VisitEngland

Tourism Business Monitor 2014

Wave 2 – Post-Easter holidays

Contents

- Background
- Key findings
- Business dashboards
- Visitor profile
- Business performance
- Business confidence

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:

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

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

Key Findings

A later, milder Easter period this year appears to have had a positive effect on visitor figures amongst both accommodation and visitor attraction businesses, and this is reflected in their satisfaction with business performance for this latest period.

The actual number of visitors has risen both over the most recent Easter period, and for the year to date for both business types, with accommodation businesses reporting a 4% increase in visitors compared with last Easter, and attractions reporting a 6% increase. This has helped buoy both year-to-date visitor figures to a 1% increase for accommodation businesses and 3% for visitor attractions, despite the floods at the start of the year.

Hotels continue to be particularly resilient, but self-catering businesses have seen a slight decrease in visitor numbers compared with the same period last year. Larger, and outdoor attractions have also fared well, the latter possibly benefitting from the milder weather recently.

Although self-catering accommodation businesses have reported a slight drop in visitors compared with last year, their satisfaction has increased, and is significantly higher than last April. All attraction types reported more visitors for this period than last year, resulting in increased satisfaction levels also.

A similar proportion of accommodation and attraction businesses were affected by the floods at the start of this year. The most prevalent effect was having fewer visitors that normal for the time of year. Although the floods had a significant impact on both business types, slightly more attractions claimed the floods had little to no impact on their visitor numbers so far. Directly correlating with the impact the floods had on visitor figures so far in 2014, more visitor attractions feel that the impact on their business performance for 2014 as a whole will be little to none.

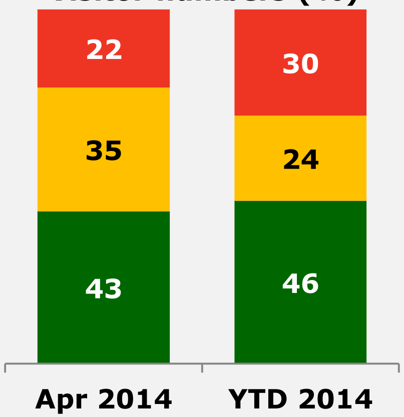
Businesses are optimistic for 2014, a more successful year than last and at a similarly high level consistent with Jan ‘14. Business confidence is higher at this point in the year than it was at the same point last year amongst accommodation businesses, whilst among attraction’s confidence is about the same as it was last Easter. Caravan/camping businesses and mixed indoor/outdoor attractions are feeling particularly confident for the forthcoming period, likely due to the approach into Spring/Summer and anticipated warmer, drier weather and buoyed by an encouraging previous year.

Business Dashboards

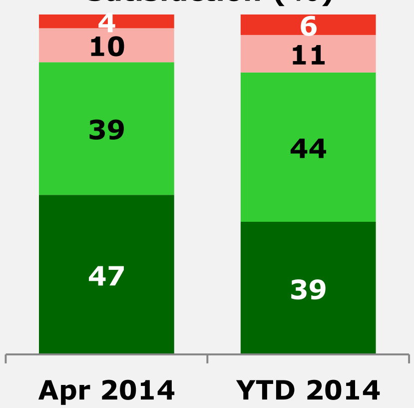
Business Performance Dashboard

Accommodation

Visitor numbers (%)



Satisfaction (%)



Versus same period previous year…

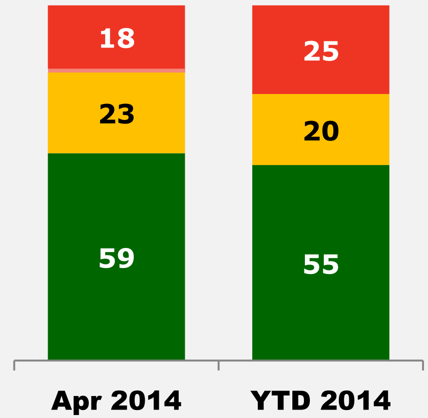
- Down
- Same
- Up

Satisfied with business performance…

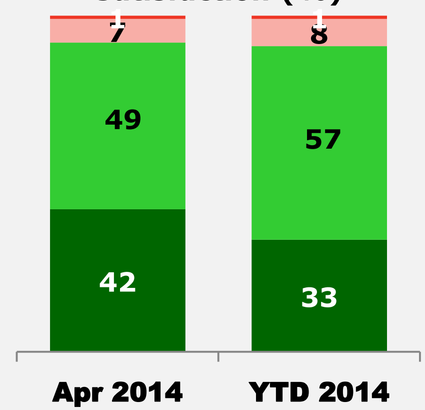
- Not at all
- Not very
- Quite
- Very

Visitor Attractions

Visitor numbers (%)



Satisfaction (%)



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Apr 2014: Easter period 2014

Q3/4. Q7/8,

Business Confidence Dashboard: confidence for next 1.5-2 months

Period asked about:

Survey conducted:	Period asked about
Sept 2012	Until end of October
Nov 2012	Until the end of the year
Jan 2013	Until the end of Easter
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

