VisitEngland

Tourism Business Monitor 2013

Wave 3 – Post Easter up until mid-July

Contents

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:

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
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

The late Spring/ early summer period saw a return to the recovery that started at the end of 2012, with more businesses now reporting an increase than those reporting a decrease in visitor numbers. Compared with the same period last year, actual visitor numbers are up by 1% on average for accommodation businesses and by 3% for attractions.

Hotels and B&B sectors are both faring well and the recent spell of good weather seems to have made up for previous poor performance at Caravan/ Campsites and Outdoor attractions. Rural and seaside destinations, being more outdoor focused, have also benefited from the recent clement weather and have also seen an increase in visitor numbers. However, self-catering accommodation is still struggling.

Advance booking levels for accommodation businesses are significantly up, as we would expect for the time of year, and show a significant improvement compared with July 2012. This, together with the improvement in visitor numbers seems to have boosted optimism amongst accommodation businesses, with half of all establishments expecting to operate above 2012 levels during the rest of 2013.

Attractions are also cautiously optimistic looking forward, in particular Outdoor attractions, following strong recent performance.

Three quarters of accommodation businesses now offer internet access in some form, with two thirds offering this access for free. Only a third of attractions currently offer internet access – typically larger and indoor attractions.

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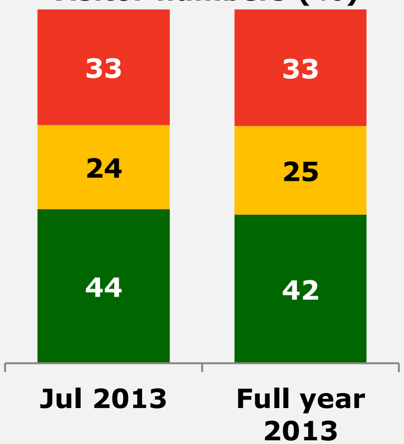
Business Dashboards

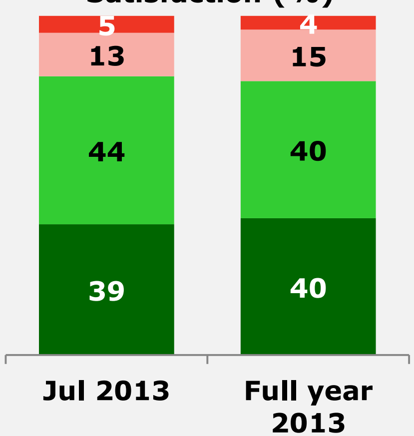
Business Performance Dashboard

Accommodation

Visitor numbers (%)



Satisfaction (%)



Versus same period previous year…

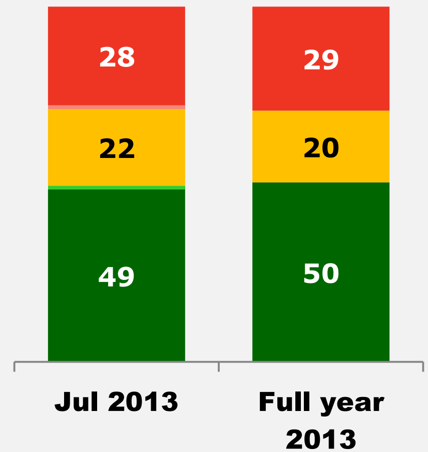
- Down
- Same
- Up

Satisfied with business performance…

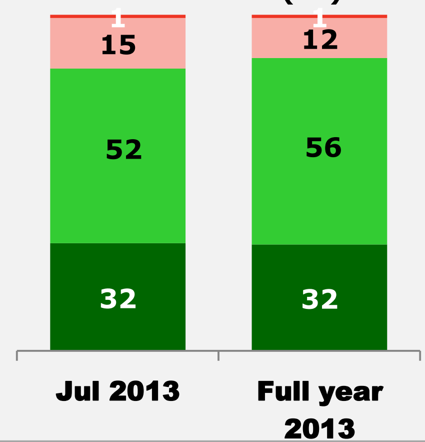
- Not at all
- Not very
- Quite
- Very

Visitor Attractions

Visitor numbers (%)



Satisfaction (%)



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
July 2013: After Easter holidays until mid-July

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
Jan 2013	Until the end of Easter
Apr 2013	Until end of Spring / early Summer
July 2013	Until the end of the Summer holidays

