VisitEngland

Tourism Business Monitor 2014

Wave 1 – Post-Christmas and New Year period

Contents

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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:

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

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

Key Findings

After a particularly successful latter half of 2013, confidence amongst both accommodation and attraction businesses for the upcoming period is buoyed. Although fewer businesses are reporting increases in visitor/guest numbers for the festive period compared with 2013, satisfaction levels remain relatively good.

The actual number of guests/visitors during 2013 as a whole rose by 3% for both accommodation businesses and visitor attractions, but during the latest period neither have seen a change in visitor/guest figures compared with the same period last year.

Growth for visitor attractions has again come from all visitor types. The festive period has brought a lot of repeat and domestic visitors to accommodation businesses, with many anecdotally utilising on-site facilities for Christmas and New Year parties also.

Although the % of businesses reporting increases in visitors for Jan 2014 is down following the particularly successful Summer & Autumn, figures are still comparatively good compared with Jan 2013. Perhaps as a result of this, satisfaction levels remain relatively solid, although indoor and mixed attractions and guesthouse/B&Bs were perhaps expecting to do better.

Looking to the year ahead, optimism for 2014 to be more successful than 2013 remains on a high level with well over half of both accommodation and attraction businesses saying that it will be better than 2013.

Satisfaction with advanced bookings amongst accommodation businesses has remained almost identical to the Autumn period, but is a very good improvement on January 2013 when 33% reported good/very good advanced booking levels, compared with 46% in January 2014.

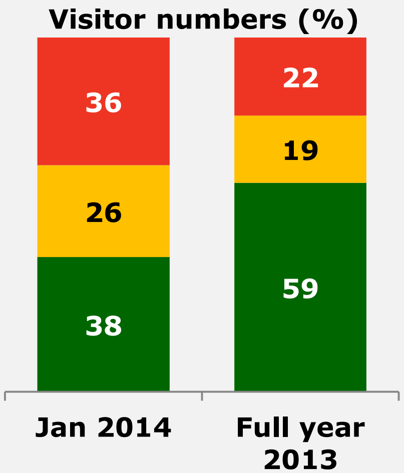
Accommodation businesses were more likely to offer deals / discounts during 2013 than visitor attractions. Almost half of accommodation businesses offered a reduced price discount during 2013, which was also the second most offered type of deal/discount amongst attractions, after extra person discounts.

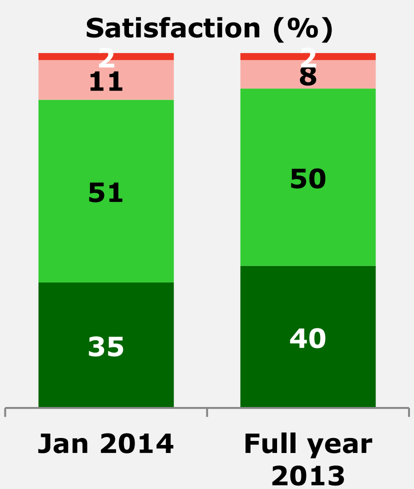
Investment in infrastructure looks to be the most likely for all, but many will also be looking to invest in marketing. All business types are well digitally equipped, with almost all having their own website, and the majority active on social media sites such as Facebook / Twitter. Mobile optimised sites / apps are also more prevalent this year.

Business Dashboards

Business Performance Dashboard

Accommodation





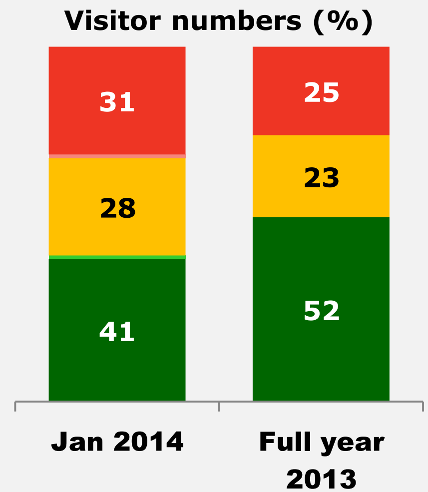
Versus same period previous year…

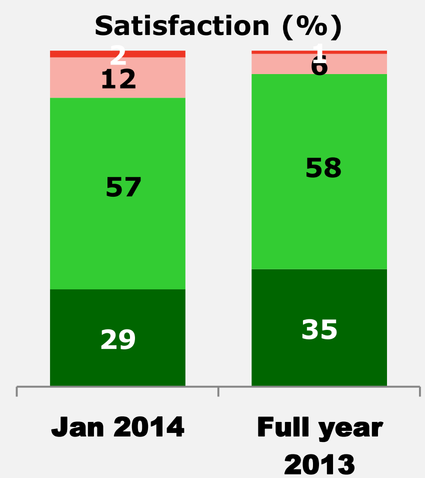
- Down
- Same
- Up

Satisfied with business performance…

- Not at all
- Not very
- Quite
- Very

Visitor Attractions





PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2014: Christmas and New Year period 2013

VisitEngland

bdrc continental

Q3/4. Q7/8,

Business Confidence Dashboard: confidence for next 1.5-2 months

Period asked about:

Survey conducted:	Period asked about
July 2012	Until end of summer hols
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

Q13

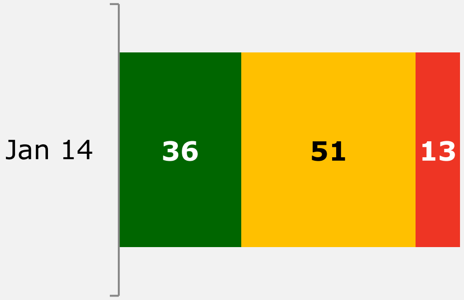
Visitor Profile

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

Up | Same | Down

NET: Up - Down

Domestic visitors



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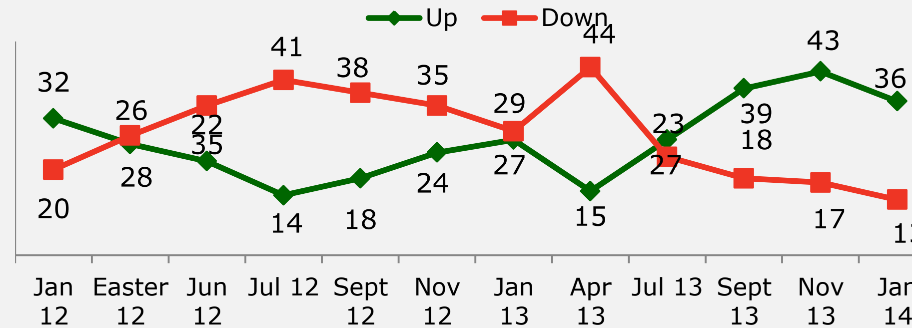
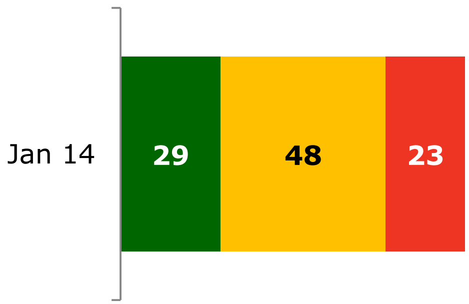


Overseas visitors



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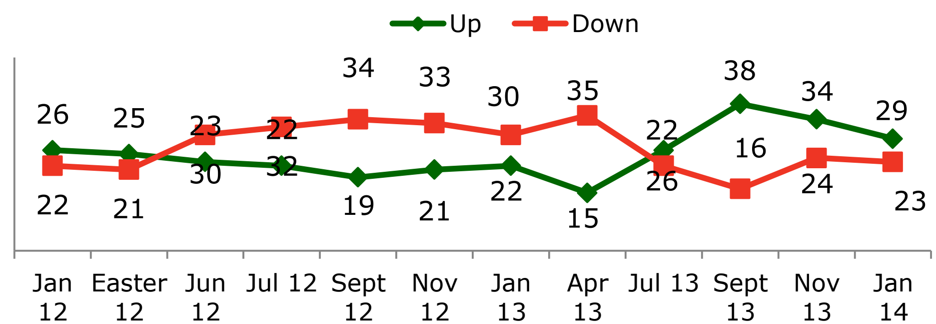
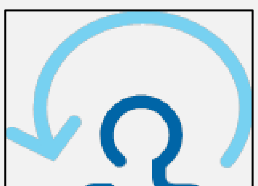
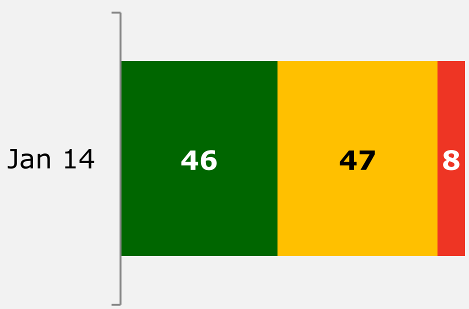




