Tourism Business Monitor

Wave 5 – Post October half term

Contents

VisitEngland

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.

Fieldwork dates:

Nov 2012: 5-12 Nov 2012, reviewing mid-September until the end of the October

Sept 2012: 10-17 Sept 2012, reviewing the school summer holidays

July 2012: 16-24 July 2012, reviewing the period after the Jubilee bank holiday weekend until mid July

June 2012: 11-15 June 2012, reviewing May/ early June period, including Jubilee Bank Holiday weekend.

Easter 2012: 16-23 April 2012, reviewing January to April period

November 2012 Key Findings

In September we saw early signs that our industry may be turning a corner. Two months on business performance is continuing to improve for both accommodation and attractions markets, with visitor numbers now only marginally down on the same period last year (net change of -3% for accommodation; -1% for attractions).

Admissions have improved across all audiences and business types, especially amongst domestic visitors, with hotels and smaller attractions showing most improvement. Despite this, there is limited change in satisfaction levels – has post Olympics business failed to live up to expectations?

The attractions market has shown continued growth in confidence since July, with 85% now very/ fairly confident about their outlook for the rest of the year. This is stronger amongst indoor attractions, reflecting the season.

Confidence amongst accommodation businesses has fallen back since September, from 82% to 73% very or fairly confident. This is dragged down by non-serviced accommodation, which has limited advance bookings until the end of the year.

We enter 2013 with some trepidation, with only 65% of attractions and 51% of accommodation businesses feeling confident about their outlook. However, the early signs of recovery are continuing to sprout, so we can feel cautiously positive for the year ahead.

Olympics boosts UK economy
BBC News, Oct

VisitBritain launches China Mission
E-tid, Nov

'Big British Invite' goes out to the world
E-tid, Nov

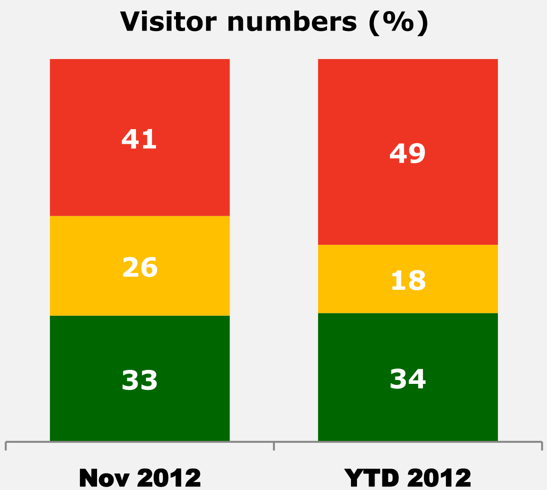
No sign of post-Olympic slump at London hotels
E-tid, Oct

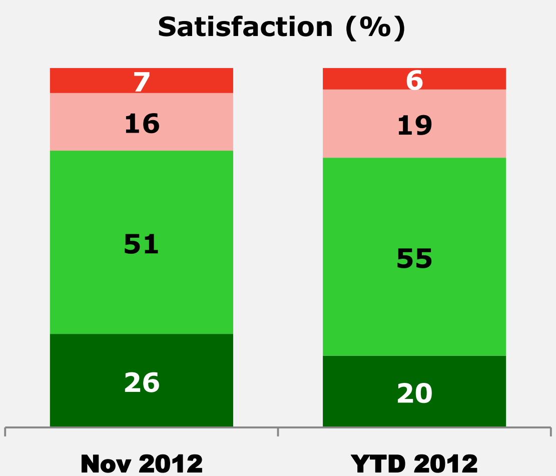
Business Dashboards

bdrc continental

Business Performance Dashboard

Accommodation





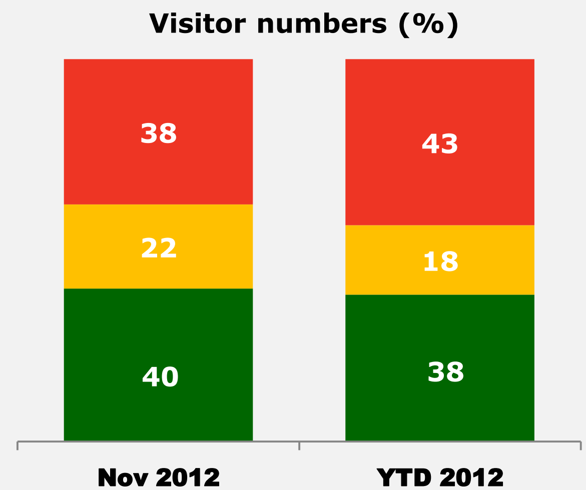
Versus same period previous year…

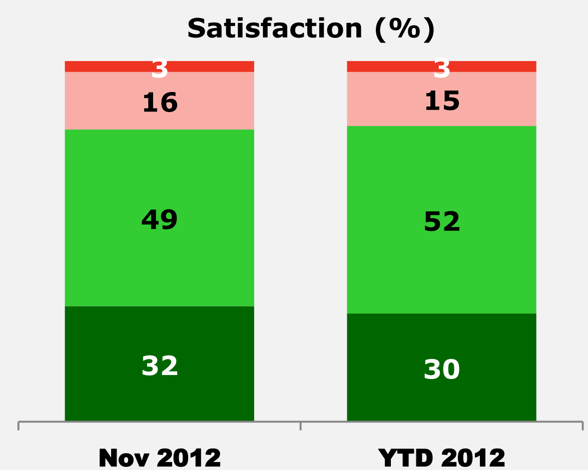
- Down
- Same
- Up

Satisfied with business performance…

- Not at all
- Not very
- Quite
- Very

Visitor Attractions





PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2012 Mid-Sept until the end of October

VisitEngland

bdrc continental

Q3/4. Q7/8, Q6 & Q10

Business Confidence Dashboard: confidence for next 1.5-2 months

Period asked about:

Survey conducted:	Period asked about
Easter 2012	Until after Jubilee bank hol
June 2012	Until start of summer hols
July 2012	Until end of summer hols
Sept 2012	Until end of October
Nov 2012	Until the end of the year