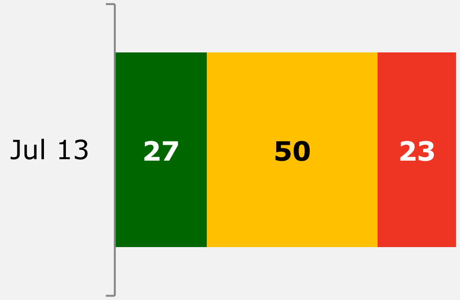
Visitor Profile

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

Up | Same | Down

NET: Up - Down

Domestic visitors



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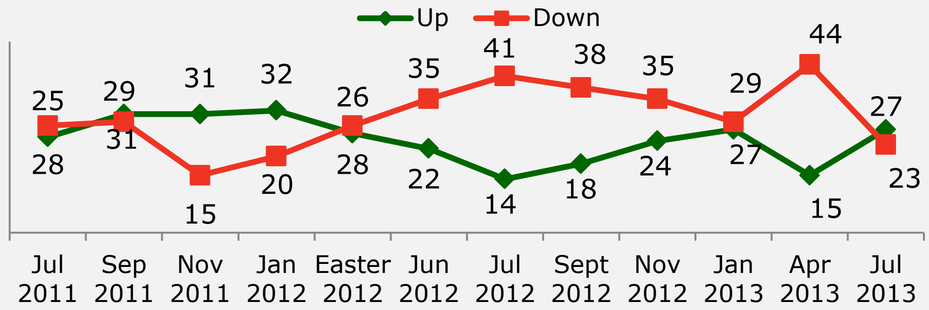
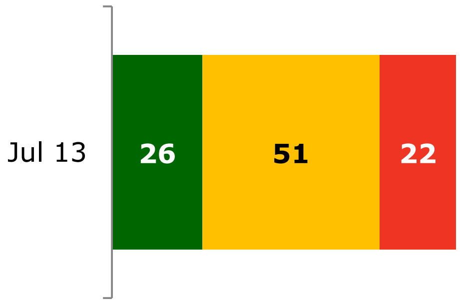


Overseas visitors



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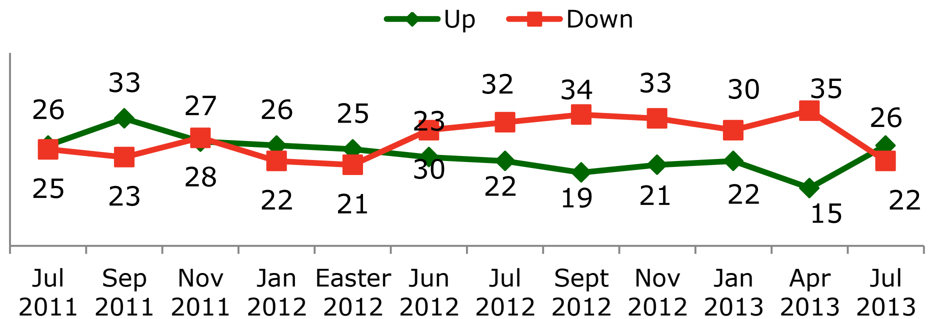
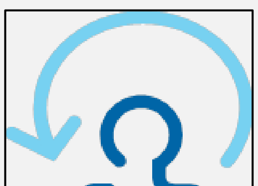
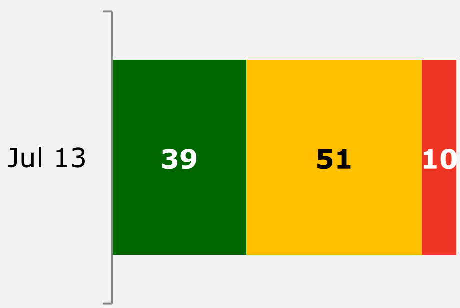
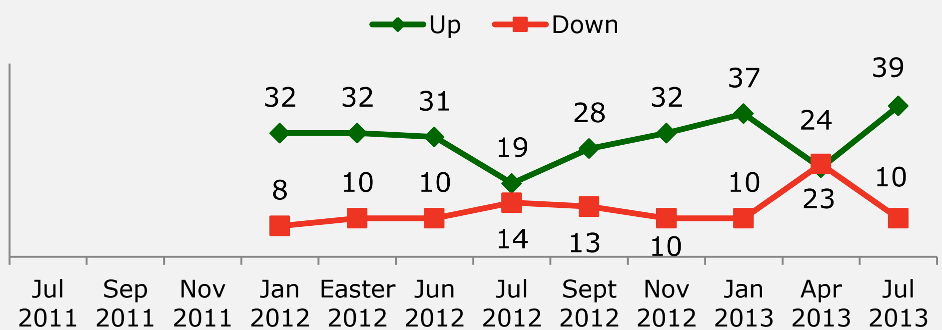




Repeat visitors



+29



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2013: After Easter holidays until mid-July

