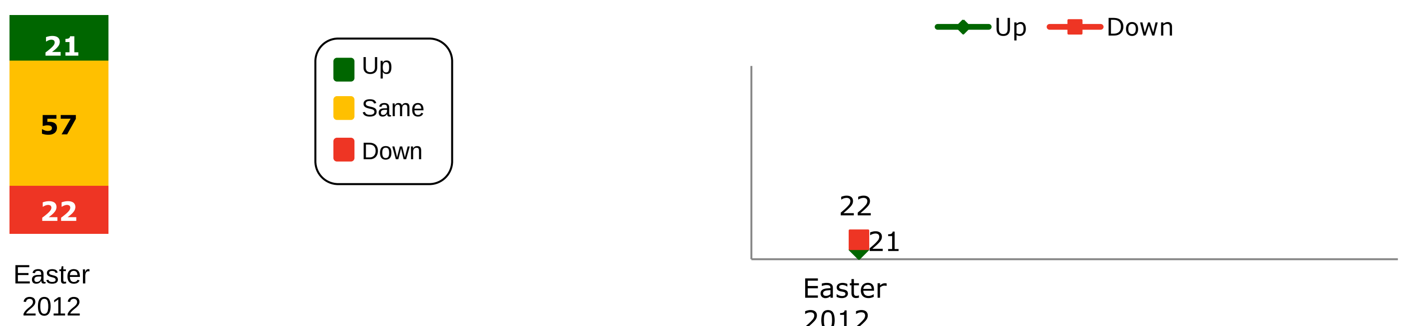
Visitors from immediate locality(YTD)



Other domestic visitors (YTD)



Overseas visitors (YTD)



Changing Business Performance : By business type

Hotels and indoor attractions most likely to have seen their Easter 2012 visitor numbers increase