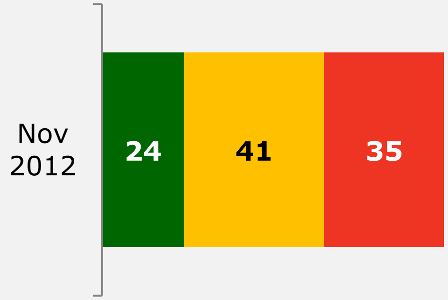
Q13

Visitor profile

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

Up | Same | Down

NET: Up - Down



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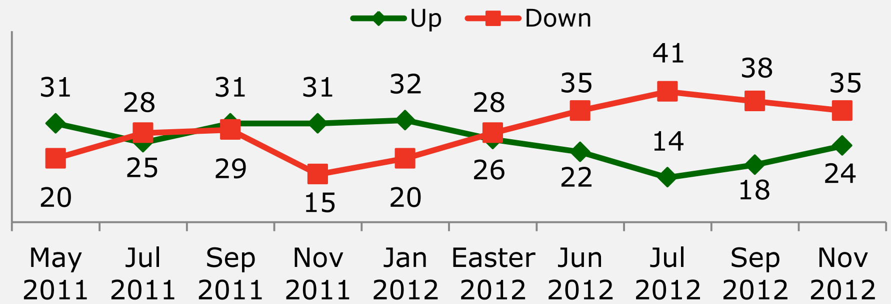

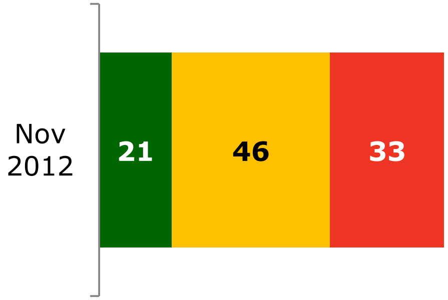

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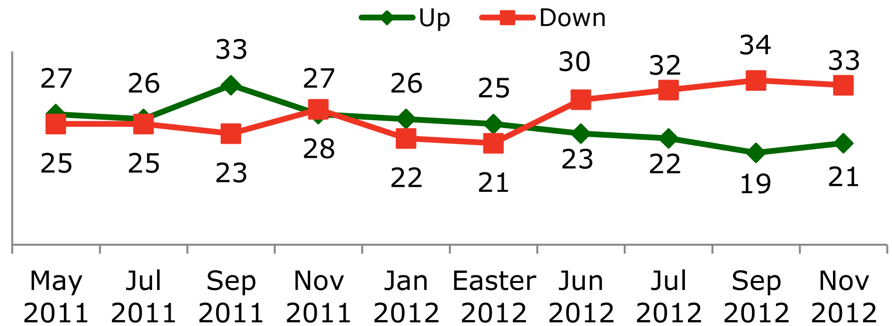

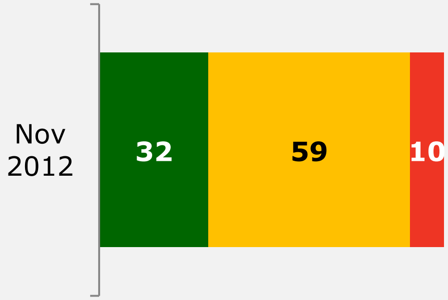

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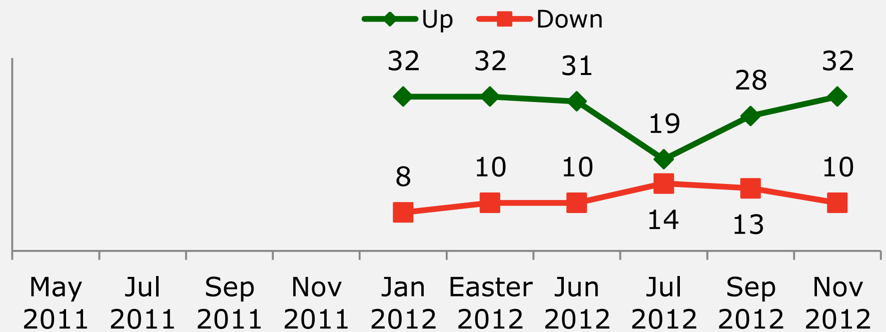


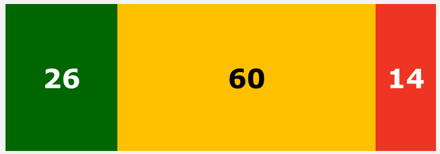
Q12

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

Up Same Down

NET: Up - Down

Nov 2012



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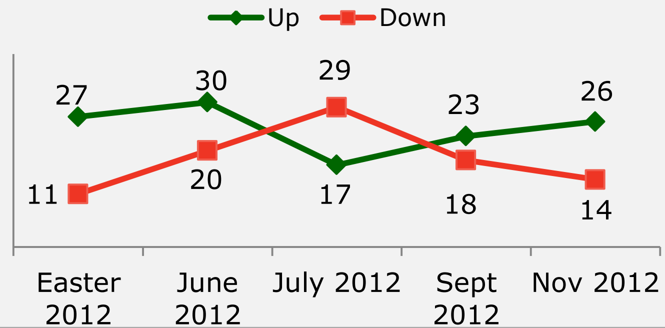
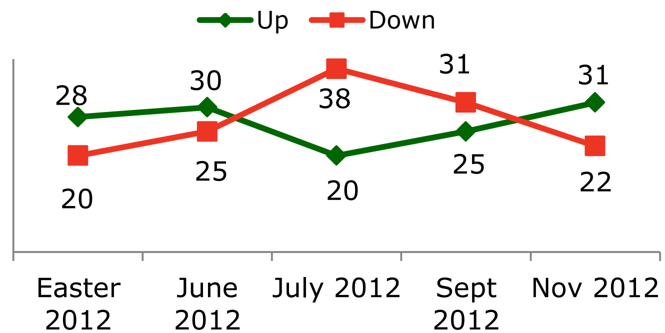
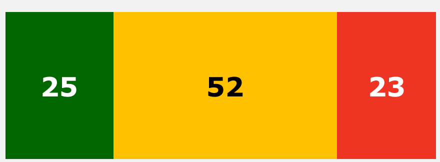