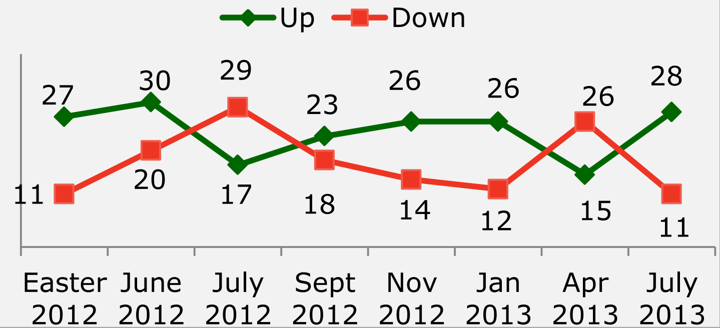
Changing Visitor Profile (year-to-date vs. previous year): Attractions

Up Same Down

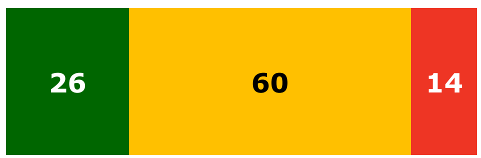
NET: Up - Down

Jul-13

+17



Jul-13



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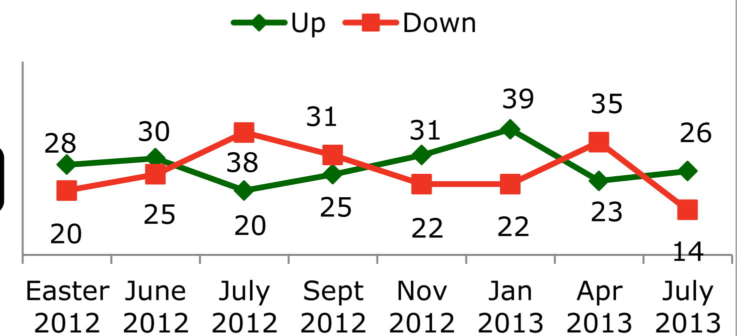
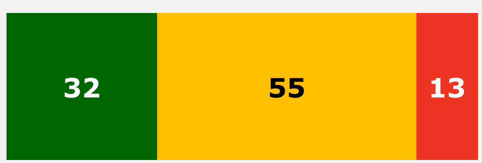


Jul-13



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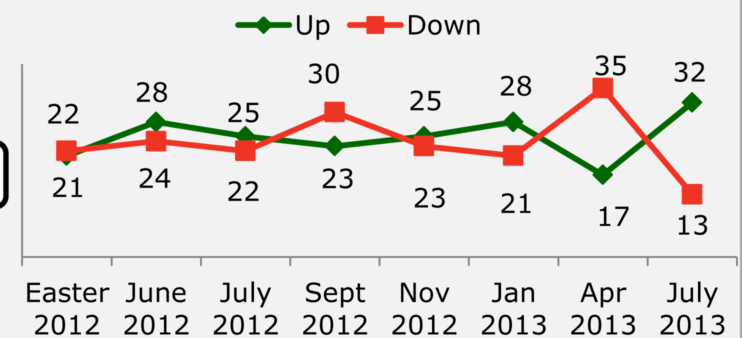

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PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jul 2013: After Easter holidays until mid-July