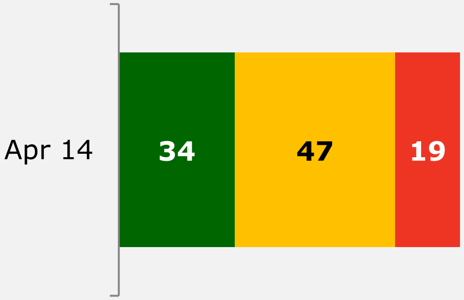
Visitor Profile

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

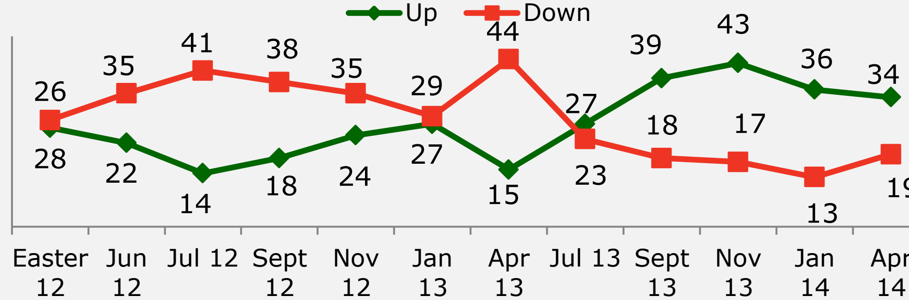
Up | Same | Down

NET: Up - Down

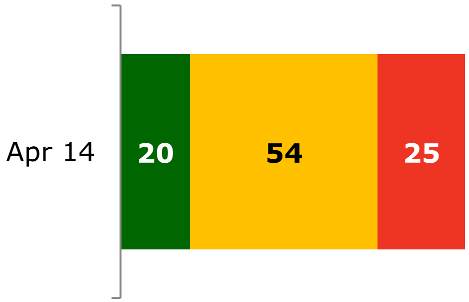
Domestic visitors



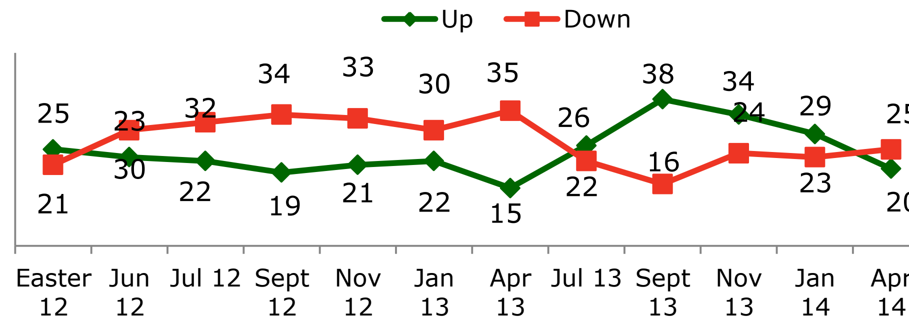
+15

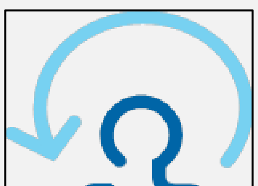


Overseas visitors

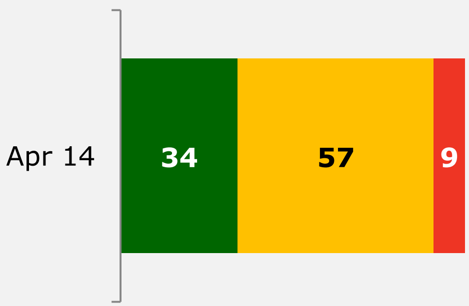


-5

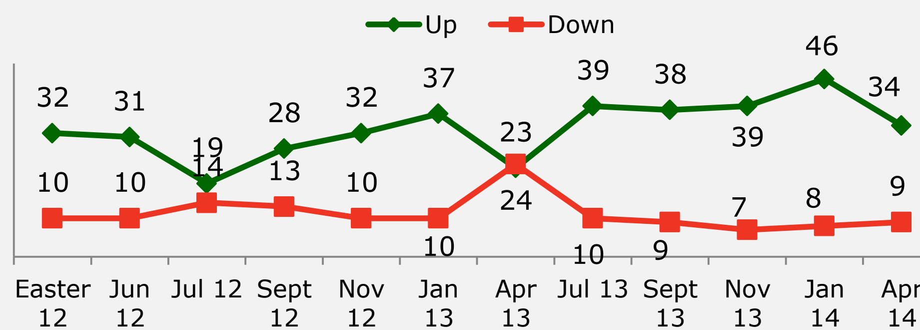




Repeat visitors



+25

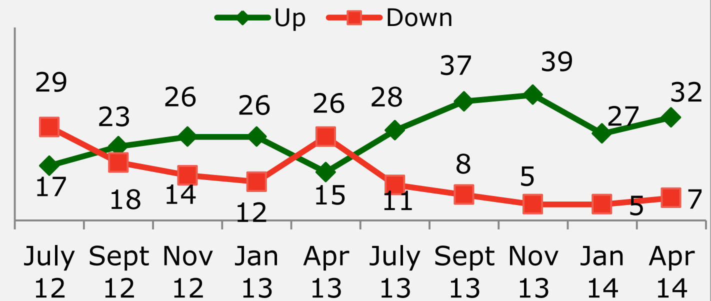


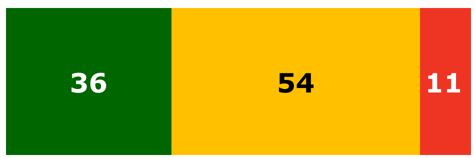
Changing Visitor Profile (year-to-date vs. previous year): **Attractions**