Nov 2012

+9



Nov 2012



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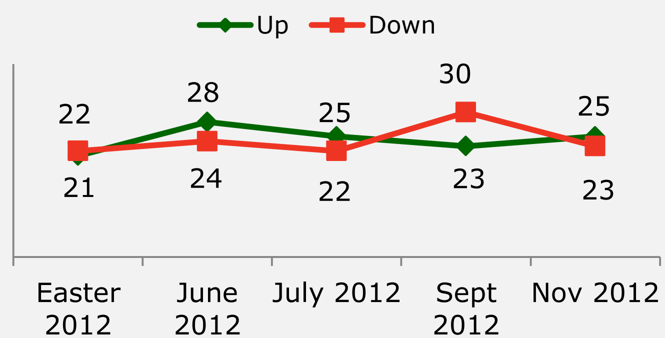
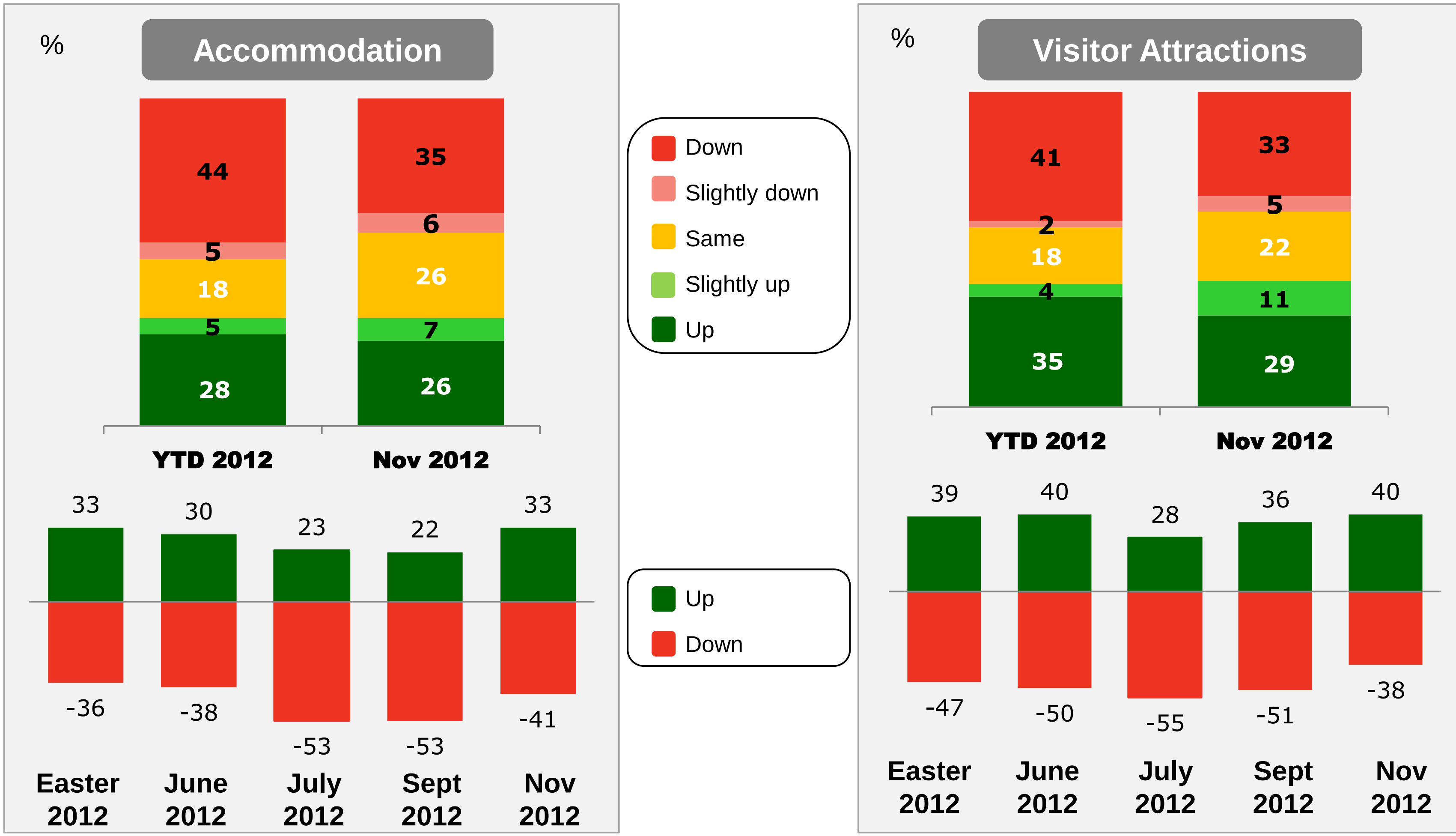


Business performance

bdrc continental

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

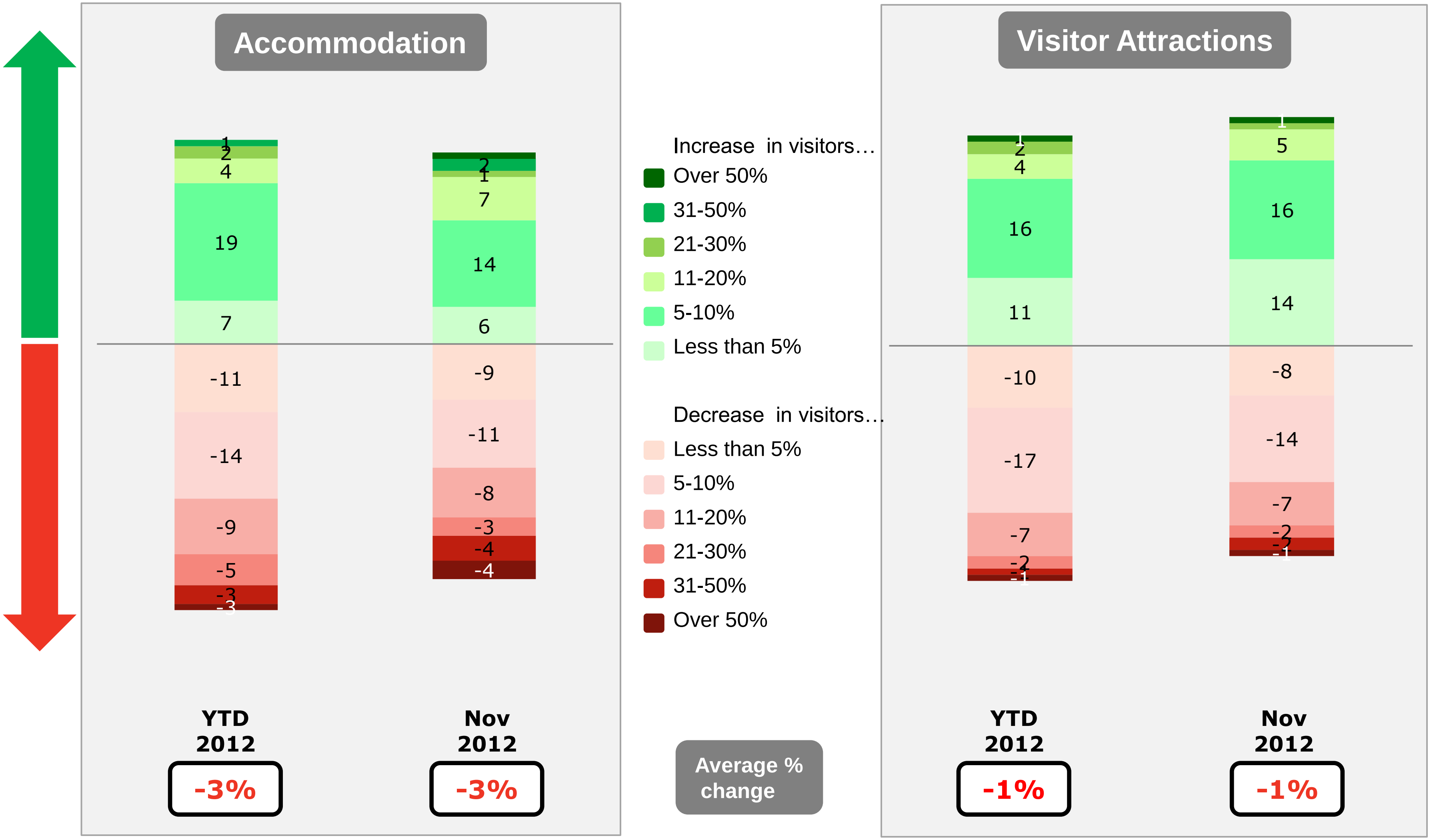
Both accommodation and attractions are starting to show signs of recovery, from the low in July. However, there is still a long way to go, particularly for accommodation businesses who as an industry still performed worse than last year.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2012: Mid-Sept until end of October/ **Sept 2012:** School summer holidays/ **July 2012** Jubilee bank holiday weekend until mid July/ **June 2012:** May and early June until after Jubilee Bank Holiday/ **Easter 2012:** January to April period