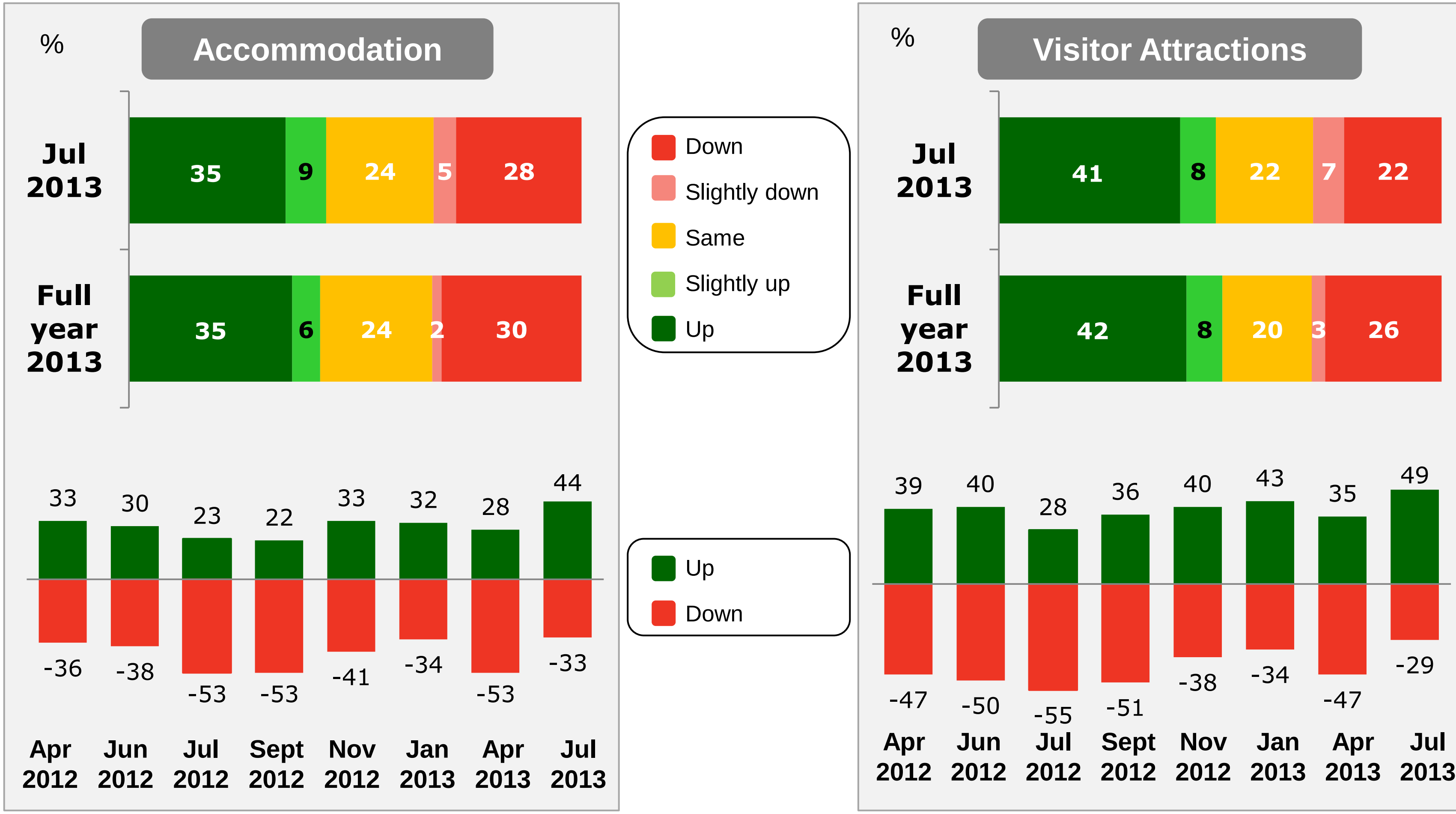
bdrc continental

Q13

Business Performance

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

The late Spring/ early summer period saw a return to the recovery that started at the end of 2012, with more businesses now reporting an increase than those reporting a decrease in visitor numbers.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
July 2013: After Easter holidays until mid-July/ **Apr 13** January until the end of the Easter holidays**. Jan 2013:** Christmas and NY period 2012/ **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

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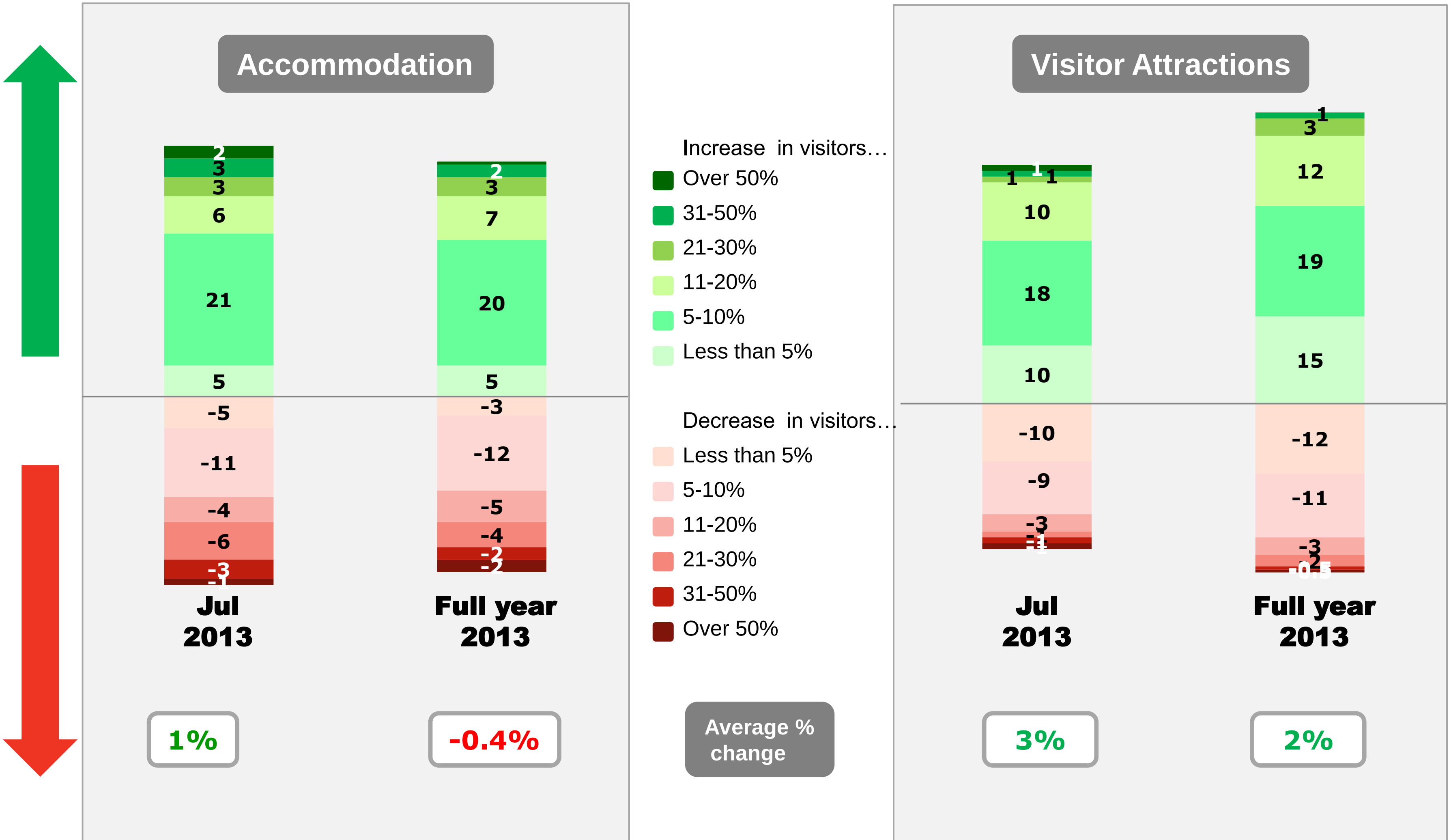
Q3/4 & Q7/8