Repeat visitors



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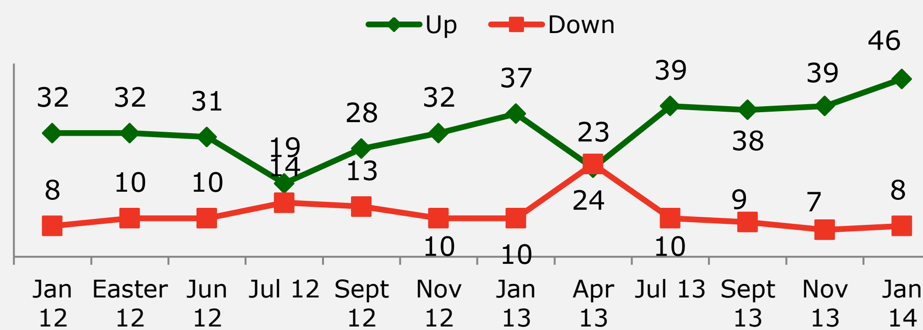


Q12

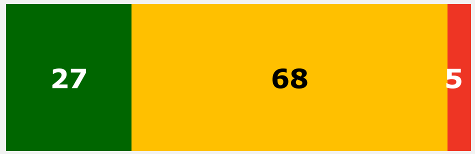
Changing Visitor Profile (year-to-date vs. previous year): **Attractions**

Up | Same | Down

NET: Up - Down

Visitors from immediate locality

Jan 14



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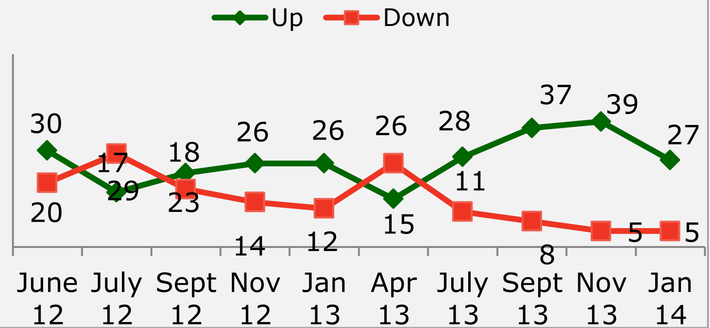
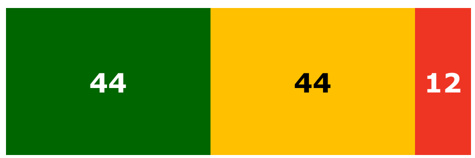


Other domestic visitors

Jan 14



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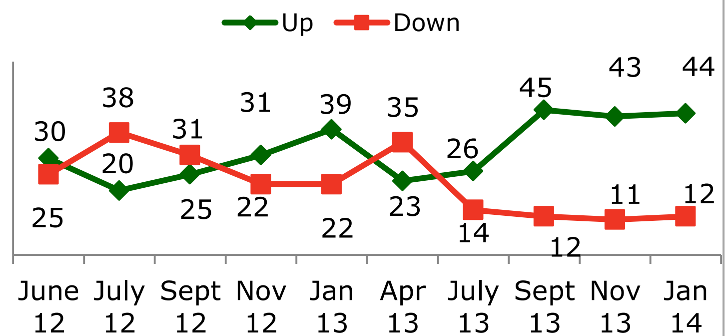
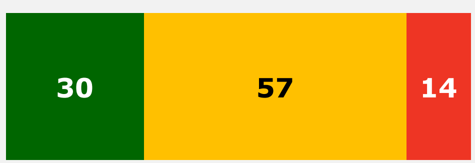


Overseas visitors

Jan 14



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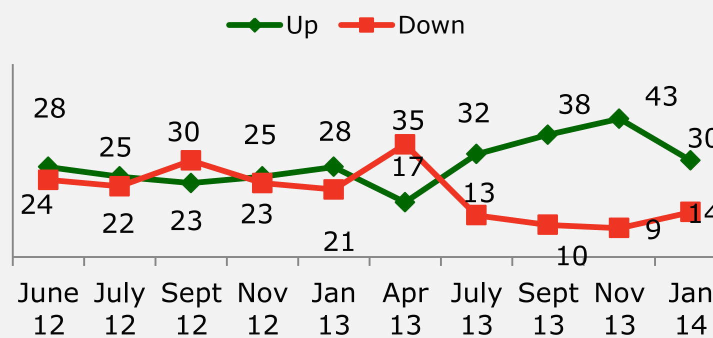


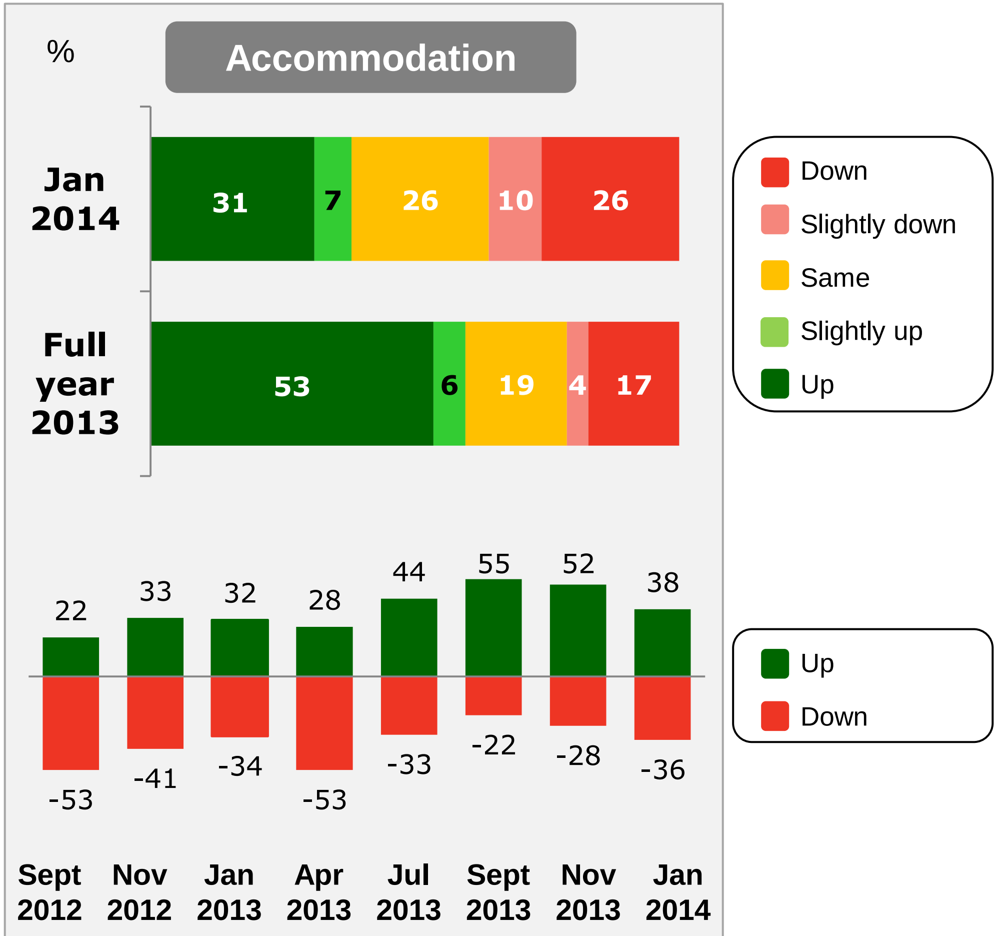
PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2014: Christmas and New Year period 2013