Up | Same | Down

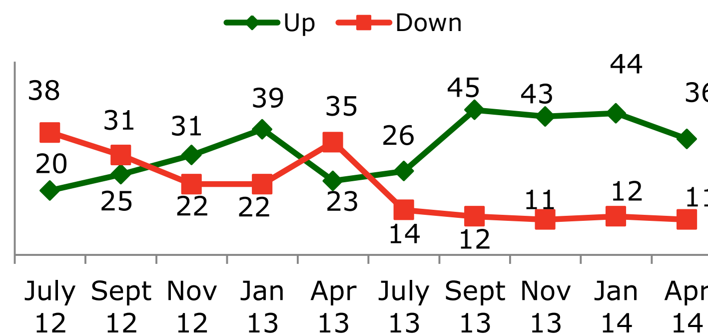
NET: Up - Down

+25

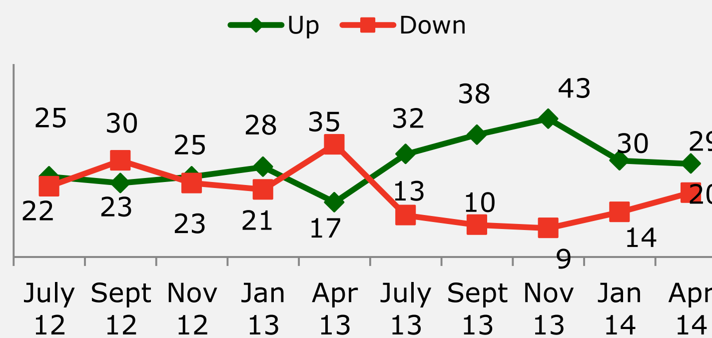




+25



+9



Q13

VisitEngland

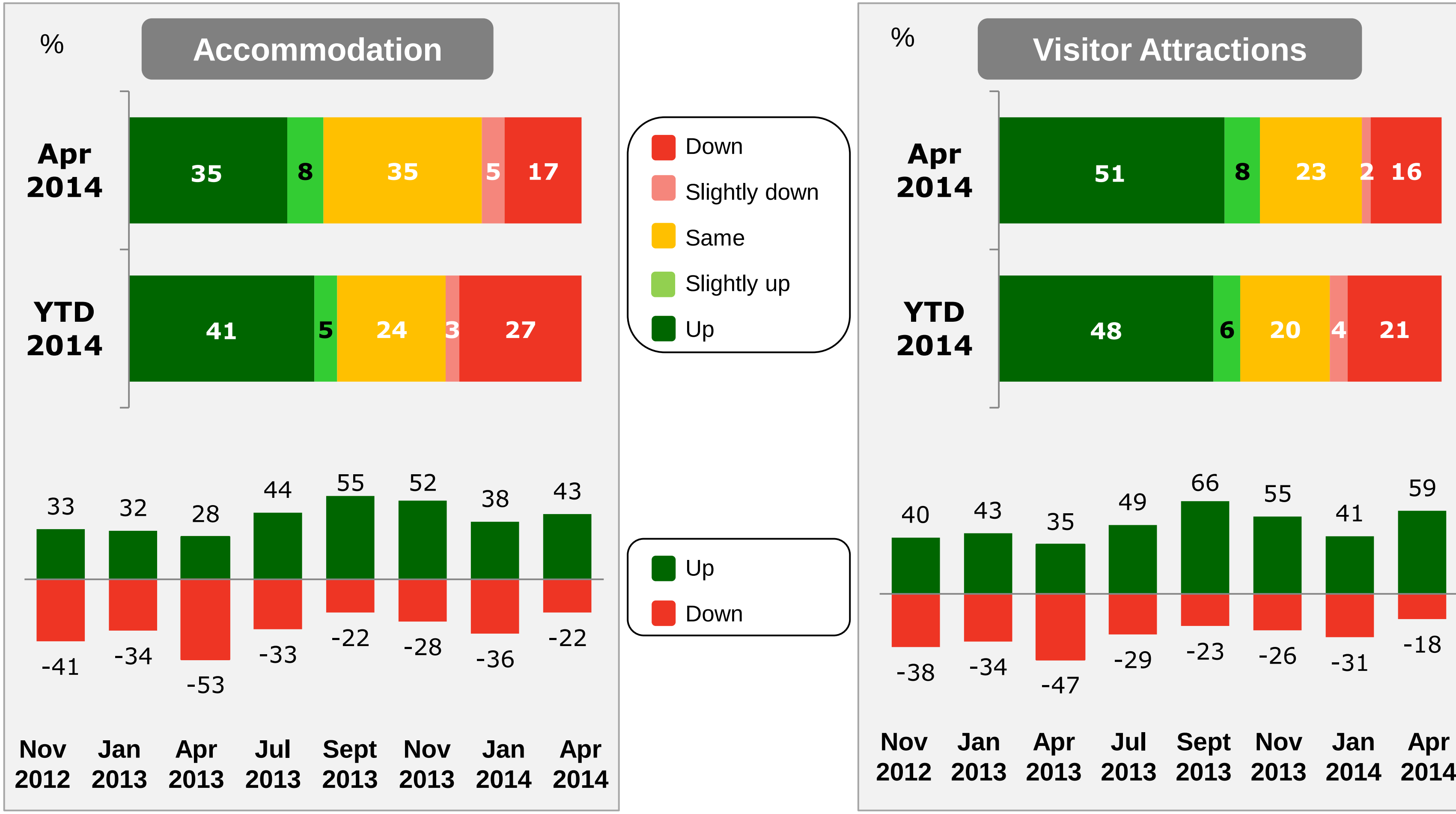
bdrc continental

VisitEngland

Business Performance

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

Visitor numbers have improved for the Easter period this year compared with last year for both accommodation businesses and visitor attractions, likely helped by the clement weather and later Easter.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Apr 2014: Easter period 2014 **/ Jan 2014:** Christmas and New Year period 2013/ **Nov 2013:** Mid-September until the end of October/ **Sept 2013:** Mid-July until end of the Summer holidays / **July 2013:** After Easter holidays until mid-July

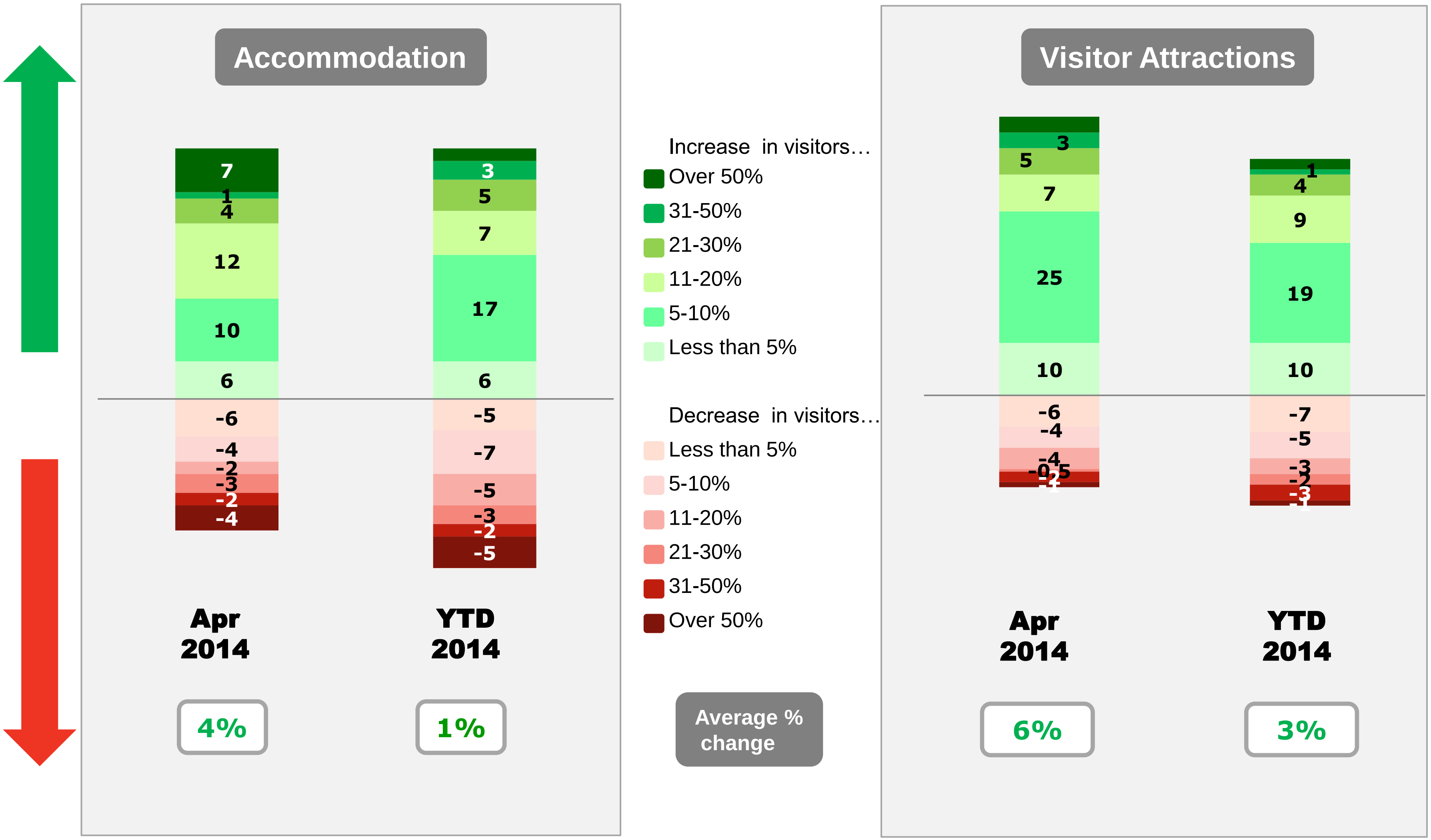
VisitEngland™

Q3/4 & Q7/8

bdrc continental

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

The actual number of visitors has risen both over the most recent Easter period and for the year to date for both business types.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Apr 2014: Easter period 2014