bdrc continental

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

Compared with the same period last year, actual visitor numbers are up by 1% on average for accommodation businesses and by 3% for attractions.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
July 2013 After Easter holidays until mid-July

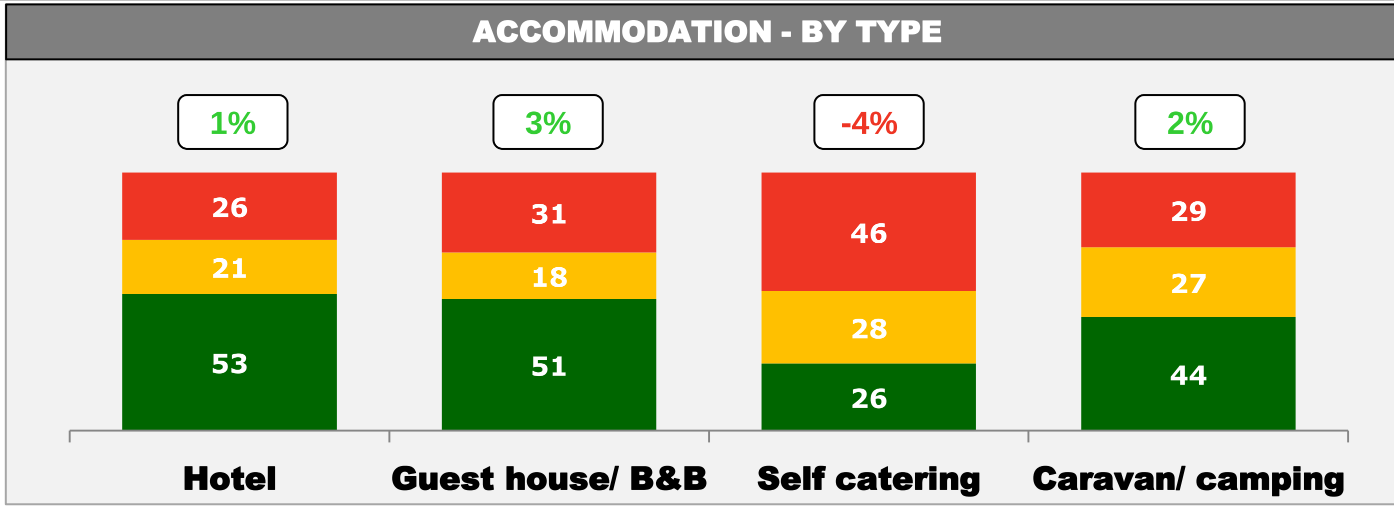
Changing business performance: By business type