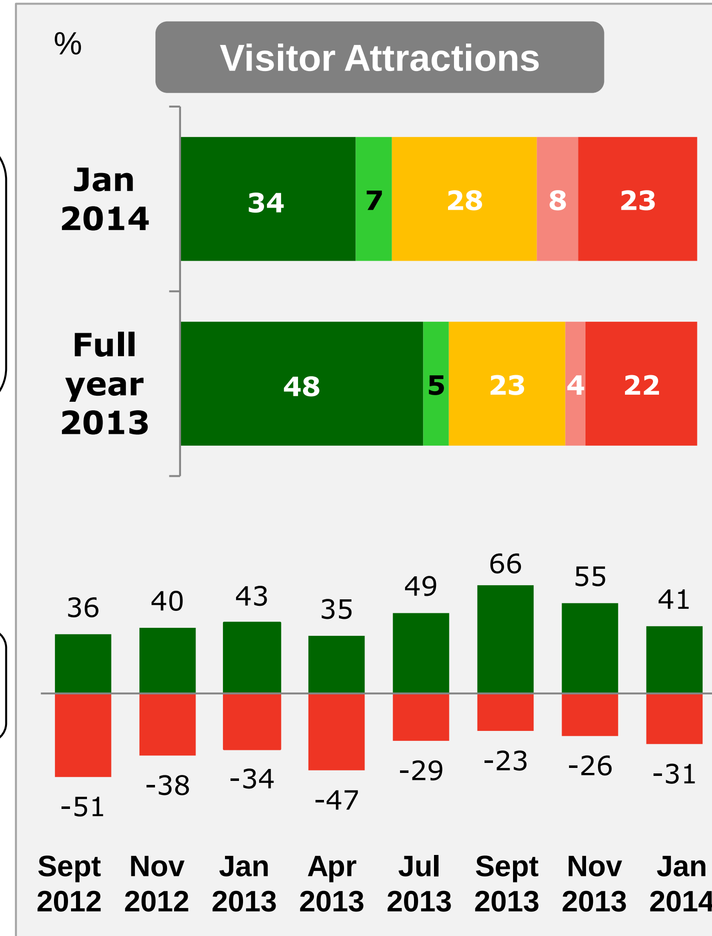
Q13

Business Performance

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

Business has dropped a little over this latest festive period after a strong Summer and Autumn period, but the figures are still on a similar level to the same period last year.



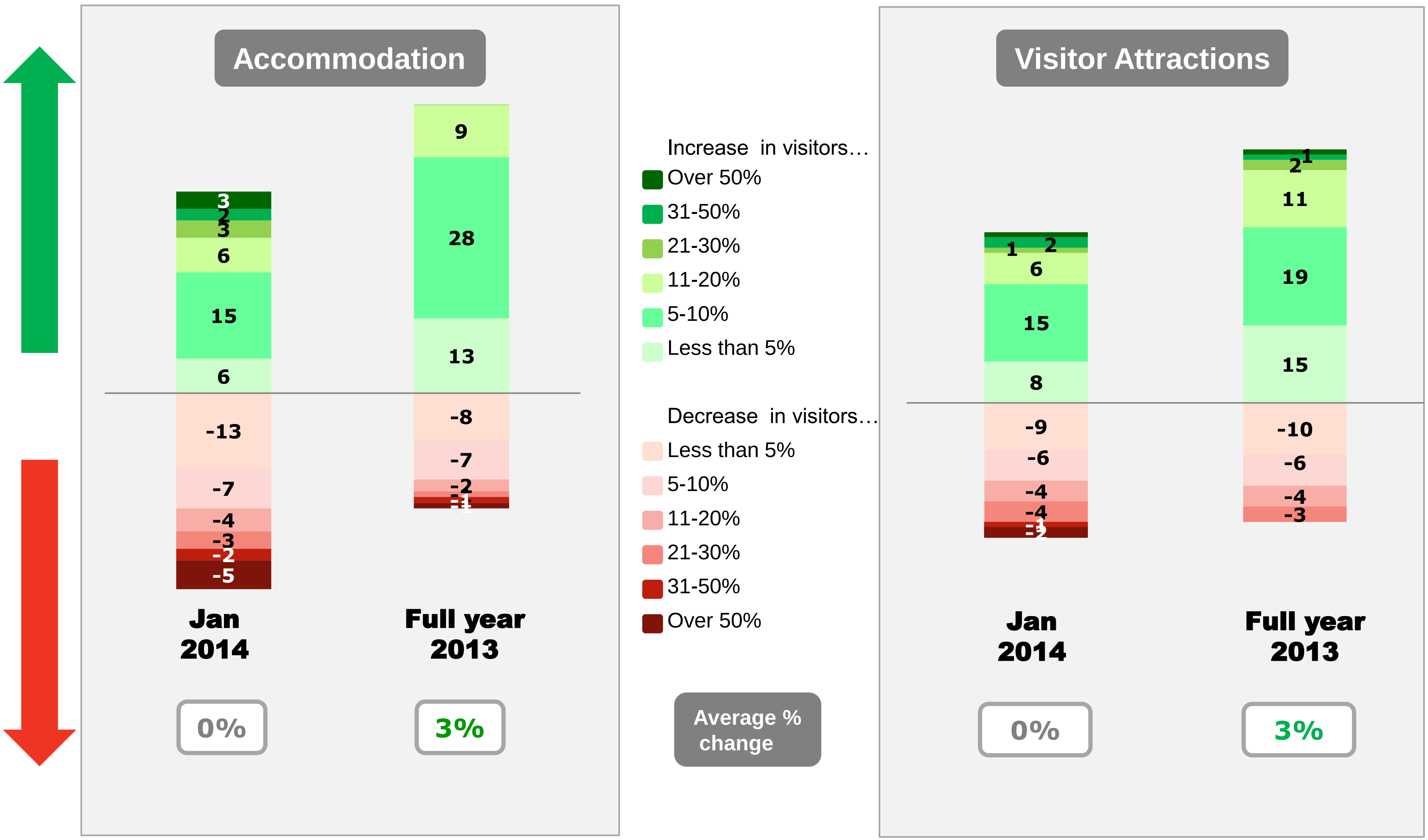


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2014: Christmas and New Year period 2013/ **Nov 2013:** Mid-September until the end of October/ **Sept 2013:** Mid-July until end of the Summer holidays / **July 2013:** After Easter holidays until mid-July/ **Apr 13** January until the end of the Easter holidays.

Q3/4 & Q7/8

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

The actual number of guests has risen by 3% for both accommodation businesses and visitor attractions during 2013 as a whole. Visitor figures for the festive period however remain unchanged compared with Jan ‘13.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2014: Christmas and New Year period 2013

VisitEngland

bdrc continental

Q9, Q5

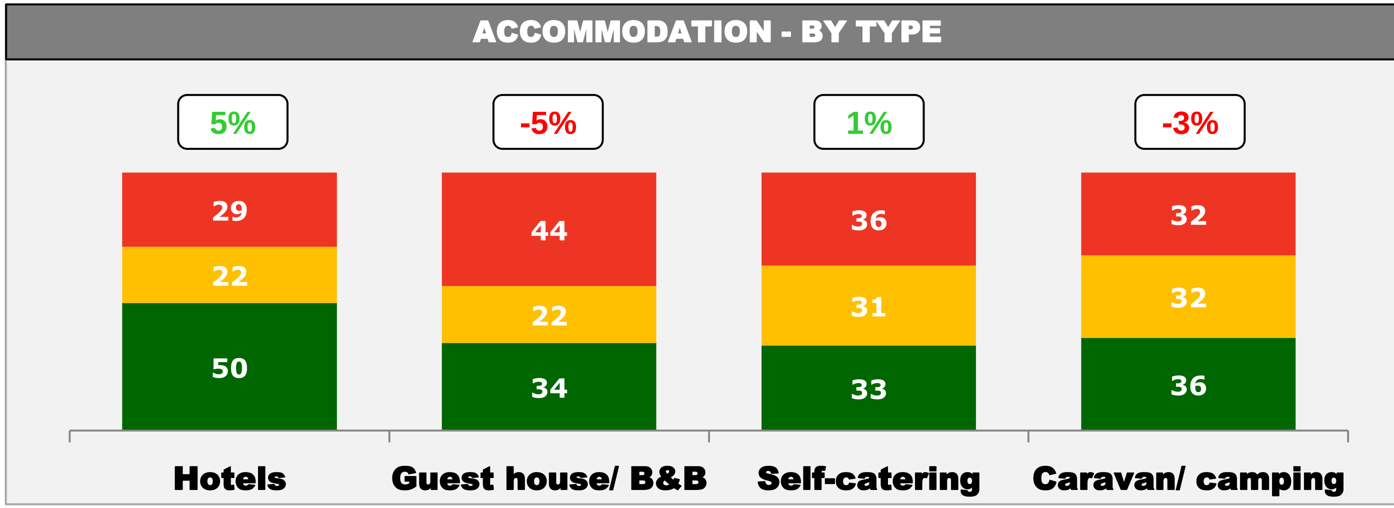
Changing business performance: By business type