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

The net year on year change remains negative, but only marginally so for the post summer period.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2012 Mid-Sept until the end of October

VisitEngland

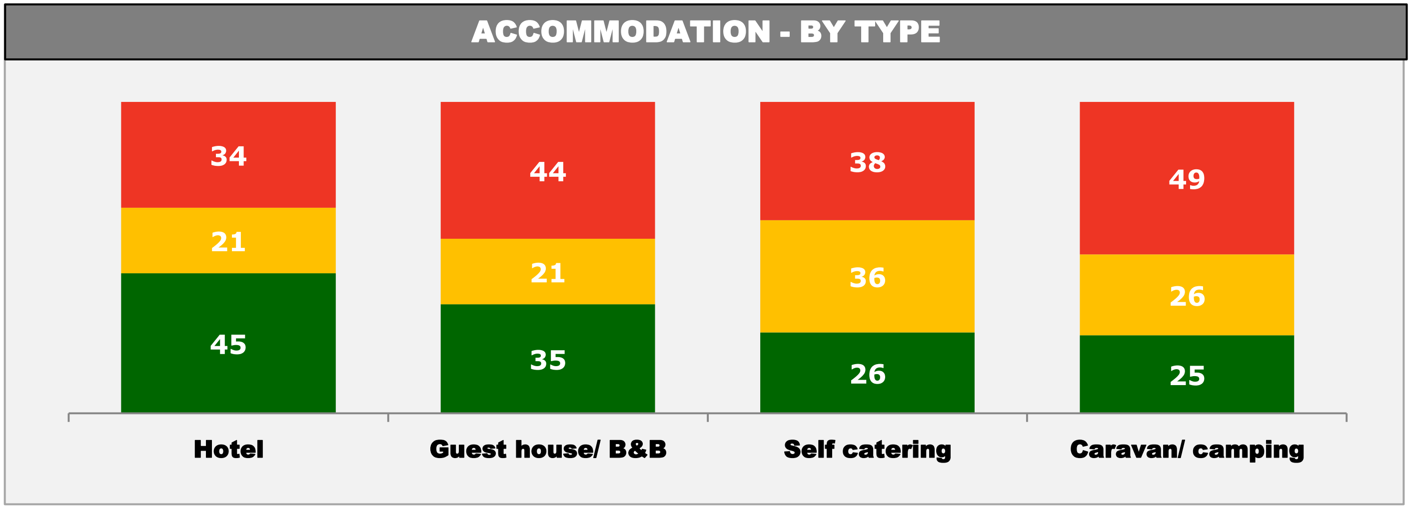
bdrc continental

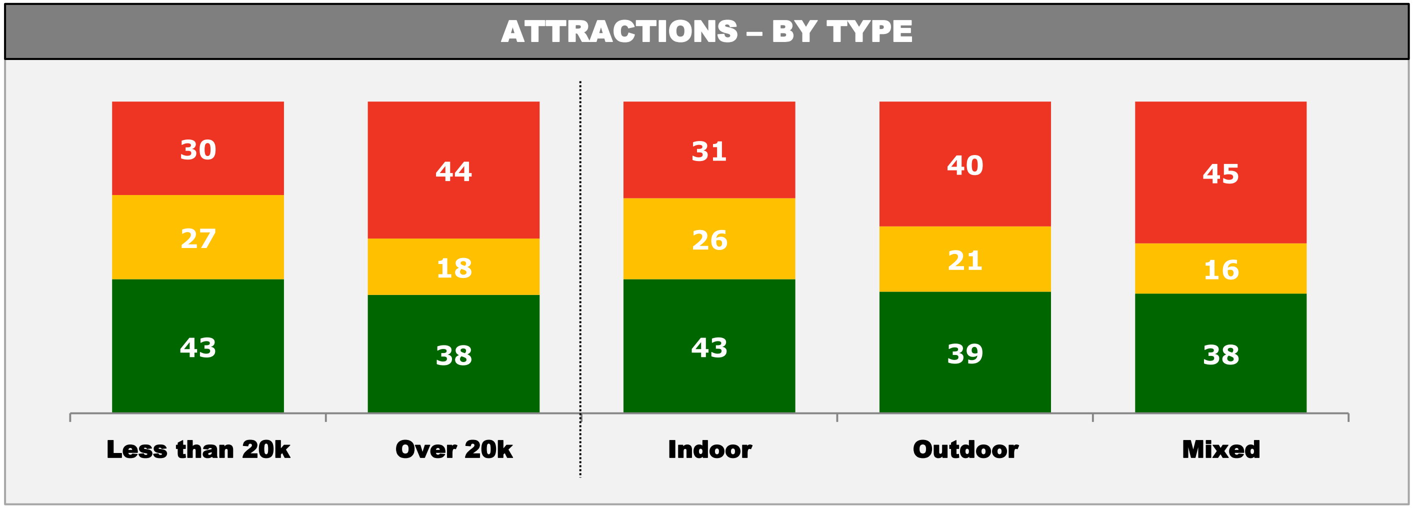
Q9, Q5

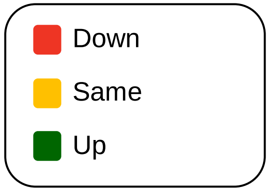
Changing business performance: By business type

The caravan/ camping sector is unlikely to recover this year, with half of businesses still reporting a decline on last year's performance. B&B and larger businesses are also struggling, but the hotel industry is now showing growth.