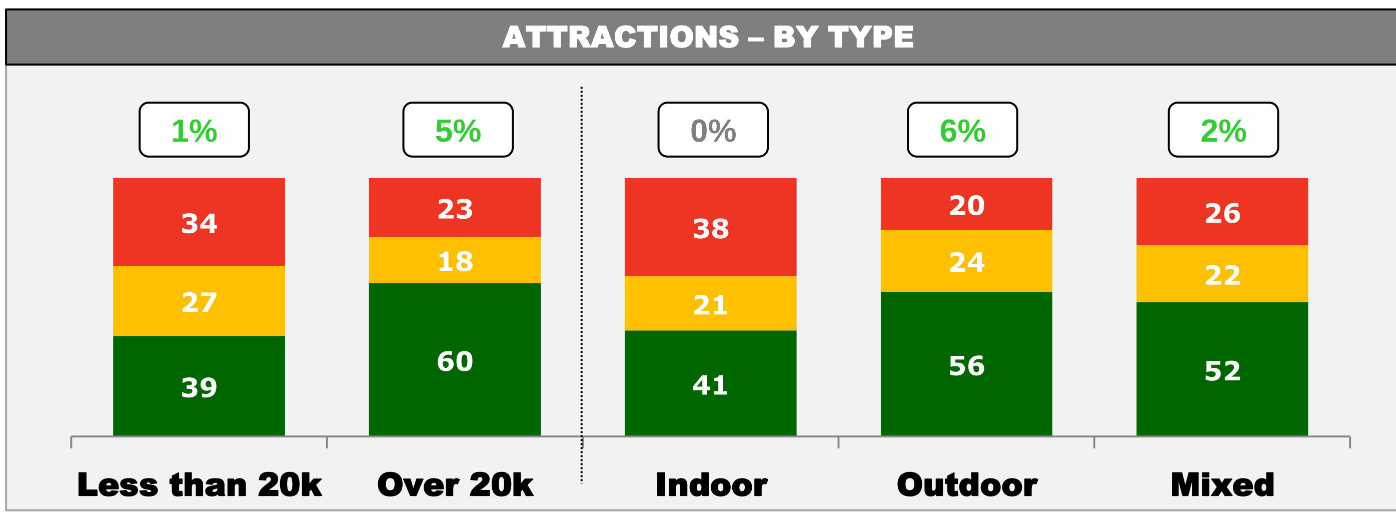
Hotels and B&B sectors are both faring well and the recent spell of good weather seems to have made up for previous poor performance at Caravan/ Campsites and Outdoor attractions. However, self-catering accommodation is still struggling.

Versus same period previous year…

% of businesses:
- Down
- Same
- Up

% change in visitor numbers:





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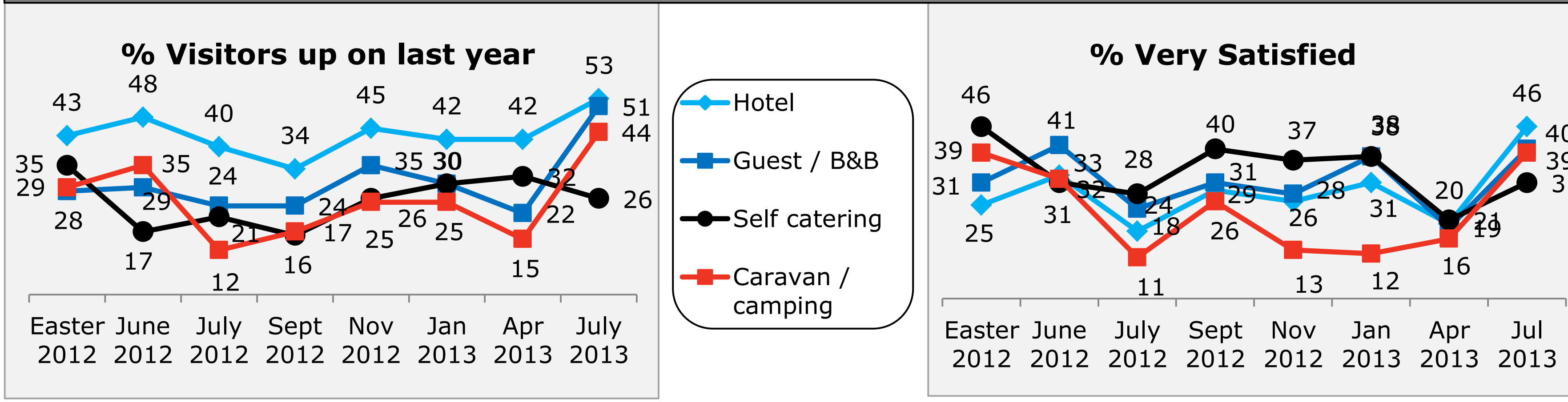
bdrc continental