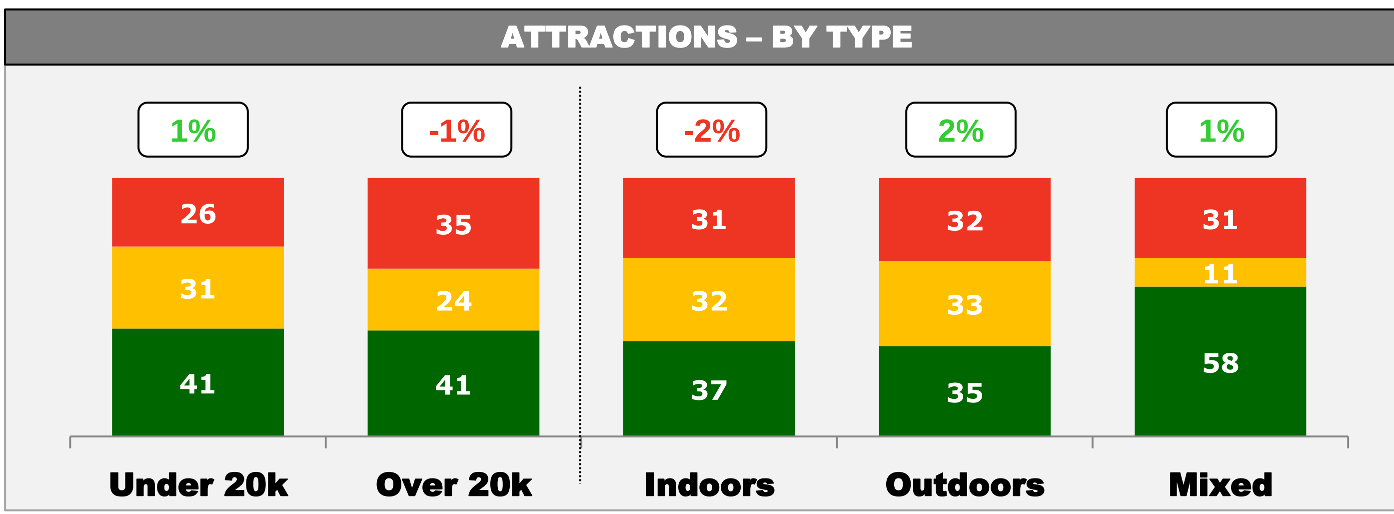
Hotels continue to be particularly resilient, whilst outdoor visitor attractions also fared well this period. Guest house/B&Bs, caravan/camping businesses and indoor attractions are down on visitor numbers compared with the festive period 2013.

Versus same period previous year…

% of businesses:
- Down
- Same
- Up

% change in visitor numbers:

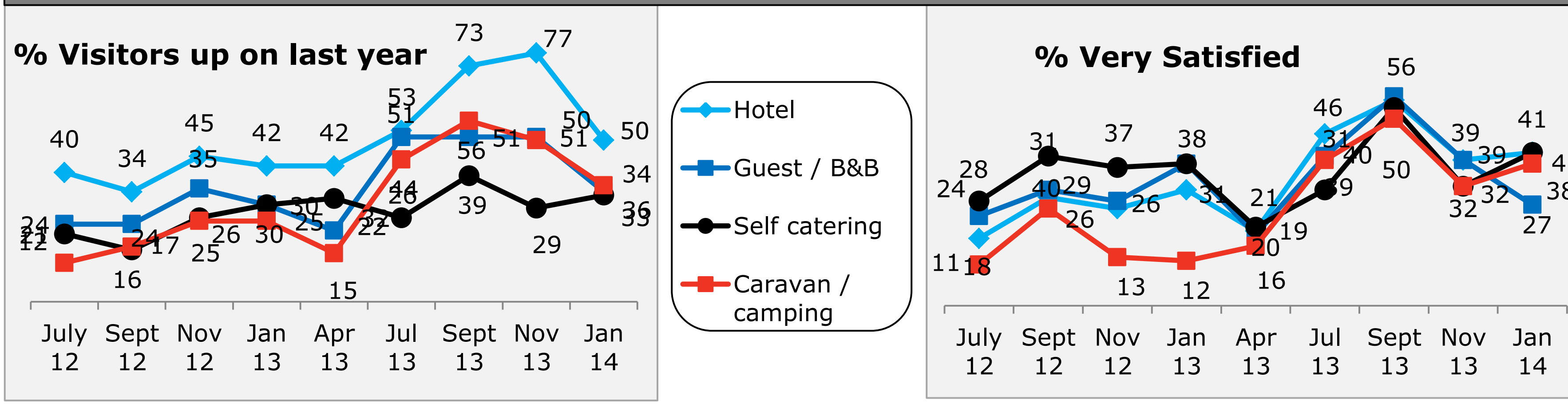




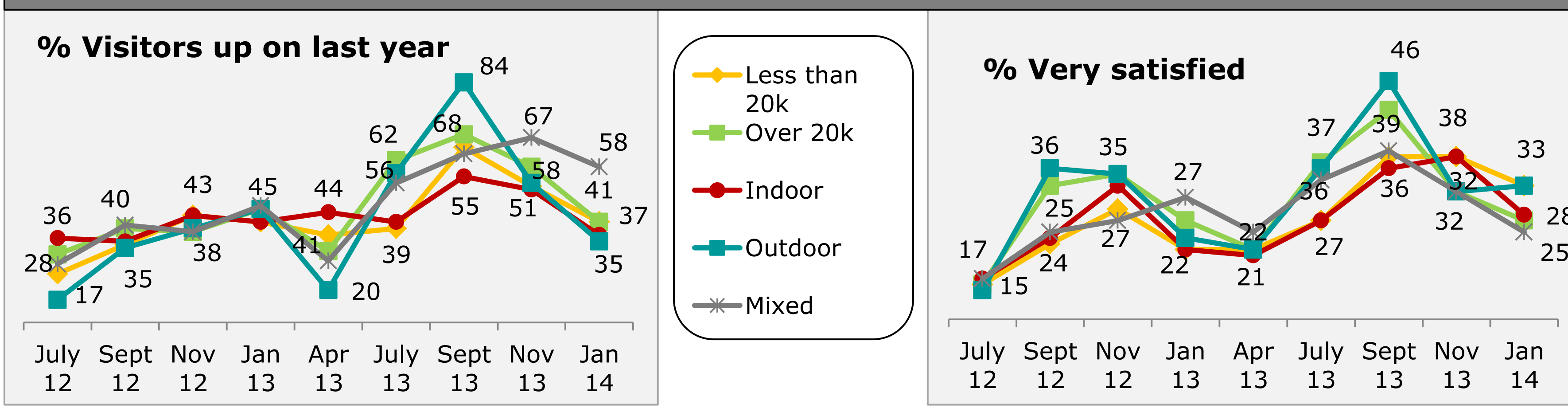
Changing business performance: By business type

Although the % of businesses reporting increases in visitors on last year is down following a successful Summer & Autumn, figures are still comparatively good compared with Jan 2013. Perhaps as a result of this, satisfaction levels remain relatively solid, although indoor and mixed attractions and guesthouse/B&Bs were perhaps expecting to do better.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE