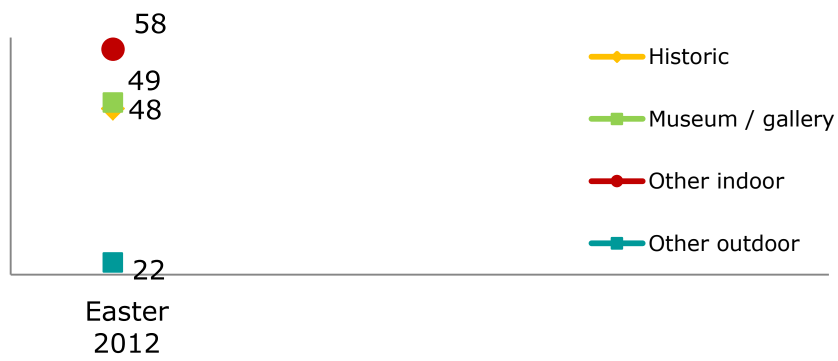
Accommodation

% Visitors up on last year

% Very satisfied

Visitor Attractions

% Visitors up on last year



% Very satisfied

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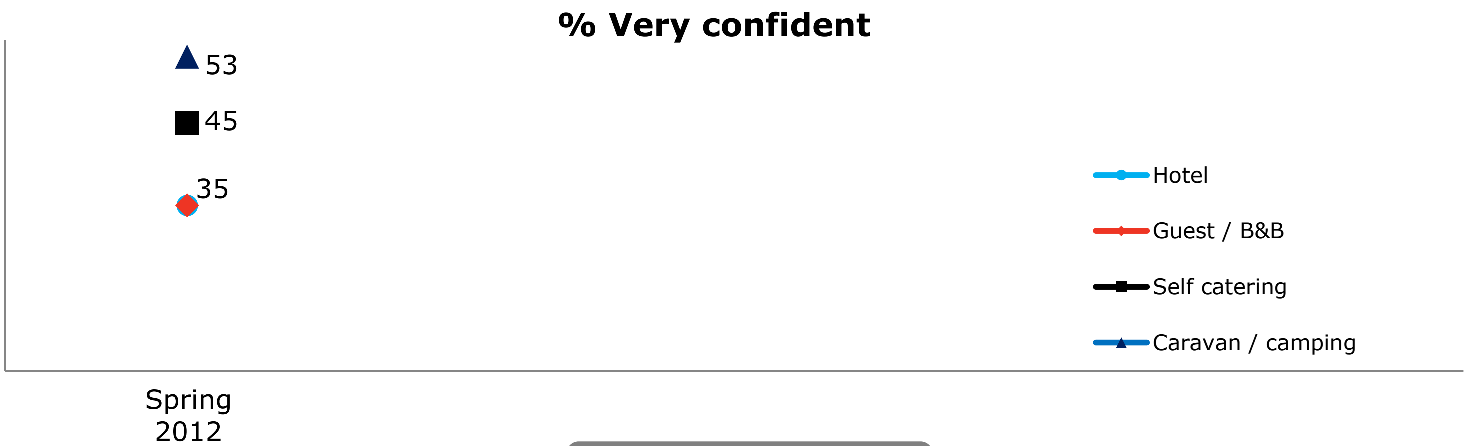
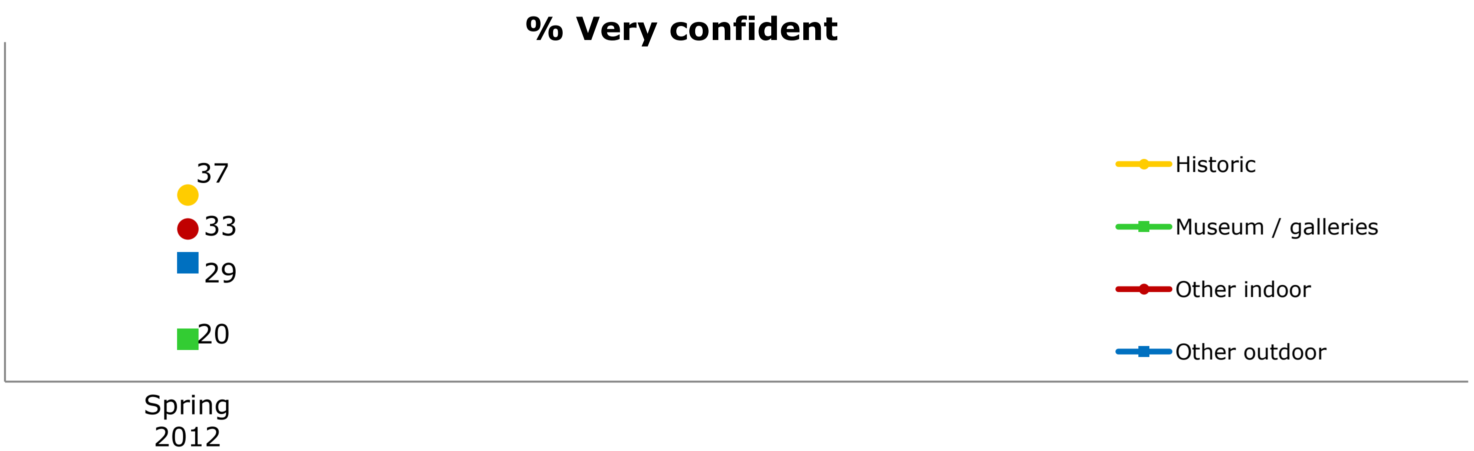
Confidence for forthcoming period

Caravan/camping and hotel accommodation most confident for the late Spring/Jubilee period, along with historic attractions