Q9, Q5

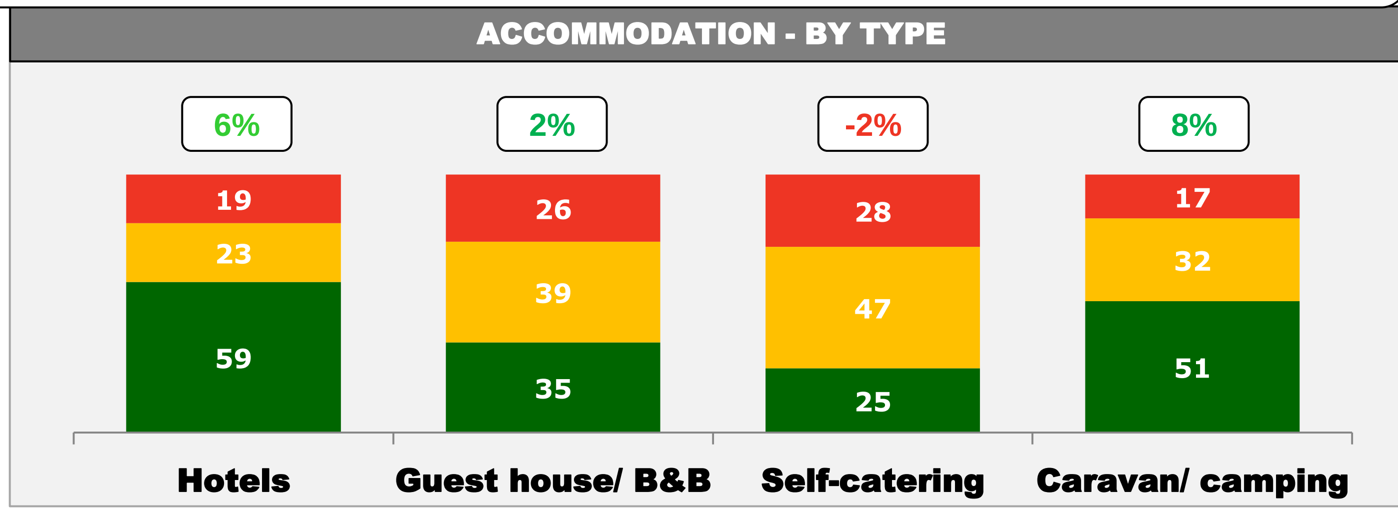
Changing business performance: By business type

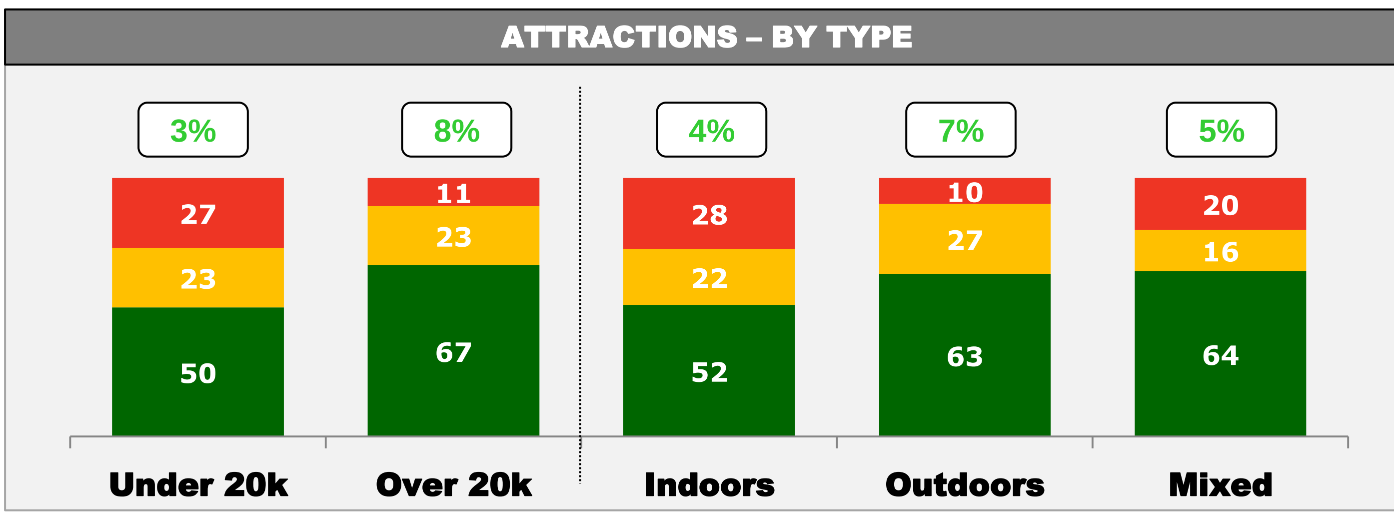
Hotels continue to be particularly resilient, but self-catering businesses have seen a slight decrease in visitor numbers compared with the same period last year. Larger, and outdoor attractions have also fared well, the latter possibly benefitting from the milder weather recently.

Versus same period previous year…

% of businesses:
- Down
- Same
- Up

% change in visitor numbers:

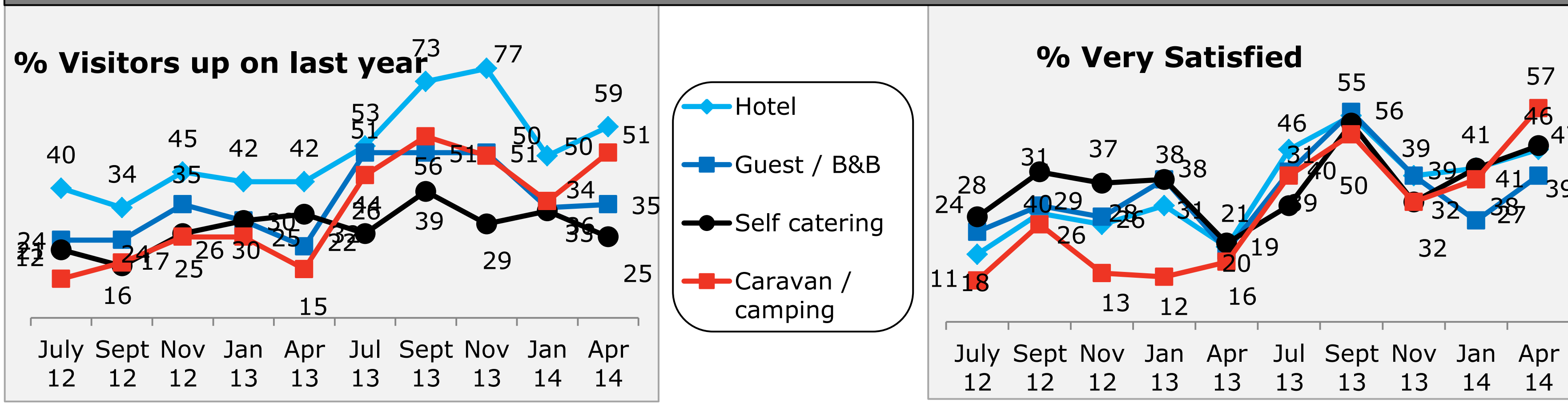




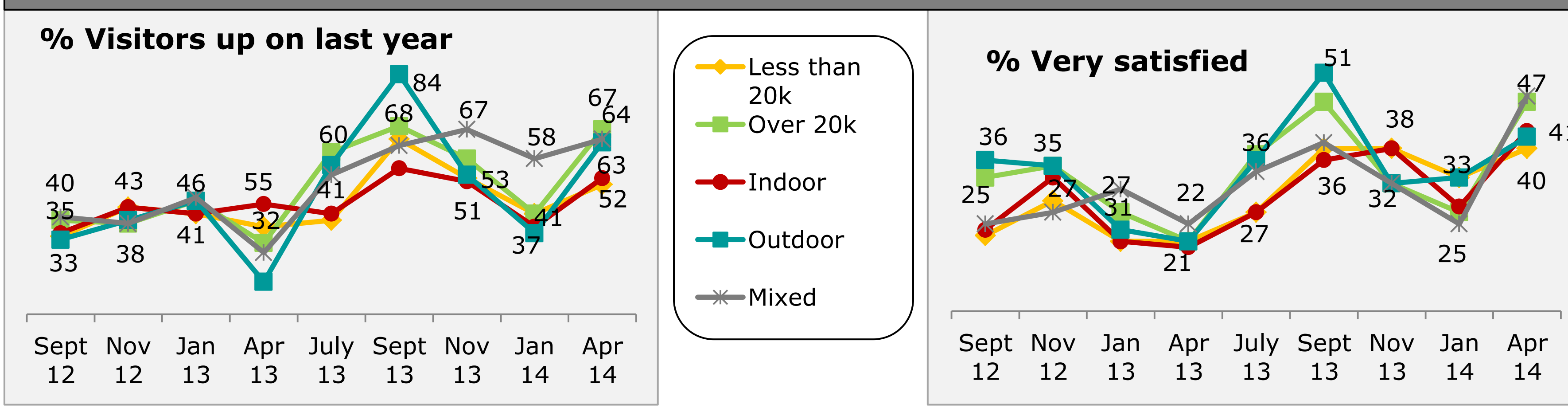
Changing business performance: By business type

Although self-catering accommodation businesses have reported a slight drop in visitors compared with last year, their satisfaction has increased, and is significantly higher than last April. All attraction types report more visitors for this period than last year, resulting in increased satisfaction levels also.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE



VisitEngland

bdrc continental

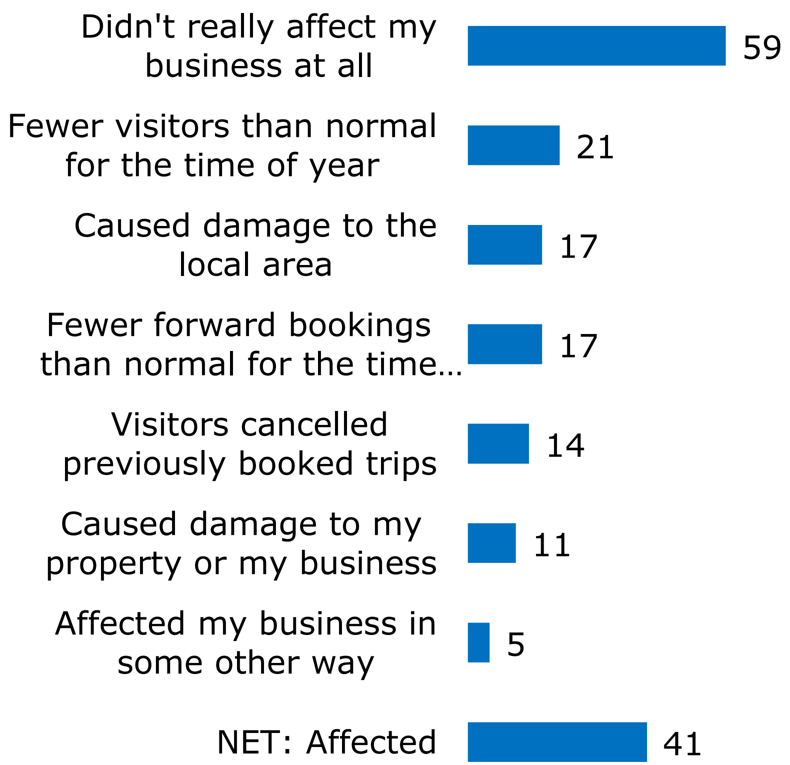
Q3/4, Q6

Impact of the floods

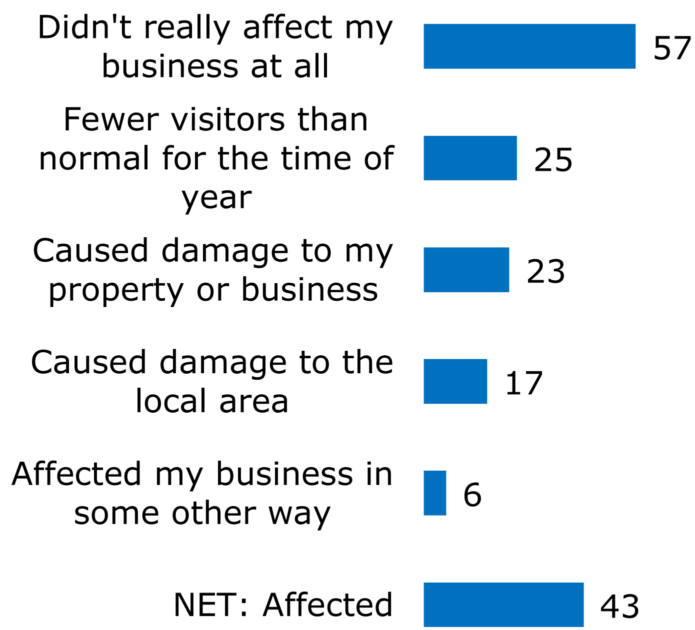
Effect of floods 2014

A similar proportion of accommodation and attraction businesses were affected by the floods at the start of this year, with the most prevalent effect being that there were fewer visitors/guests than normal for the time of year.