Q3/4, Q5

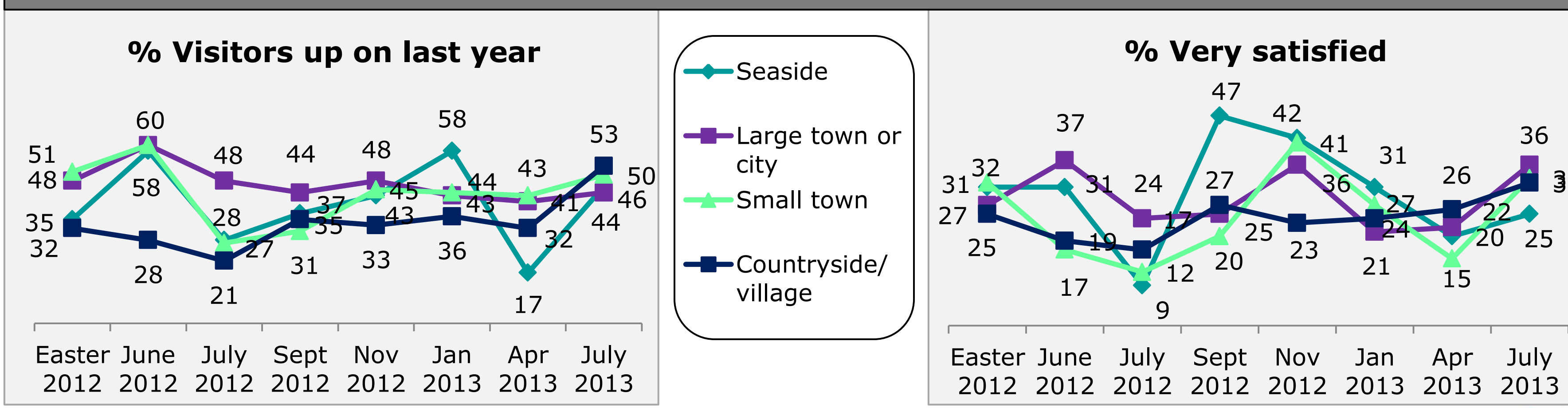
Changing business performance: By business type

The early summer period saw the most positive year on year improvement in accommodation visitor numbers reported since Easter 2012 for all except self catering accommodation.
Rural and seaside destinations, being more outdoor focused, have benefited from the recent clement weather and have also seen an increase in visitor numbers.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE



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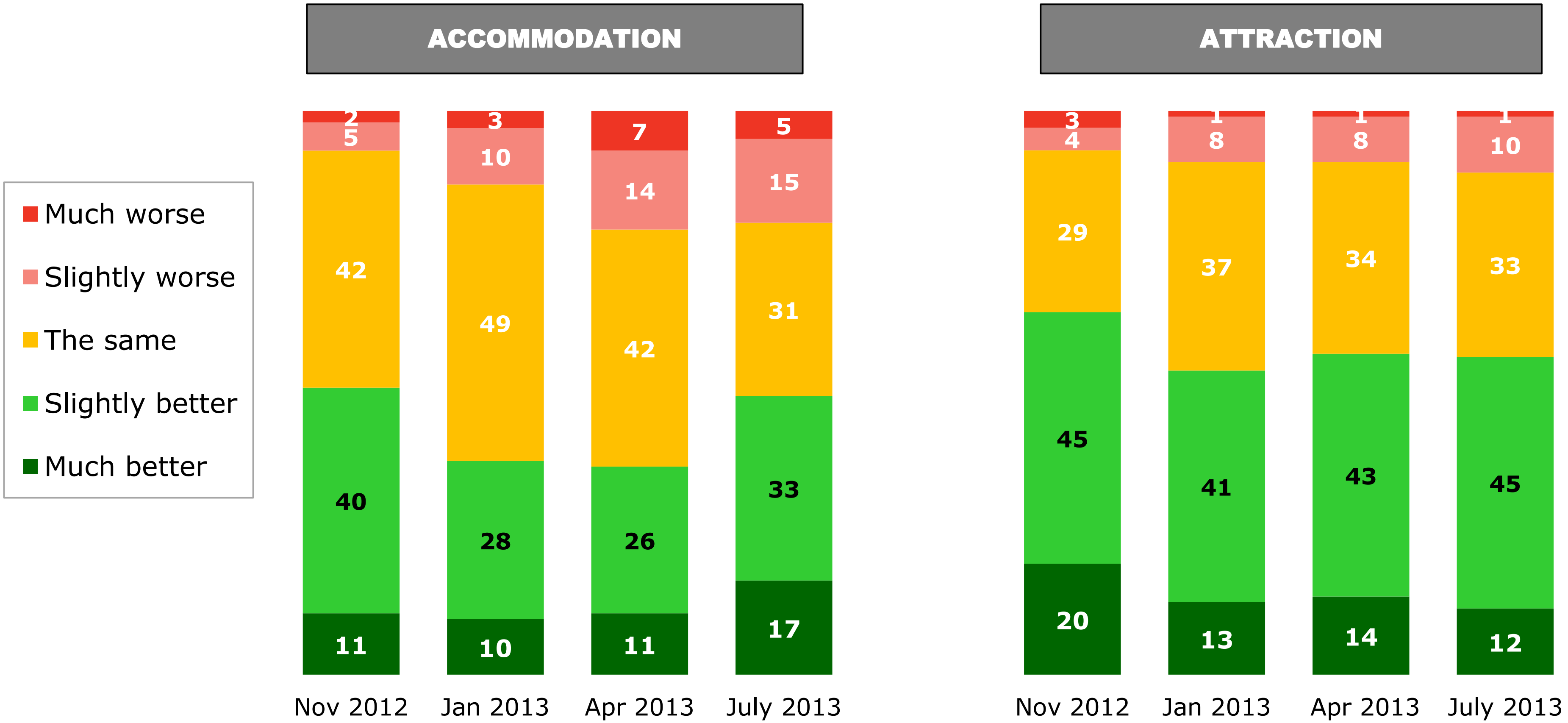
Business Confidence