Accommodation



Visitor Attractions



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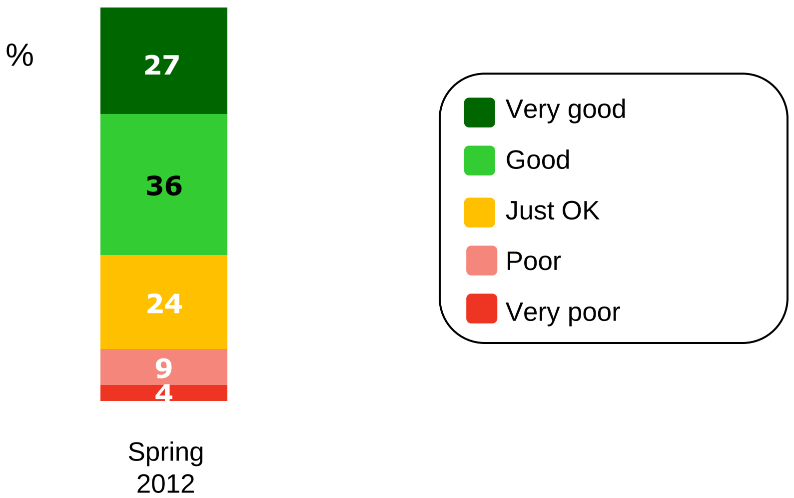
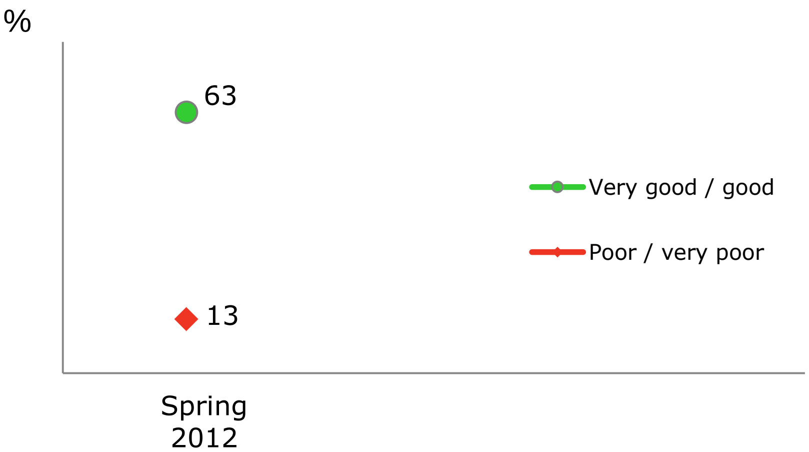
Advance booking levels: Accommodation

Advanced booking levels for accommodation looking positive for the late Spring/Jubilee period, with two-thirds feeling these are at least 'good'





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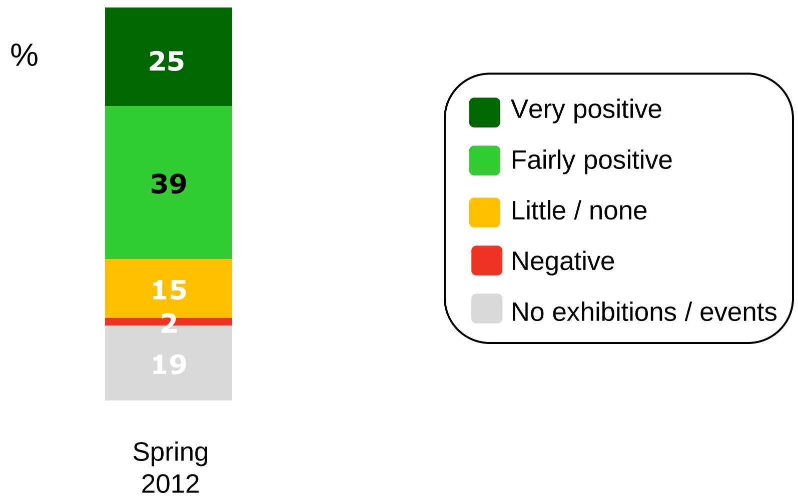
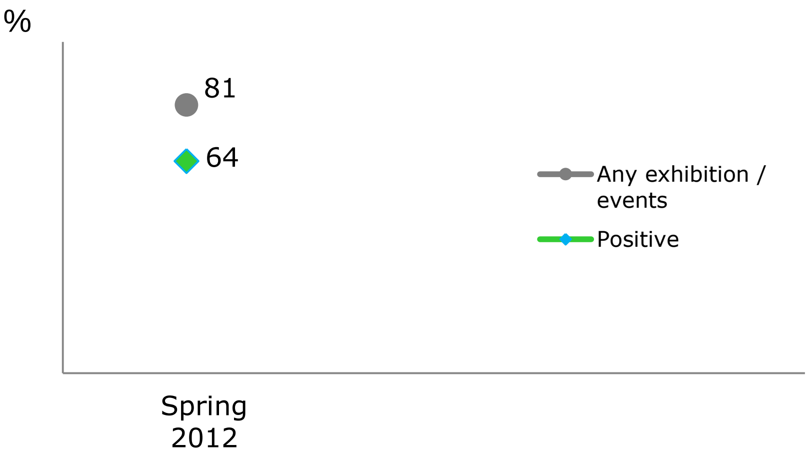
Impact of exhibitions / events: Visitor attractions