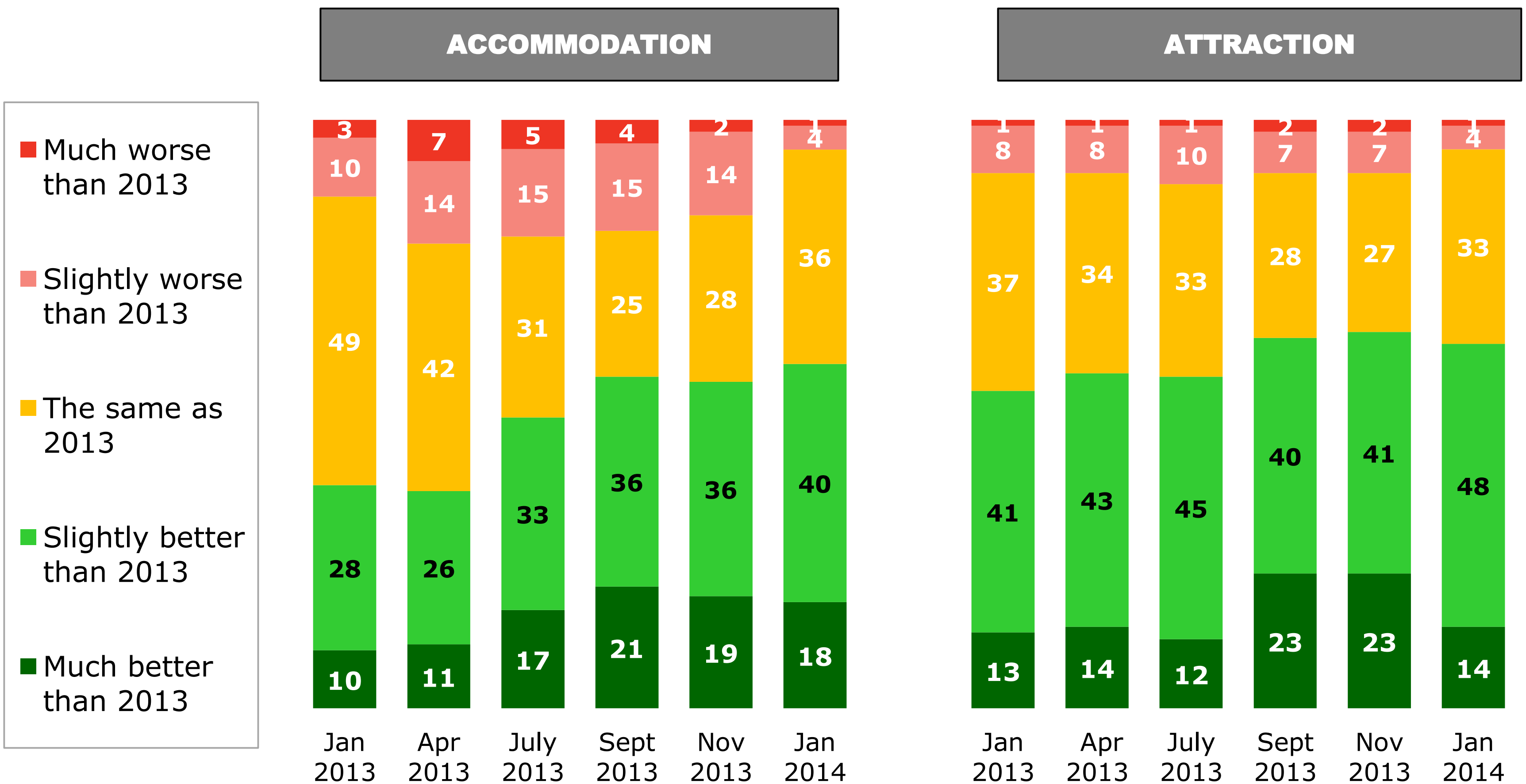


VisitEngland

Business Confidence

Business optimism for 2014

Optimism for 2014 to be more successful than 2013 remains on a similarly high level with well over half of both accommodation and attraction businesses saying that it will be better than 2013.

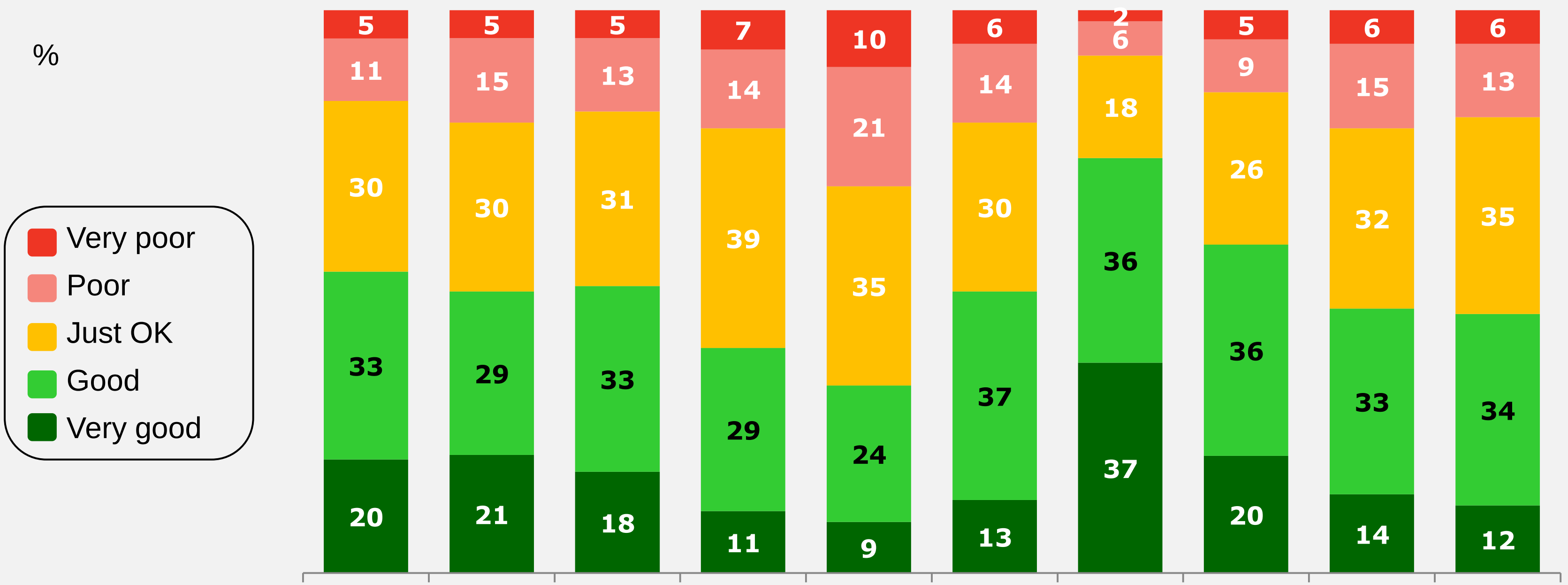


VisitEngland

Q15

Advance booking levels: Accommodation

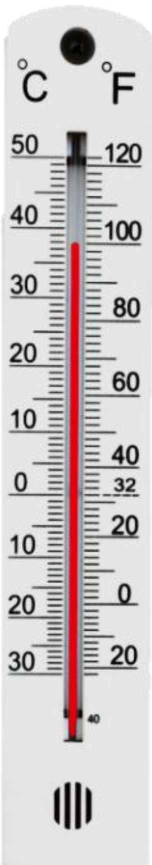
Satisfaction with advance bookings has remained almost identical to the Autumn period, but is a very good improvement on last January when 33% reported good/very good advanced booking levels, compared with 46% this January.

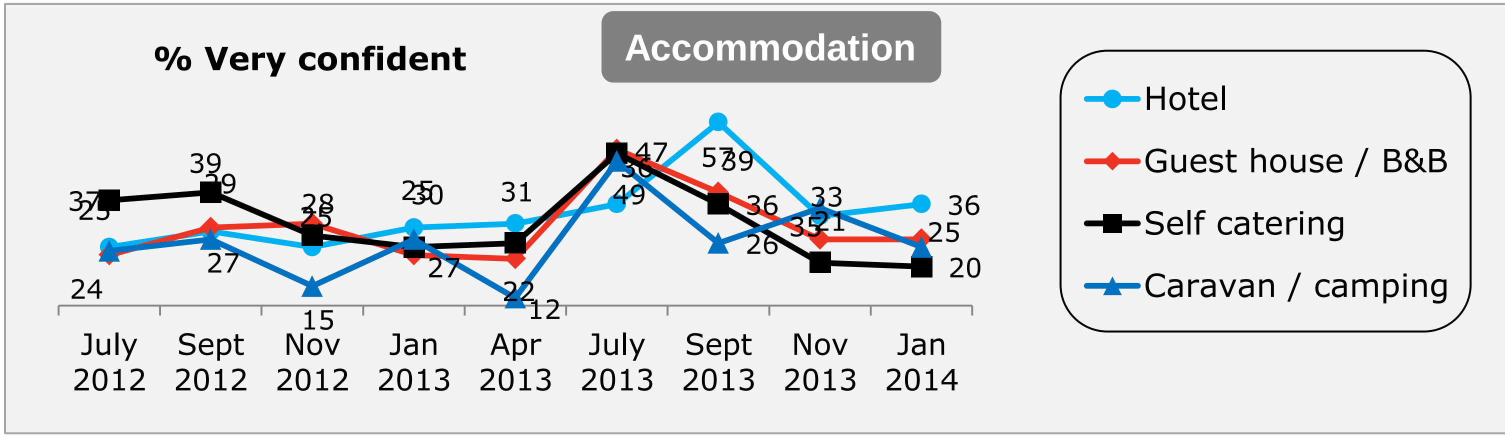


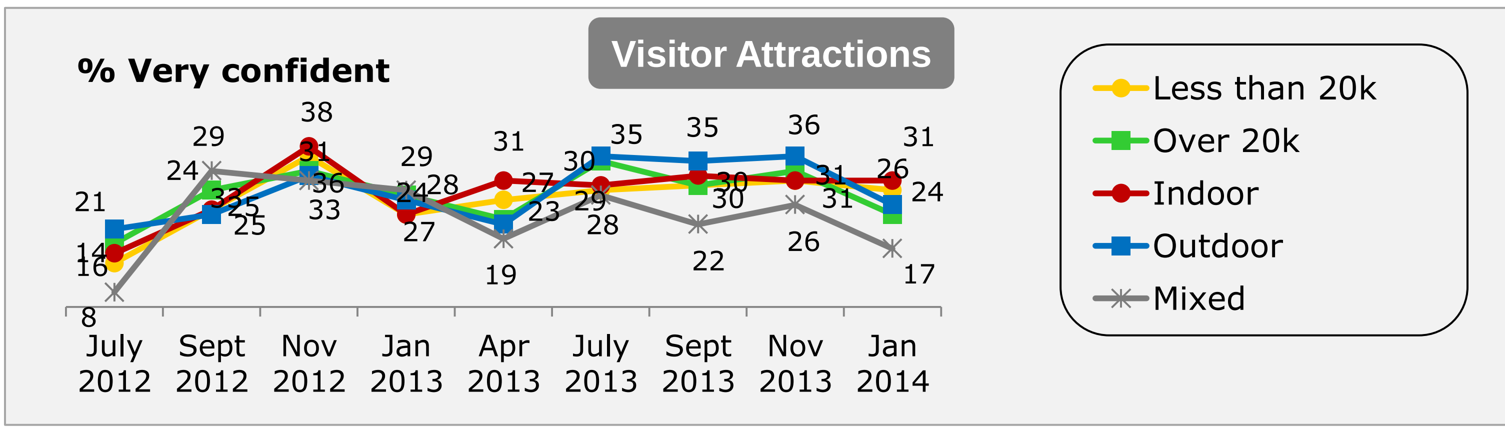
Survey conducted:	June 2012	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014
Period asked about:	Until start of summe r hols	Until end of summe r hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summe r	Until end of summe r hols	Until end of October	Until end of the year	Until the end of Easter