Versus same period previous year…



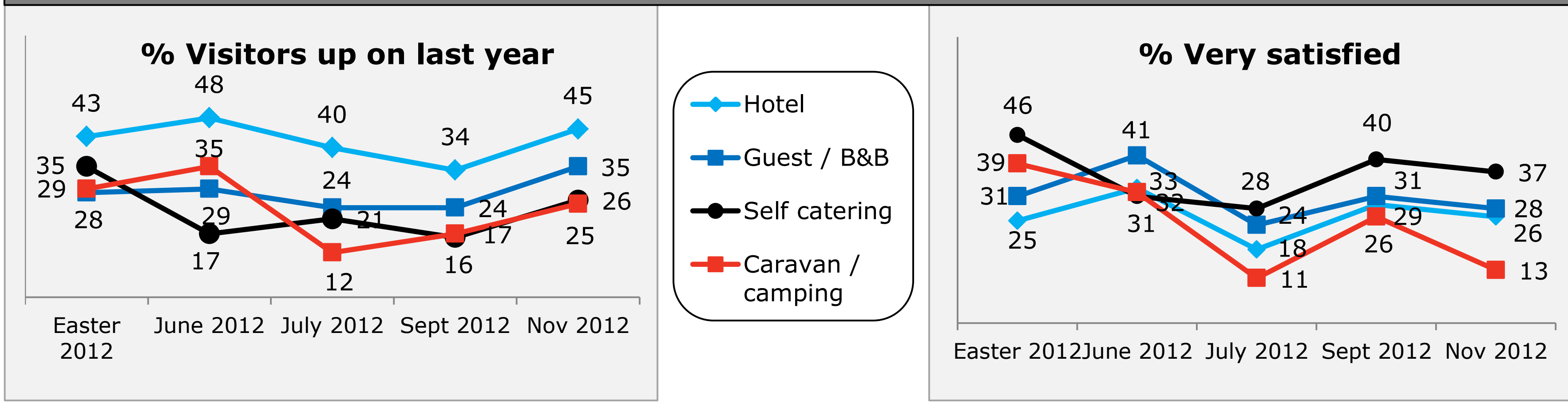




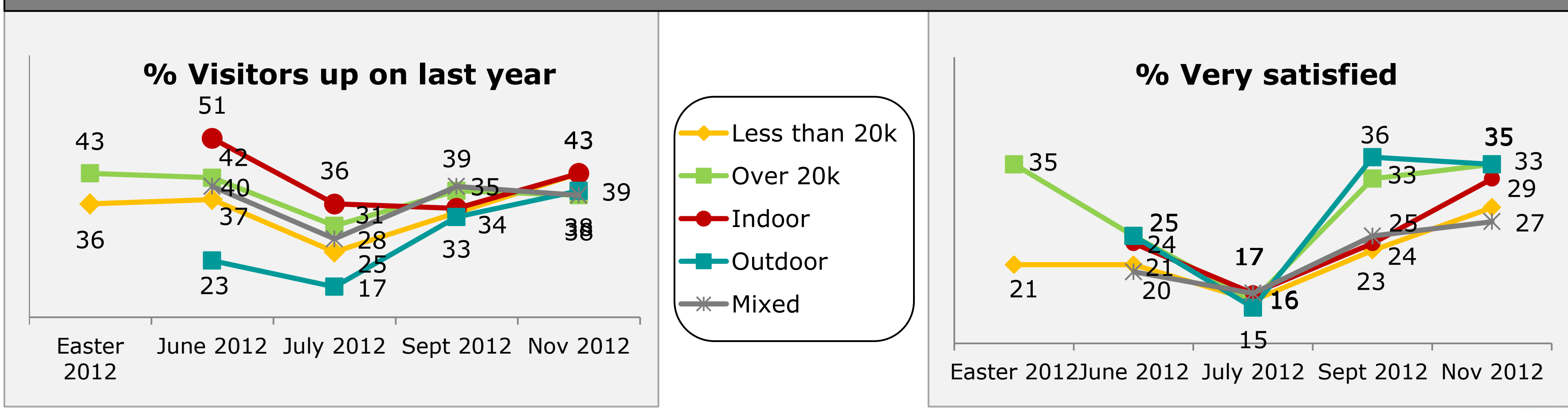
Changing business performance: By business type

Business is up pretty much across the board, but not so for satisfaction. Only indoor and sub 20k visitor attractions are more satisfied with their performance than in Sept. Has post Olympics business failed to live up to expectations?