ACCOMMODATION



ATTRACTIONS



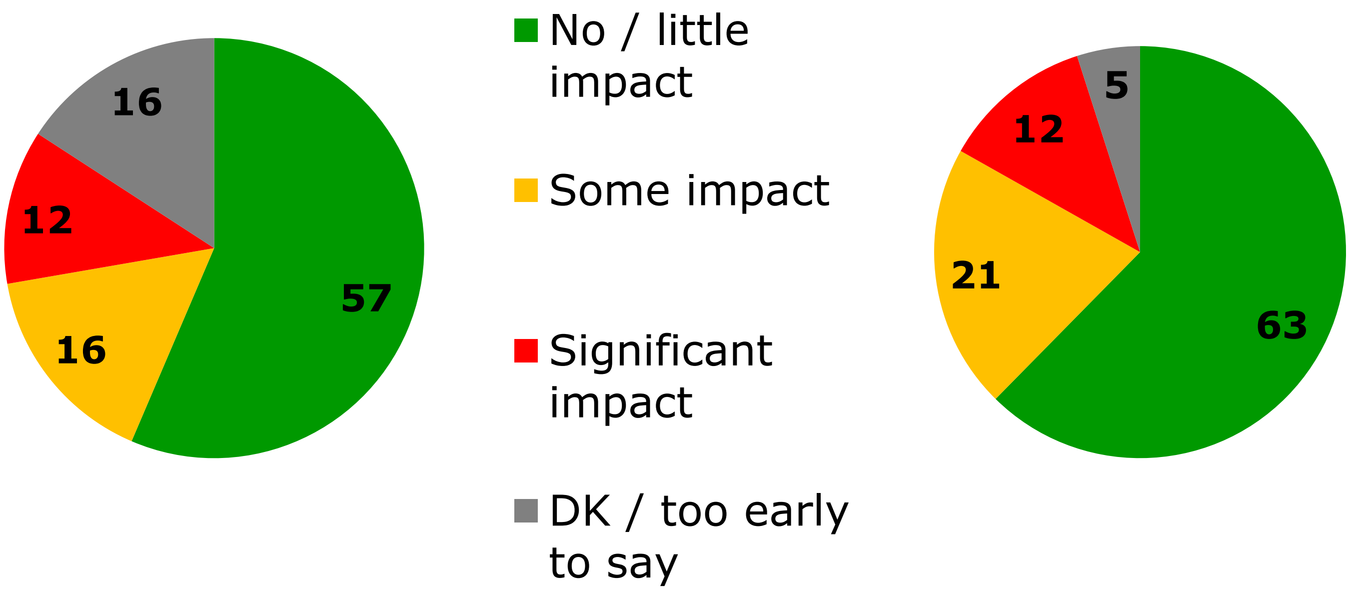
VisitEngland

Q16a

Floods – Impact on visitor numbers YTD 2014

Overall, the floods certainly had an impact on both accommodation and attraction businesses visitor figures for the year to date. However, slightly more attractions claimed the floods had little to no impact on their visitor numbers so far.

ACCOMMODATION | **ATTRACTIONS**

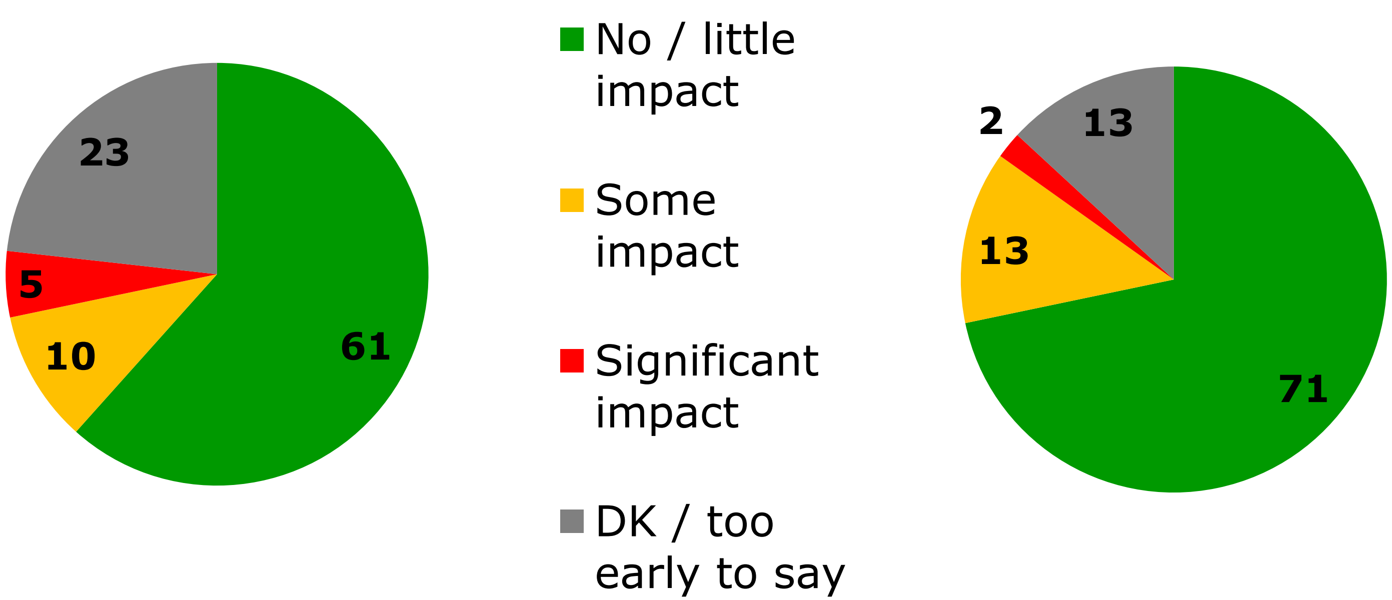


VisitEngland™

Floods – Impact on business performance for 2014 as a whole

Directly correlating with the impact the floods had on visitors figures so far in 2014, more visitor attractions feel that the impact of the floods on their business performance for 2014 as a whole will be little to none.