Importance of exhibitions/events for attractions continues to be demonstrated, with 81% putting these on for the late Spring/Jubilee period and two-thirds feeling positive about their impact





Positive verbatim comments on business confidence

People are more confident and there have been more enquiries and bookings compared to last year (Attraction)

We were having a really good year up until the weather change. Easter spoilt it but that was because of the weather change. If the weather gets progressively better we will have a good spring and summer (Attraction)

We have good events coming up - the festival of British archaeology, tours, talks, large family events, craft activities, re-enactments - they should all serve us well (Attraction)

We have two large investment programmes and new exhibitions for our site. We're doing Jubilee beacon for the Queens Jubilee and plus our normal events programme (Attraction)

We have been fortunate to be part of Visit England and Visit Kent campaign. The Judy Dench Video has really helped. The overseas campaign has also been going very well (Attraction)

Well because the effect of the Jubilee, the number of bookings has been quite optimistic, so it makes us think that it will continue (Accommodation)

Hopefully, because of the Olympics and the Queen's Jubilee, it will at least remain the same as last year (Accommodation)

Because of the special offer we are offering throughout the year (Accommodation)

The weather usually dictates business so if the weather is good business will be and if its bad then business will be bad (Accommodation)

Business and business market is stronger and customer smay stay at home rather than going abroad (Accommodation)

Negative verbatim comments on business confidence

Because of the financial climate in general. I'm not sure people will come over to the island because I don't think they'll have enough money to spend (Attraction)

The price of petrol will affect our numbers. Half of our visitors are from regional conurbations and they are visiting places close to them (Attraction)

I am still waiting to see if the government is going to start taxing donations. This would affect us because of our charitable status (Attraction)

Petrol prices could have an effect on us because we are in the countryside (Attraction)

If people have tickets for Olympics or the Jubilee they won’t want to attend to us whether we are free or not. They won’t have the money for extra petrol - petrol prices are ridiculous and with the Olympics there isn't spare money for anything else (Attraction)

People are going to have a rude awakening. This year will be the worst for many years for many of us. I feel that it's going to get worse each year from here on in until the overall economic situation is address worldwide (Accommodation)

If there's any changes in tax. There was a move last year to change the tax. I'll make less profit, I may sell out and start something new (Accommodation)

People are asking for discounts this year, where they didn't before. I think it's a general trend this year where so many businesses are doing it that people have become accustomed to asking for it (Accommodation)