ACCOMMODATION - BY TYPE



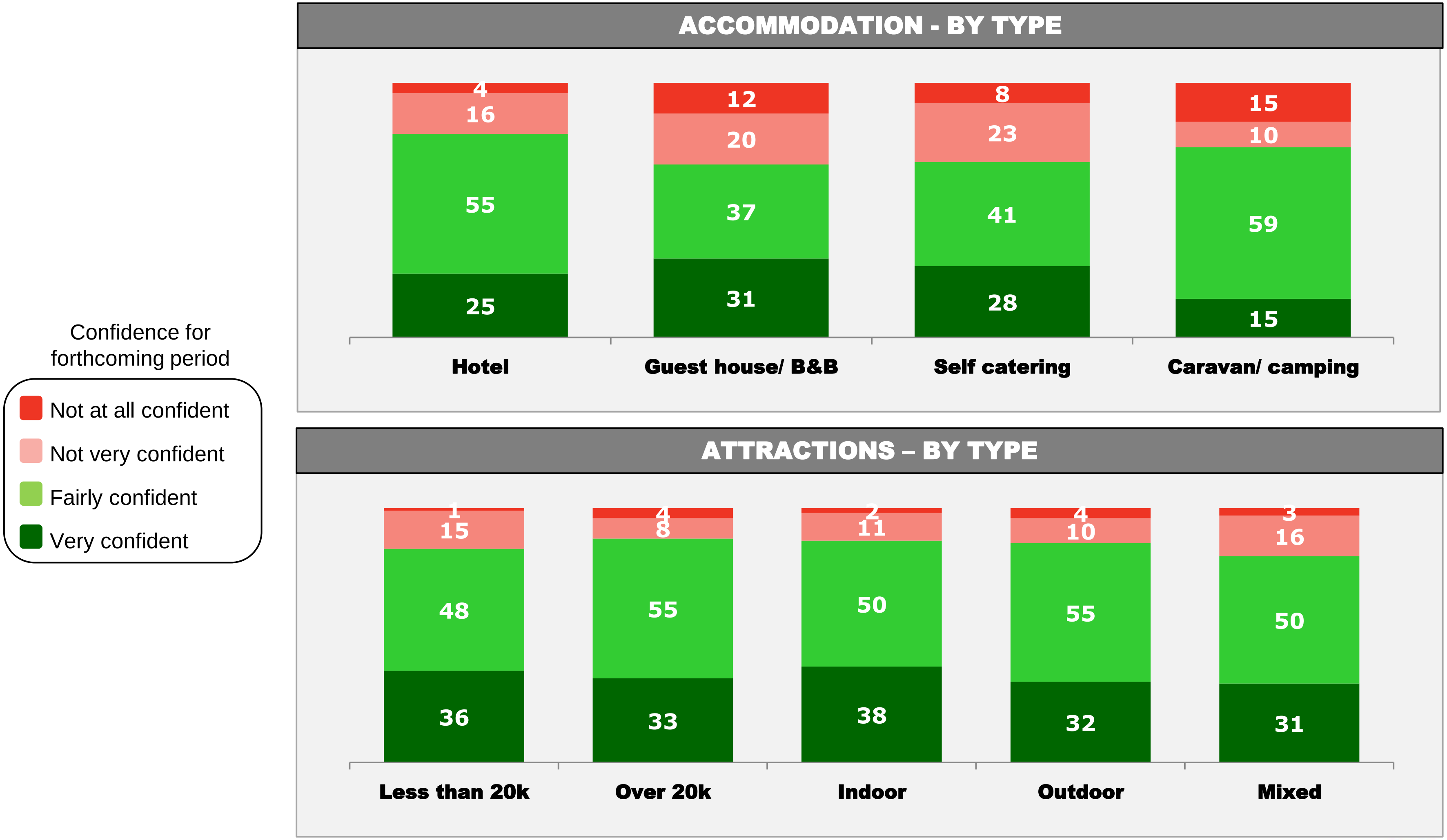
ATTRACTIONS – BY TYPE



Business confidence

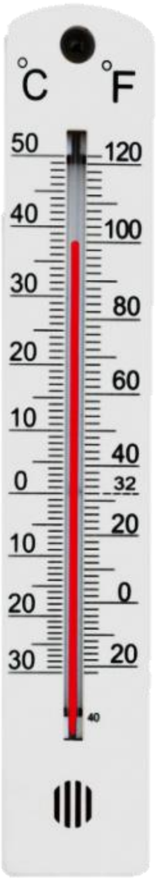
Confidence in performance for forthcoming period: By business type

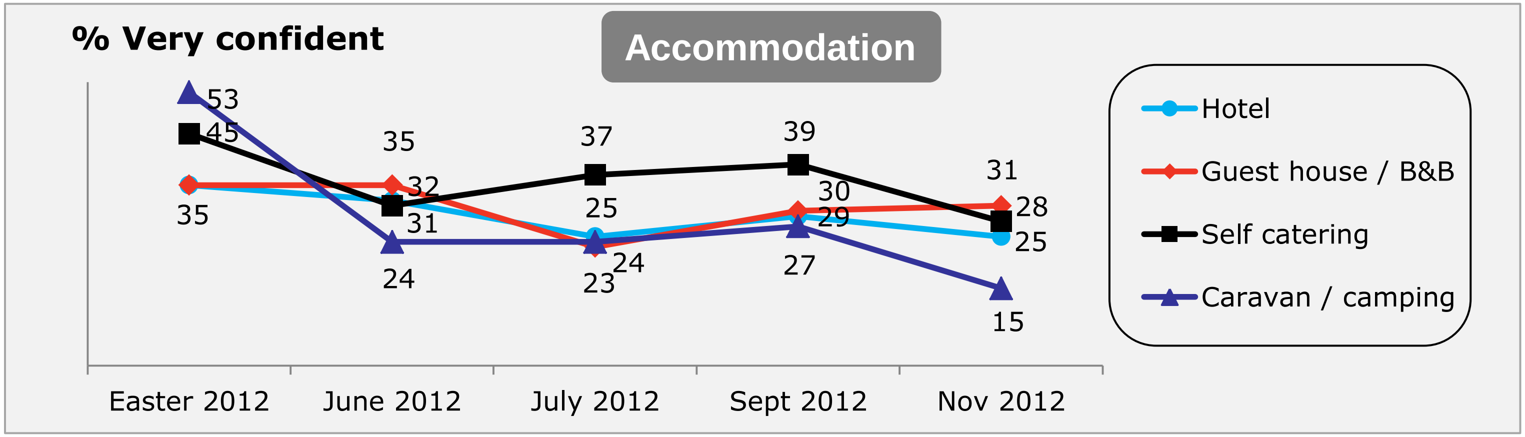
The sector remains confident looking forwards, although this is fairly tentative ('fairly confident') especially for accommodation businesses.

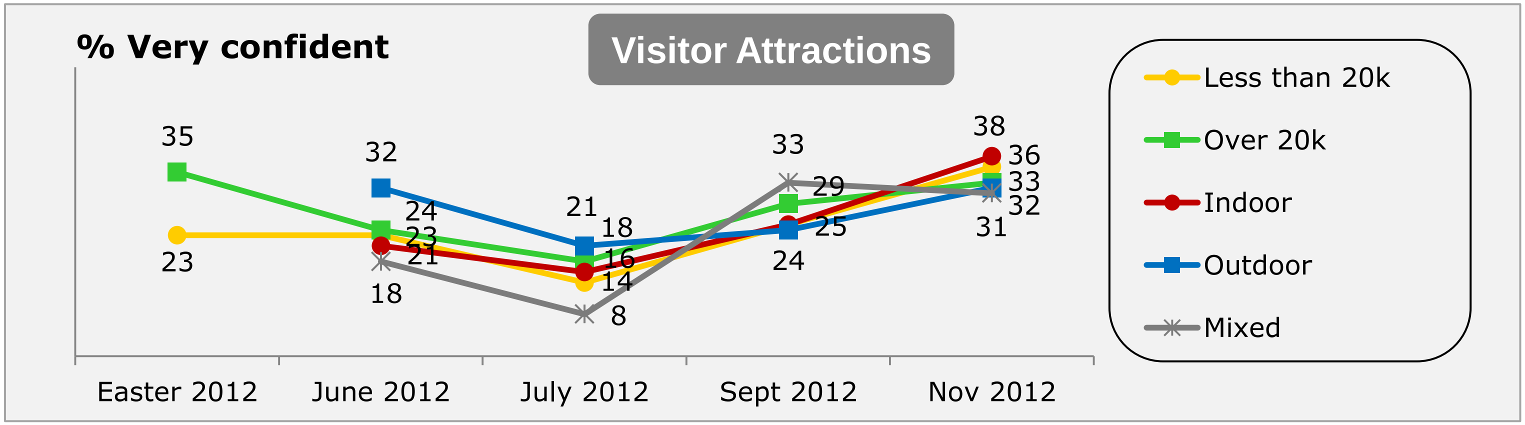


Confidence in performance for forthcoming period: By business type

Confidence amongst attractions continues to improve, but the accommodation market – in particular non-serviced accommodation - remains uncertain about its near future