Confidence in performance for forthcoming period: By business type

The outlook for both accommodation and attractions remains fairly stable, although mixed indoor/outdoor attractions are reporting a dip in confidence from Nov '13



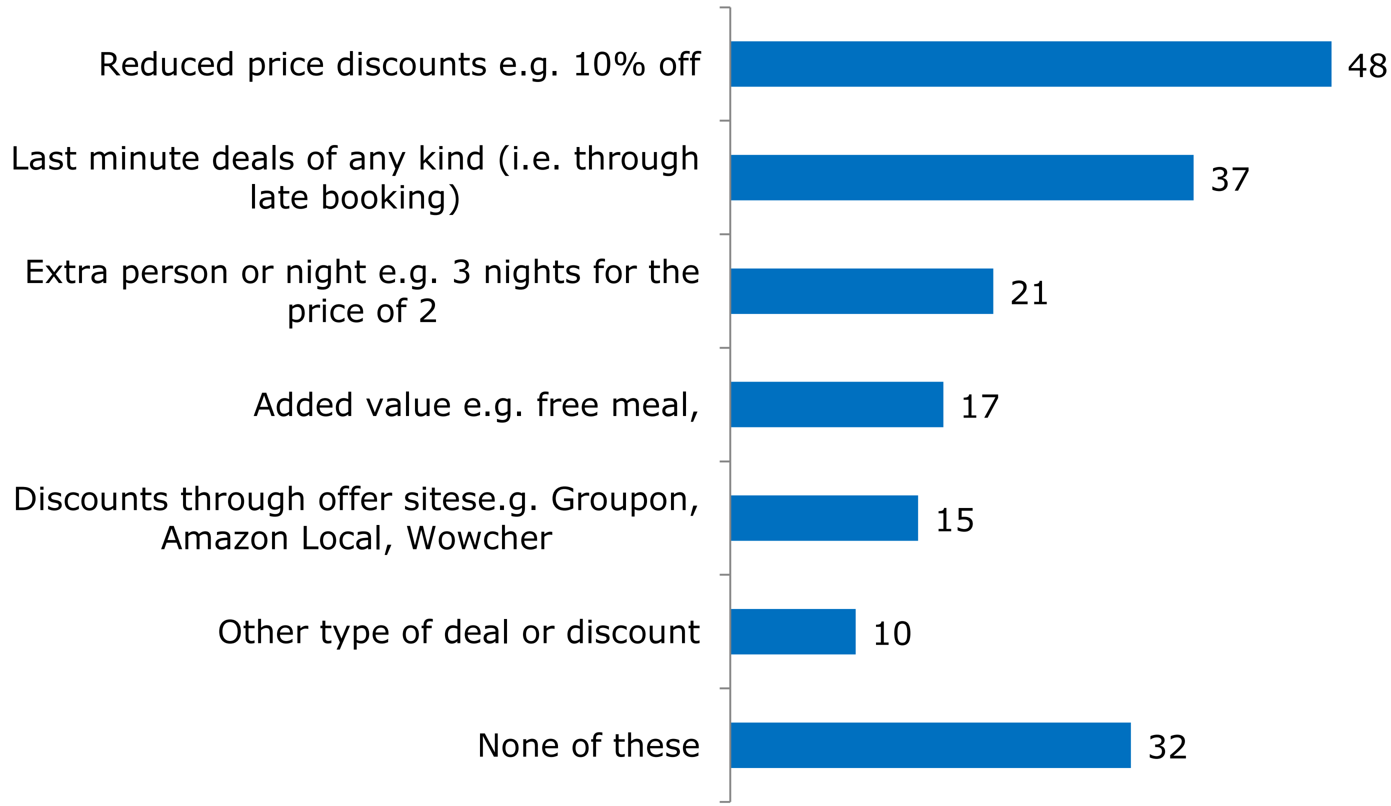




Survey conducted:	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013	Jan 2014
Period asked about:	Until end of summer hols	Until end of Oct	Until the end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of the Summer holidays	Until end of Oct	Until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

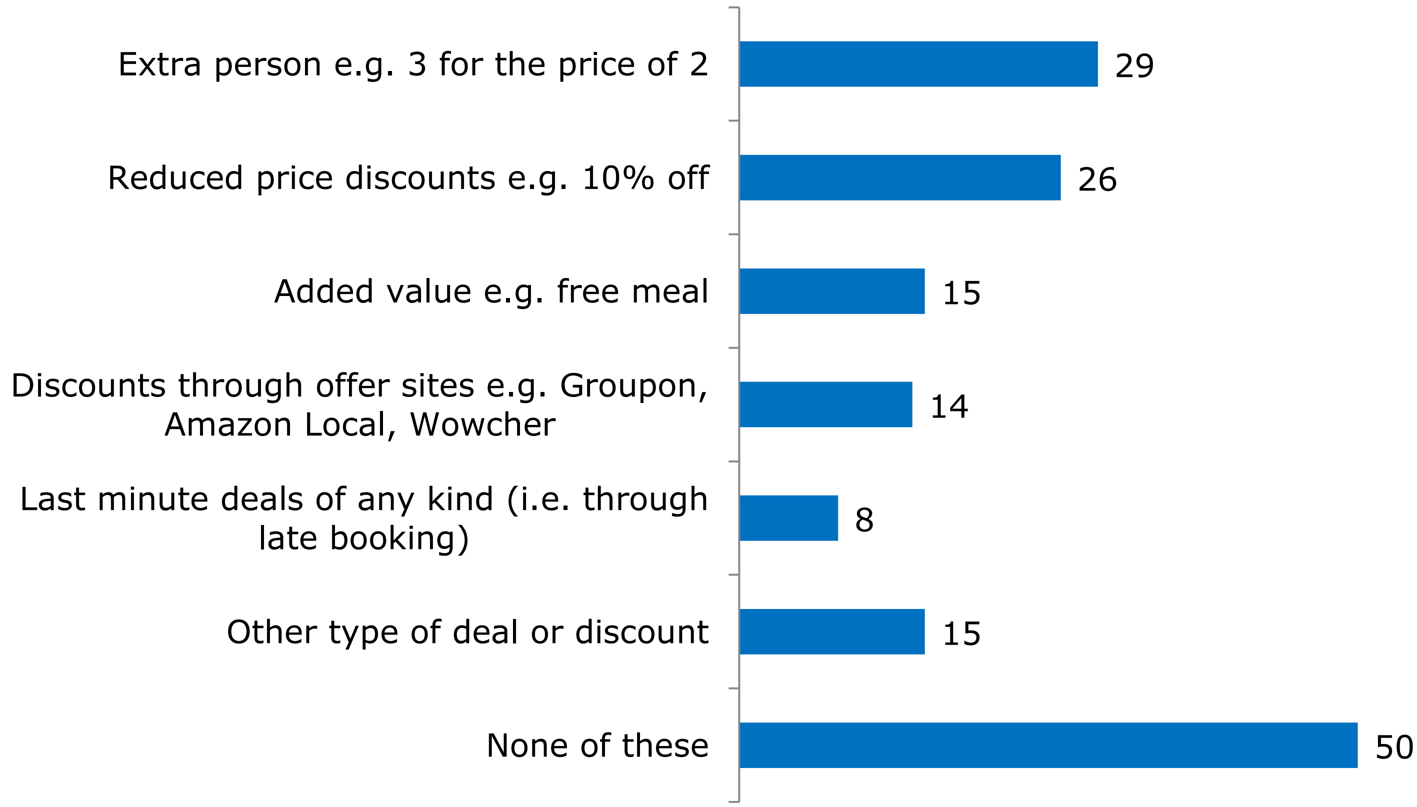
Deals and Discounts during 2013 - Accommodation

Almost half of accommodation businesses offered a reduced price discount during 2013, with last minute deals of any kind being the next most prevalent.