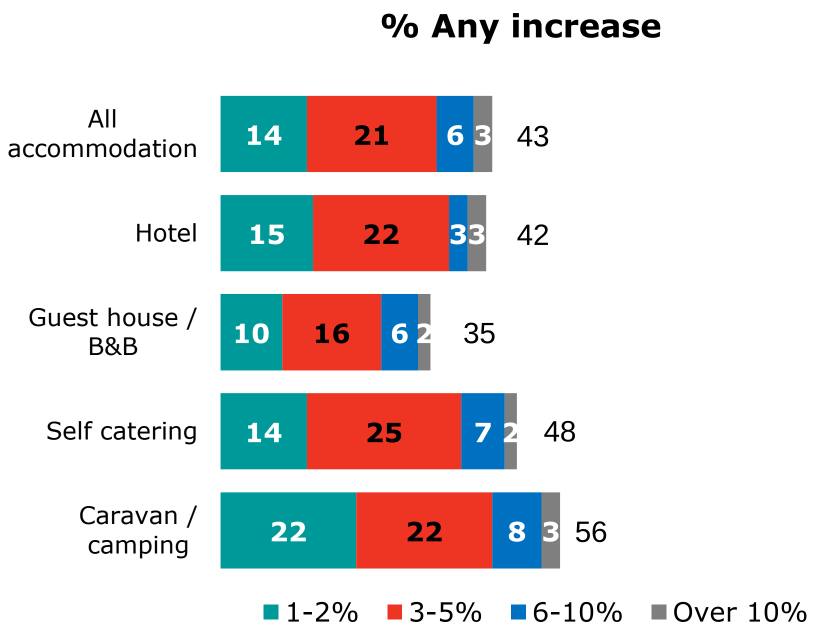
People don't want to spend as much. They would rather have midweek as its cheaper. They'd rather have a shorter cheaper stay (Accommodation)

Fuel, its just too expensive. Towing caravans is too expensive so I don’t know what will happen later on down the line it depends on then petrol situation (Accommodation)

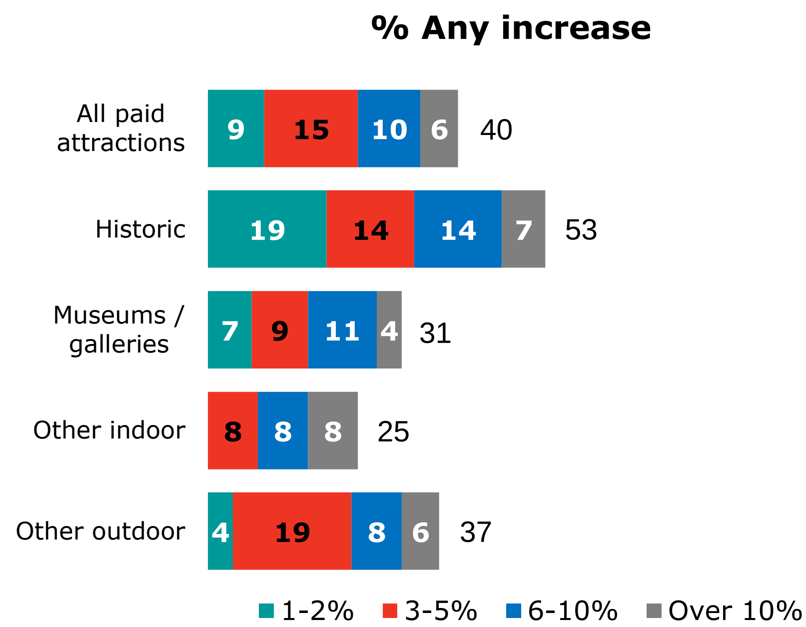
Changing admission charges / tariffs in 2012 compared with 2011

Less than half of accommodation and attraction businesses claim to have increased tariffs/admissions charges for 2012. Non-serviced accommodation and historic attractions most bullish over pricing