ACCOMMODATION | **ATTRACTIONS**

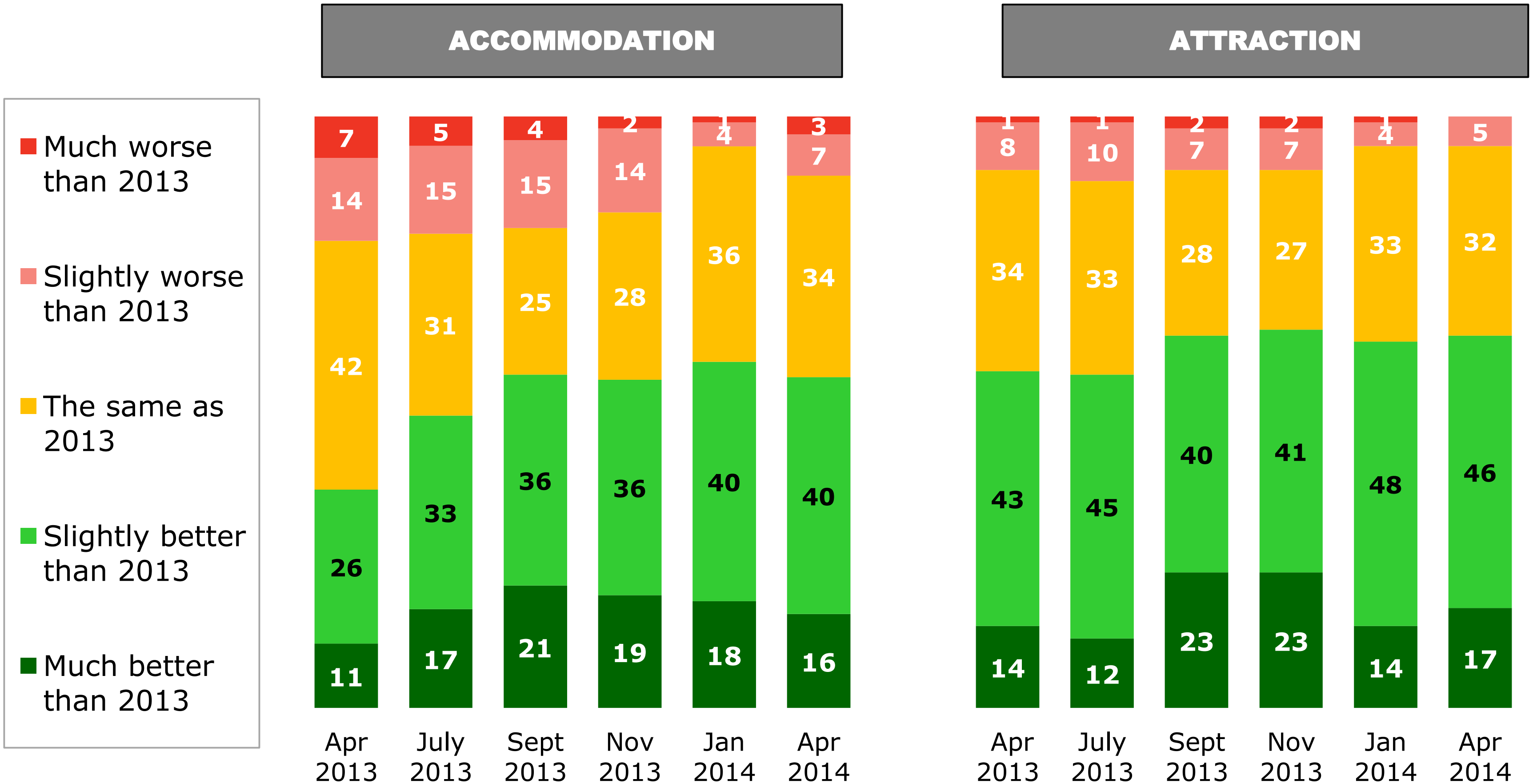


VisitEngland

Business Confidence

Business optimism for 2014

Optimism for 2014 to be more successful than 2013 remains on a similarly high level to Jan ‘14. Business confidence is higher at this point in the year than it was at the same point last year amongst accommodation businesses.

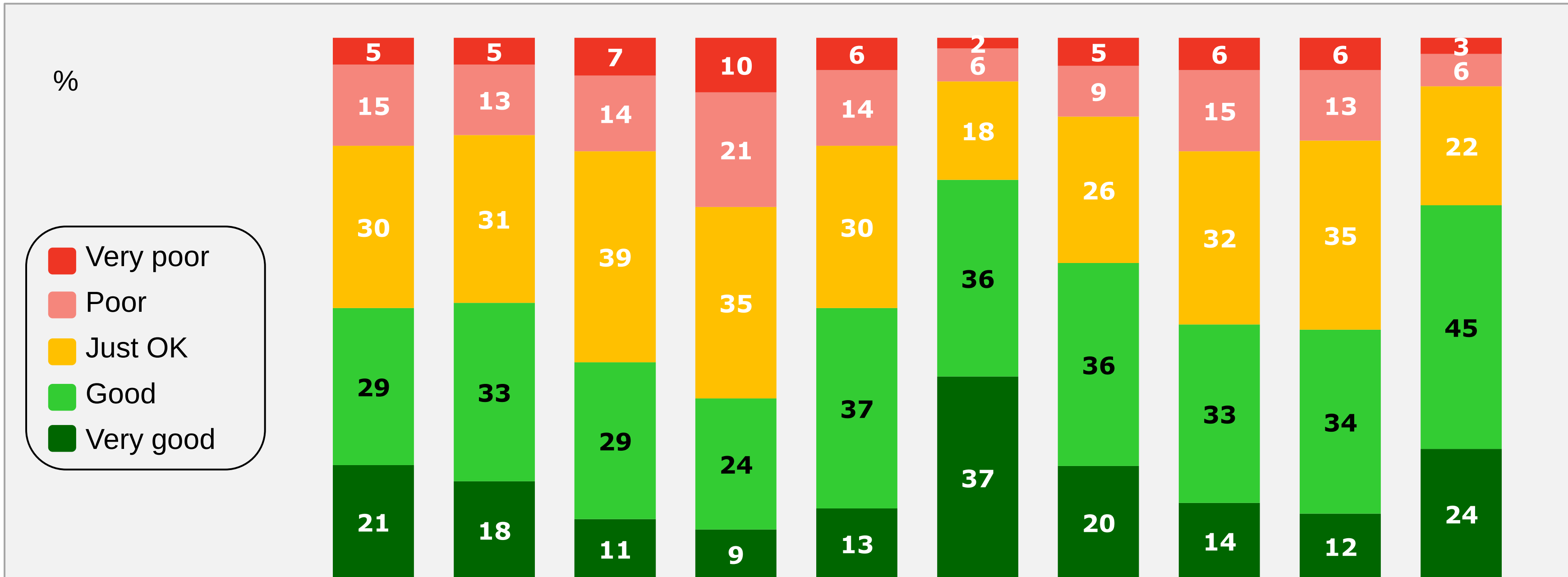


VisitEngland

Q15

Advance booking levels: Accommodation

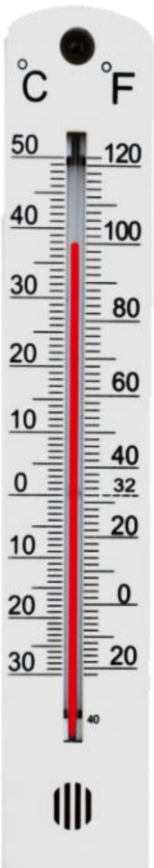
Advanced booking levels are back up to Summer '13 levels and well ahead of those seen in the corresponding period of April 2013. The more clement weather recently may well have played a part in this, particularly for weather-dependent accommodation such as caravan/campsites.