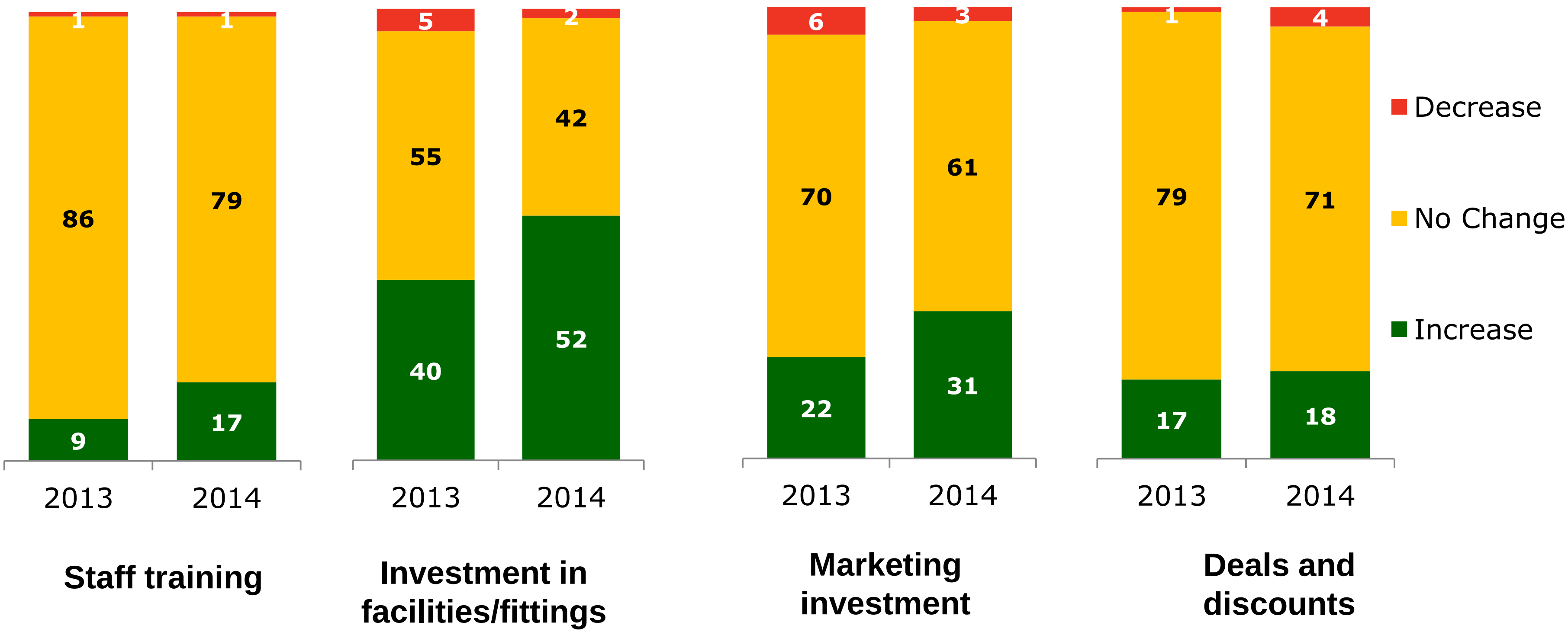
Deals and Discounts during 2013 – Attractions

Half of all visitor attractions did not offer any deals or discounts during 2013, but of those that did an extra person deal was the most likely to be offered, followed by reduced price discounts.



Planned business changes in the coming year: Accommodation

The principal investment of accommodation businesses in 2014 will again be in infrastructure, with over half planning on investing more in it, compared with 40% this time last year. More businesses will be looking to invest in marketing and also there will be some budget being spent on staff training this year.