Accommodation



Visitor Attractions



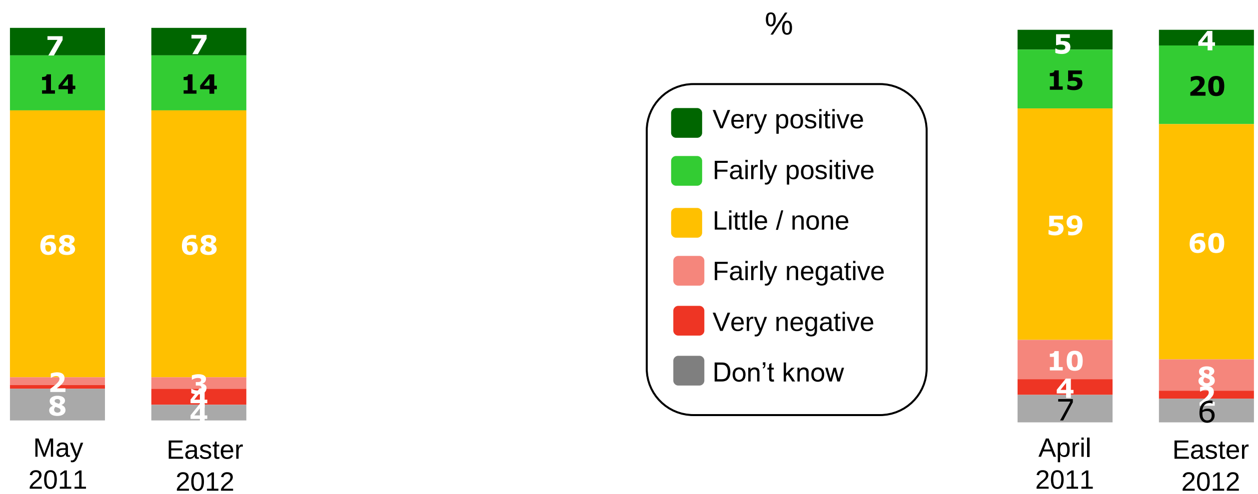
N.B. Base: All attractions charging for admission

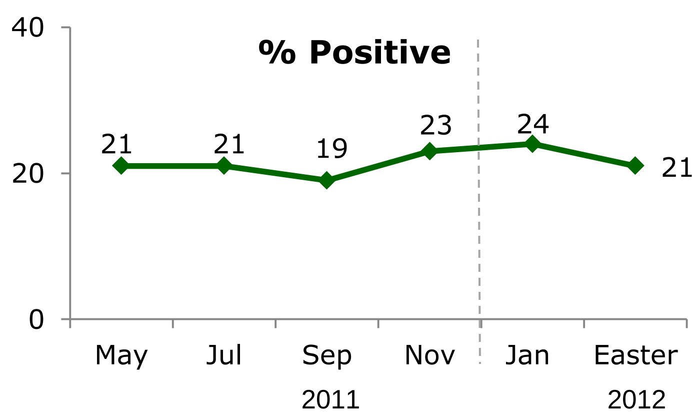
Impact of 2012 Olympics

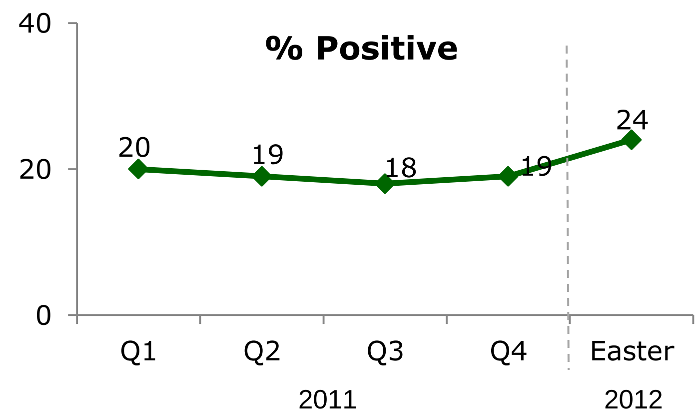
Little change in positivity towards the Olympics among accommodation; slight increase among attractions