Survey conducted:	Easter 2012	June 2012	July 2012	Sept 2012	Nov 2012
Period asked about:	Until after Jubilee	Until start of summer hols	Until end of summer hols	Until end of Oct	Until the end of the year

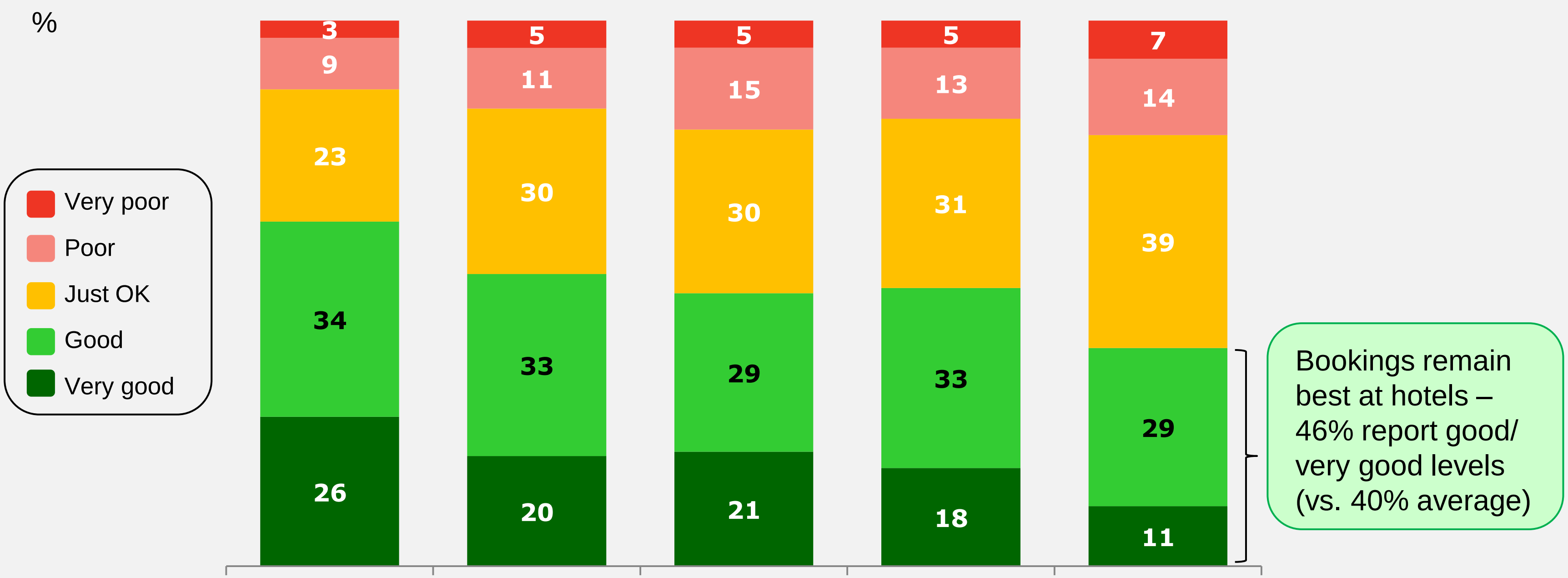
Q13

VisitEngland

bdrc continental

Advance booking levels: Accommodation

Advance booking levels have dipped, reflecting the season and no doubt contributing to the lower confidence levels of accommodation businesses.

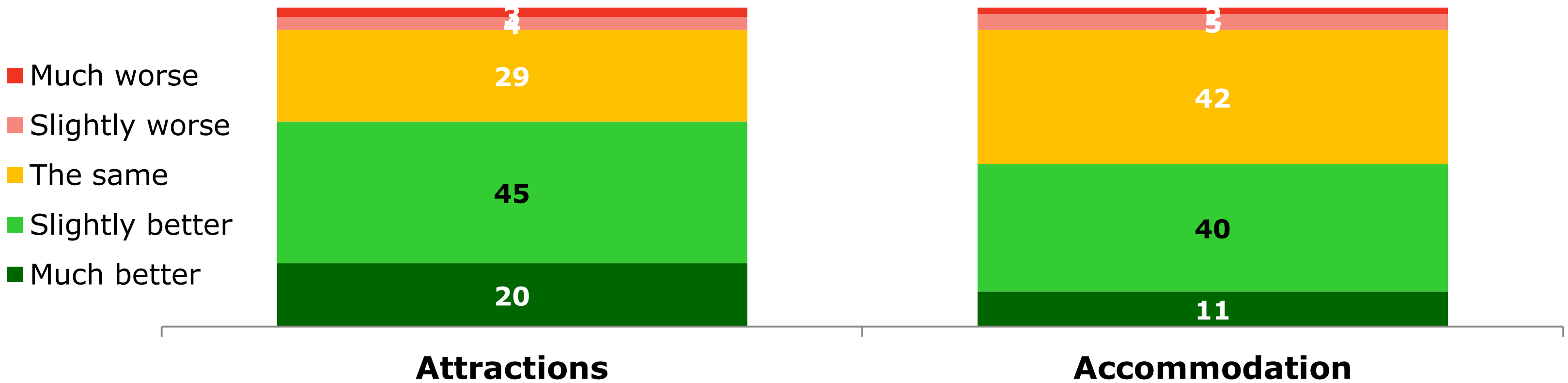


Survey conducted:	Easter 2012	June 2012	July 2012	Sept 2012	Nov 2012
Period asked about:	Until after Jubilee bank hol	Until start of summer hols	Until end of summer hols	Until end of October	Until the end of the year