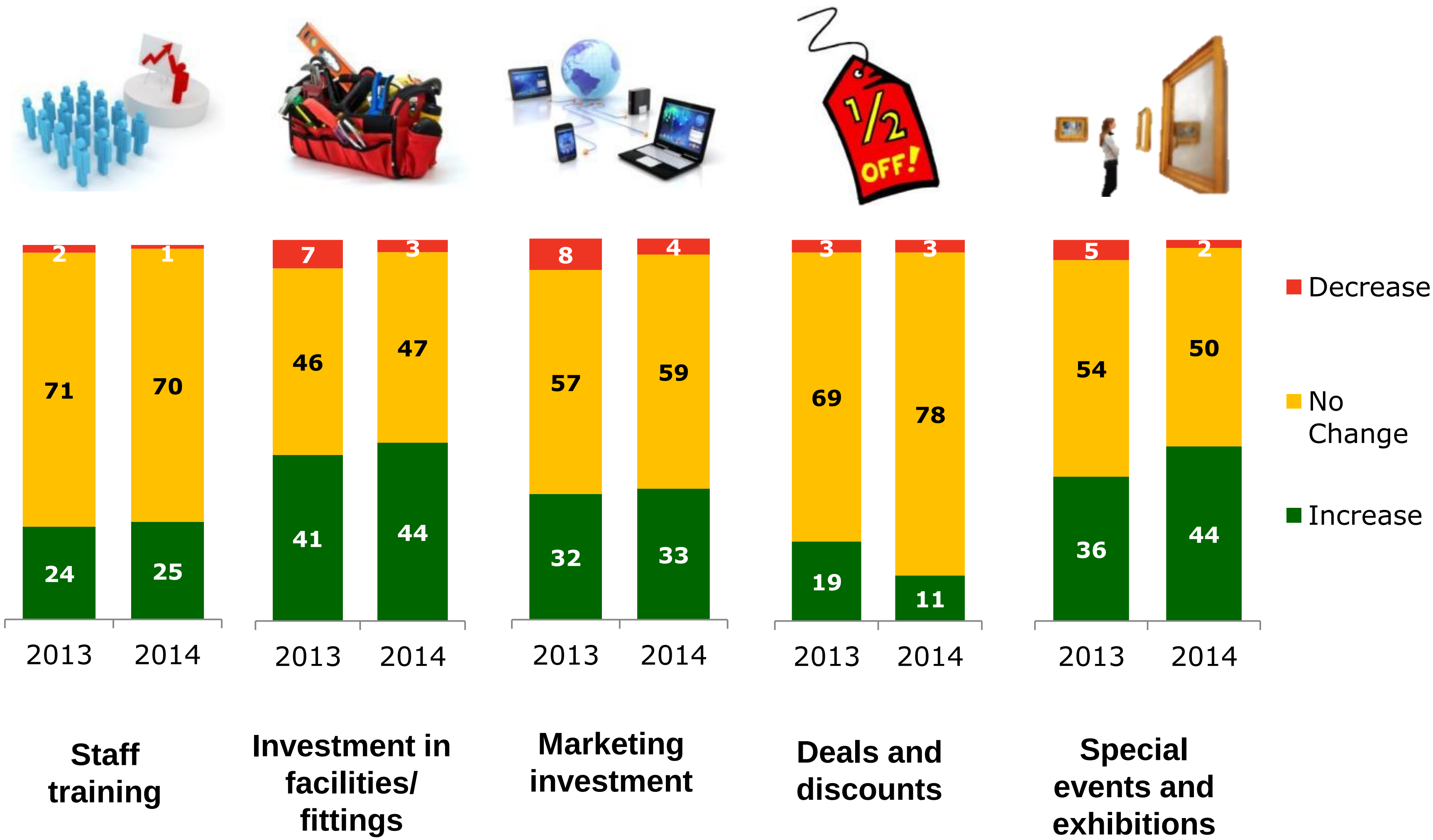
Q18a

VisitEngland

bdrc continental

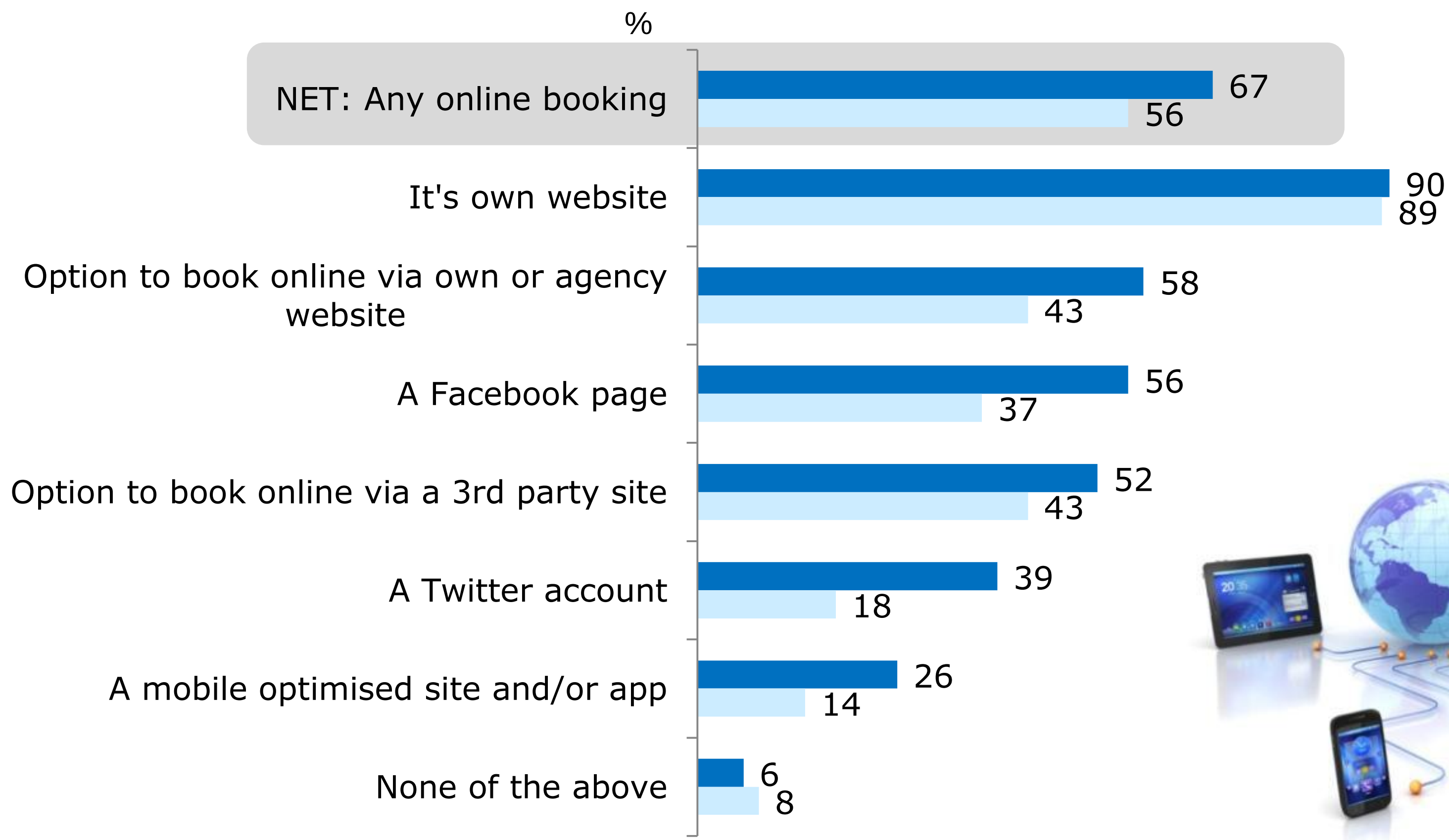
Planned business changes in the coming year: **Attractions**

Investment in infrastructure, special events/exhibitions and marketing is set to increase in 2014, whilst fewer attractions than last year are planning on investing in deals and discounts.



Online and digital marketing tools - **Accommodation**

9 in 10 accommodation businesses have their own website and well over half of these accept online bookings. There has been a big increase in the number of businesses using social media, in particular Twitter, with double the amount of businesses using it this year compared with last year. Mobile optimised sites / apps are also more prevalent this year.



Q18b

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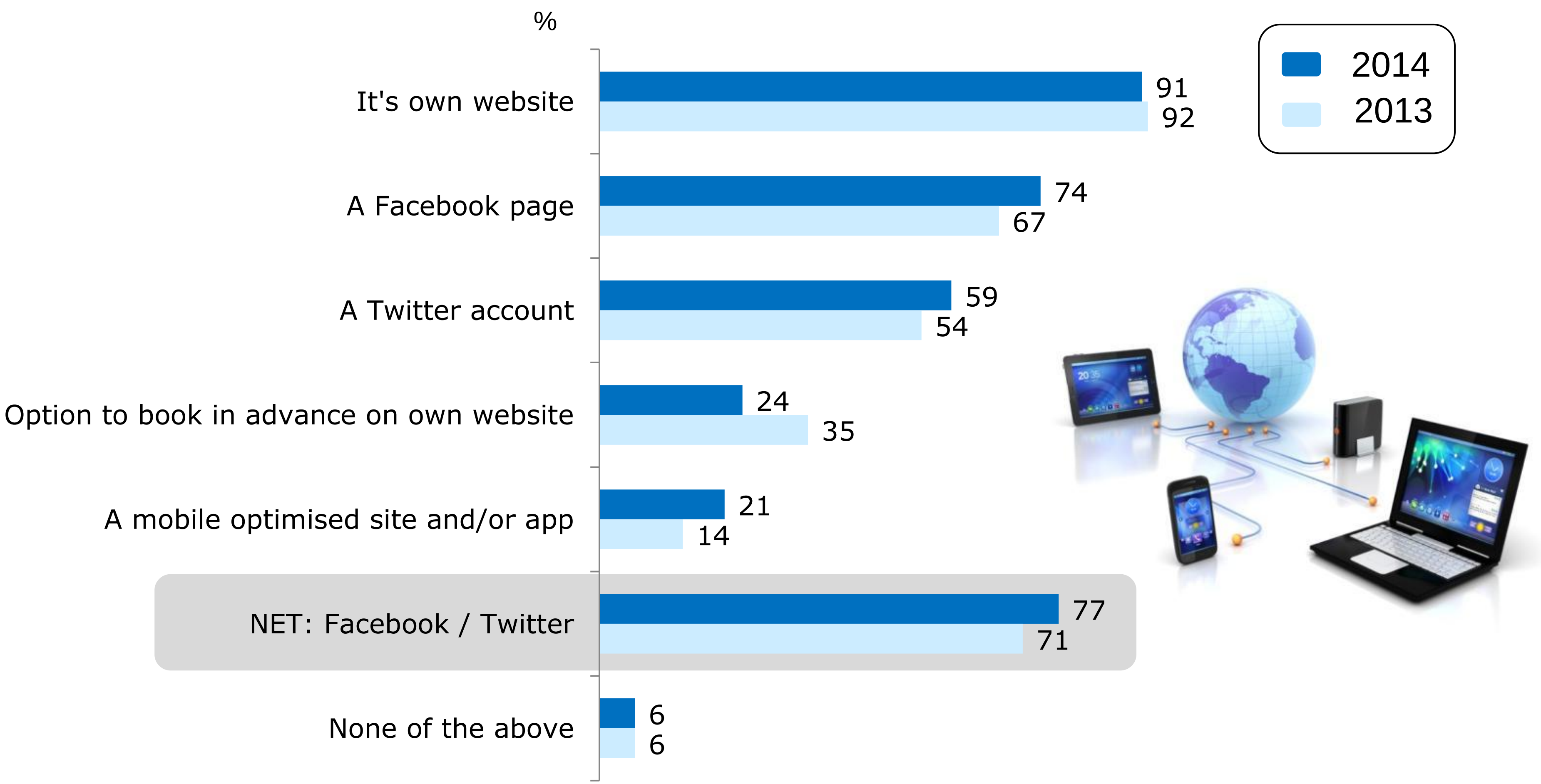
Online and digital marketing tools - Attractions

Attractions are continuing to embrace online and digital marketing tools, in particular social media sites. Fewer attractions this year offer the option to book in advance on their own website.



Q18b

Positive verbatim comments on business confidence

I think we have improved our marketing and we have events on, both public and private events, which will have an impact on future business. (Attractions)

Because we are increasing advertising and looking into TV adverts. We have been increasing our reputation over the years and increasing our social and online presence. (Attractions)

Good because Easter is late this year so it gives you a bit longer to get ready and more chance of the weather getting better (Accommodation)

General uplift of events, the number of events in the city, we have an event here in June and July in 2014 and it will do better than June /July 2013 (Accommodation)

Because we are getting more and more established, we're now number one on trip advisor. We get more word of mouth bookings and we keep trying new things to encourage people to stay (Accommodation)

Negative verbatim comments on business confidence

Not very confident at all. People don't tend to come to the Cotswolds when the weather is poor - it's very seasonal. (Attractions)

There's no one coming in – there's no one around and no one's spending money (Attractions)

The weather has been awful and it looks like it will continue to be awful. (Attractions)

We're struggling; people only book last minute and don't have as much money to spend (Accommodation)

It's looking very poor unless the weather improves, due to hotels etc. giving discounts so people aren't looking for B & B's (Accommodation)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