Accommodation

Visitor Attractions



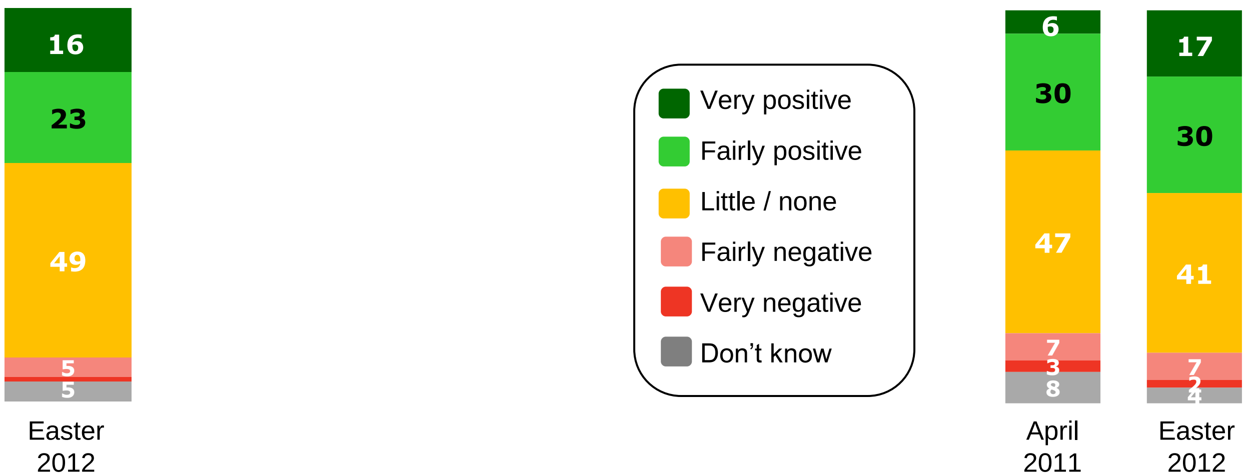


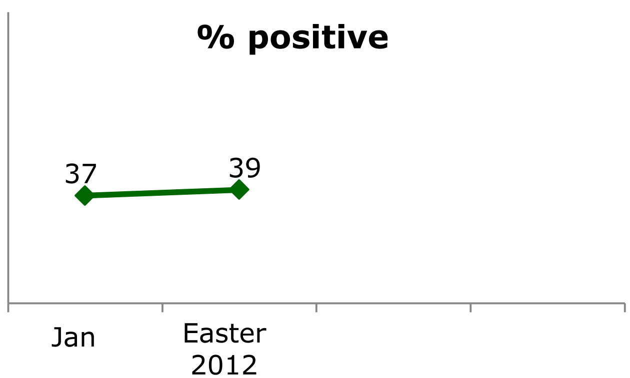


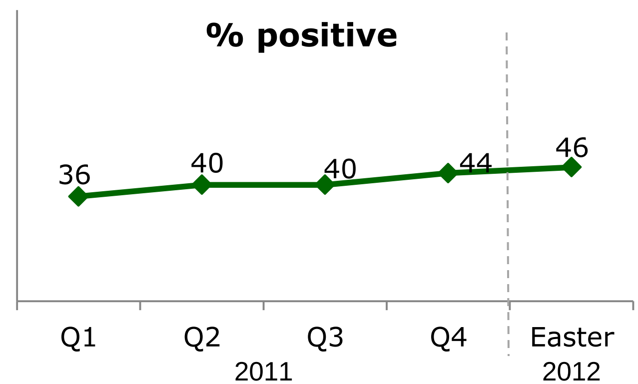
Impact of Queen's Diamond Jubilee and extra Bank Holiday

Increasingly positive attitude towards the Jubilee and Bank Holiday period as the event approaches

Accommodation % **Visitor Attractions**







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