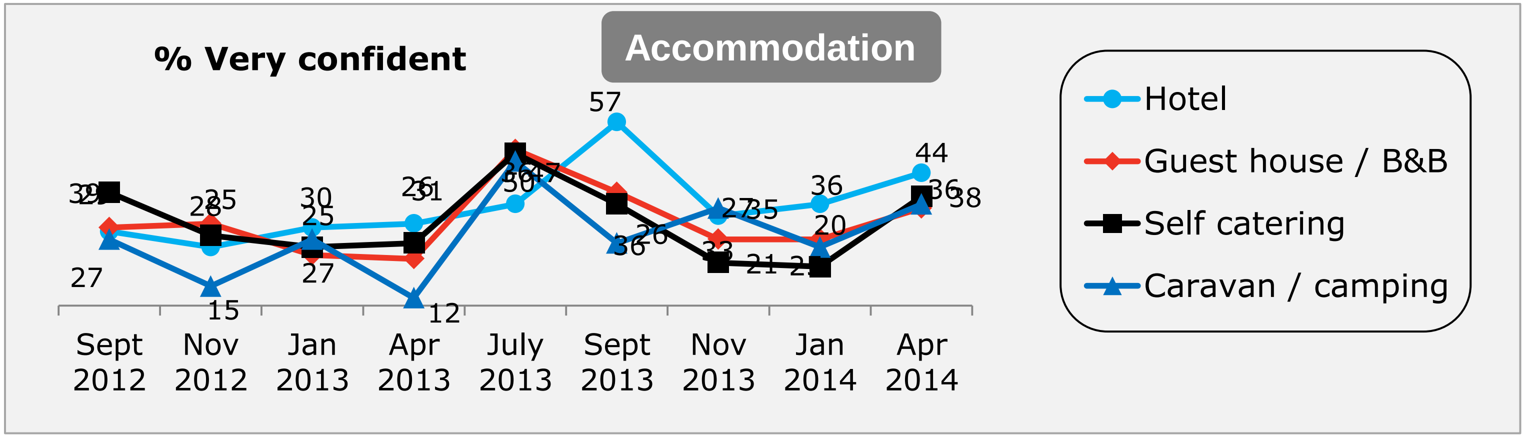


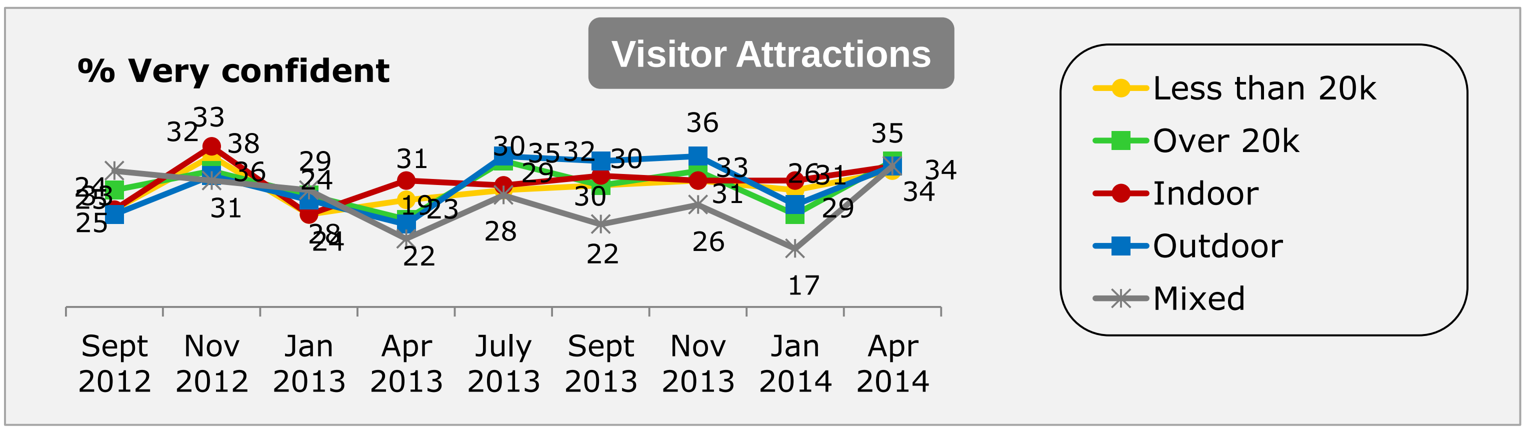
Survey conducted:	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014
Period asked about:	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer

Confidence in performance for forthcoming period: **By business type**

Confidence levels are greatly improved on this same period last year, particularly among caravan/camping businesses and mixed indoor/outdoor attractions. The better weather and later Easter this year has likely contributed to this.







Survey conducted:	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014	Apr 2014
Period asked about:	Until end of Oct	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of the Summer holidays	Until end of Oct	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer

Positive verbatim comments on business confidence

I think just because the economy is improving people have more money to spend - last year people were being careful with their pennies (Accommodation)

We've redone our website and marketing so bookings should be good (Accommodation)

Very confident as we have got more family events planned (Attraction)

Hopefully with the economy improving people will want to go out more and we have some good exhibitions coming up (Attraction)

Very confident as the weather has been good and we have new events coming up. Also ongoing events are increasing in popularity. (Attraction)

Q19

Negative verbatim comments on business confidence

I think the market is predominantly these day last minute bookings - people want reductions - and I still think we are being affected by the unbalanced reportage of the floods. (Accommodation)

More competition these days. There's a lot more accommodation in the market place than 15 years ago when I started (Accommodation)

Lots of people leaving booking until the last minute - A few years ago, people would be ringing by now for the summertime. Families are looking after their money more, and are staying for less time. (Accommodation)

Not totally confident because there has been a slow down since Christmas - I think a lot has been to do with the weather (Attraction)

There have been issues with the funding from the local council - we have had to change our opening hours to just a few days a week and we also lost a lot of members of staff as well (Attraction)


VisitEngland