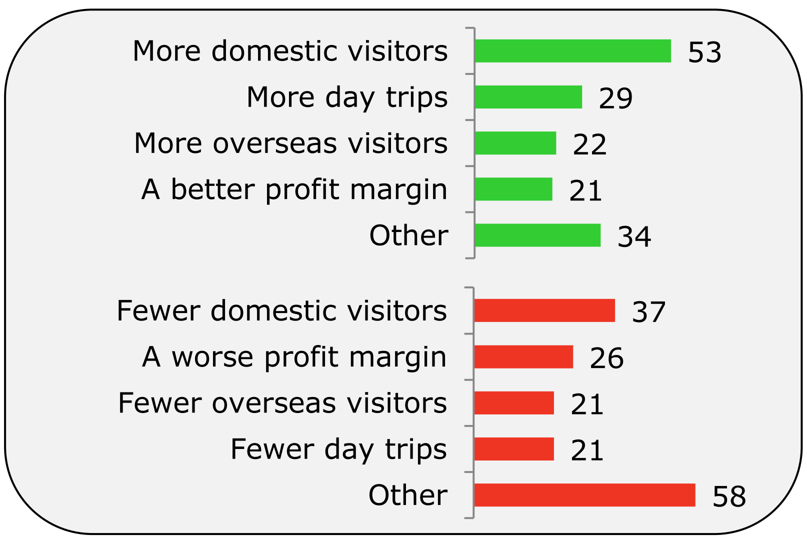
Q14

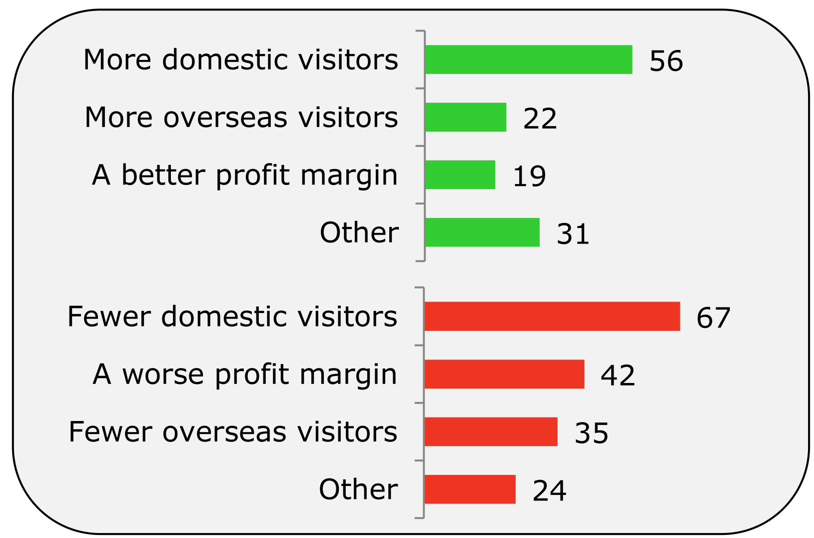
Business optimism for 2013

There appears to be a lot of uncertainty about what 2013 will bring. Overall it seems the expectation is for more of the same, but with a slight improvement driven by the domestic market.



Is that because you are expecting…?

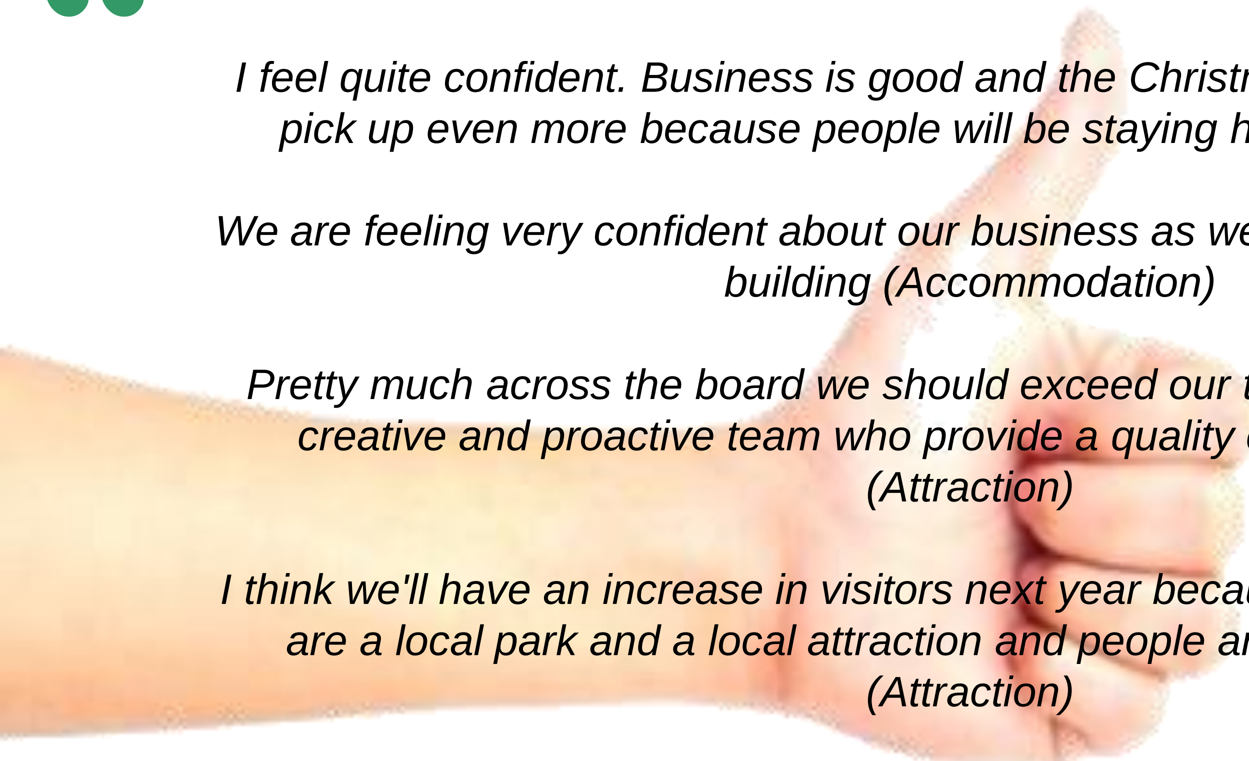




VisitEngland

Q15, Q16a, Q16b

Positive verbatim comments on business confidence



I feel quite confident. Business is good and the Christmas markets will make it pick up even more because people will be staying here (Accommodation)

We are feeling very confident about our business as we have just opened a new building (Accommodation)

Pretty much across the board we should exceed our targets. We have a very creative and proactive team who provide a quality customer experience (Attraction)

I think we'll have an increase in visitors next year because of the recession - we are a local park and a local attraction and people are staying home more (Attraction)

Well we've just had a big ceremony for veterans day which has put us in the public eye and raised our profile so I think we will get visitors coming to visit (Attraction)

Negative verbatim comments on business confidence

“

We have got a lot of competition now. The weather is a huge factor and people are going abroad more often because it is cheaper abroad (Accommodation)

I used to have regular guests coming 3 times a year and now this year it is only once because of the money (Accommodation)

The Premier Inns/Travel Inns are taking over the trade (Accommodation)

I think the general outlook is bleak - because we're in recession disposable income is limited
(Attraction)

It's not looking good because bookings are down and there are fewer tourists in the area and locals are reluctant to spend any money
(Attraction)

”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