Business optimism for 2013

Improvements in visitor numbers and advance bookings have boosted business optimism, with half of all accommodation businesses expecting to operate above 2012 levels during the rest of 2013. Attractions are also cautiously optimistic.



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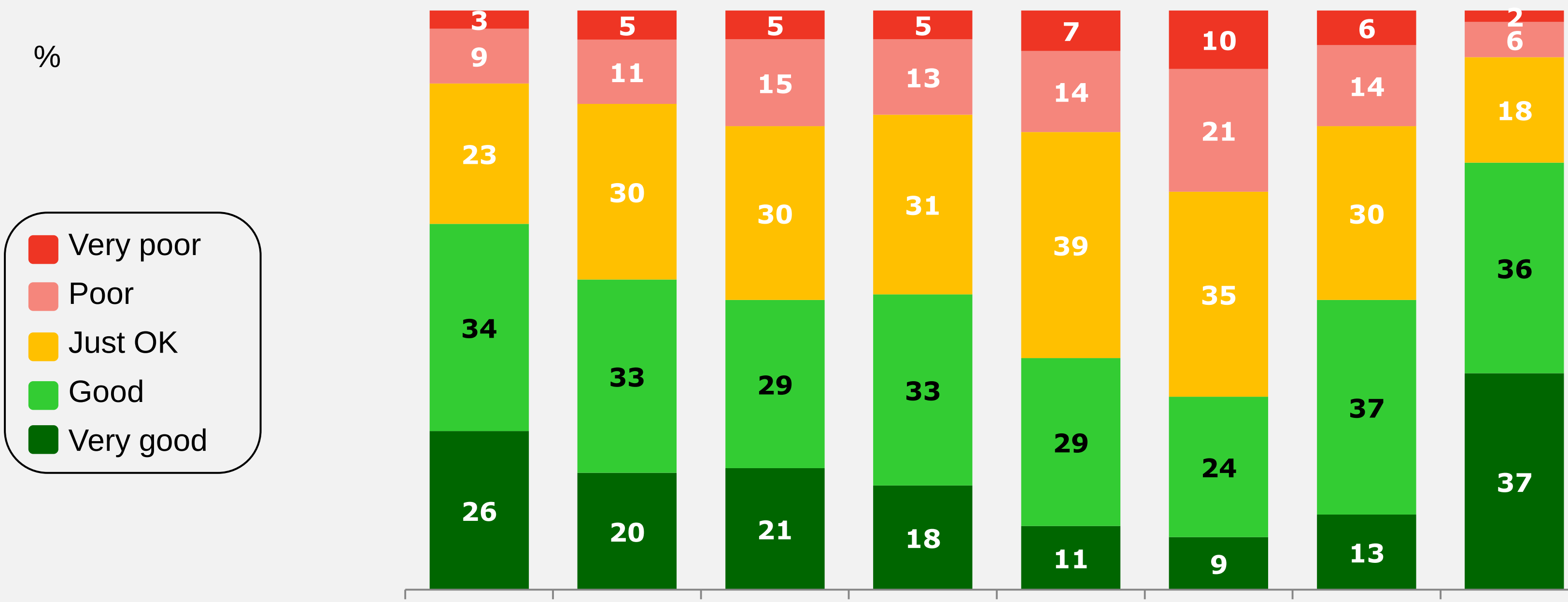
Q15

Advance booking levels: Accommodation

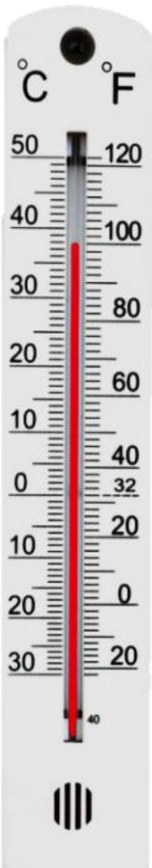
Advance booking levels are significantly up, as we would expect for the time of year, and show a significant improvement compared with July 2012.

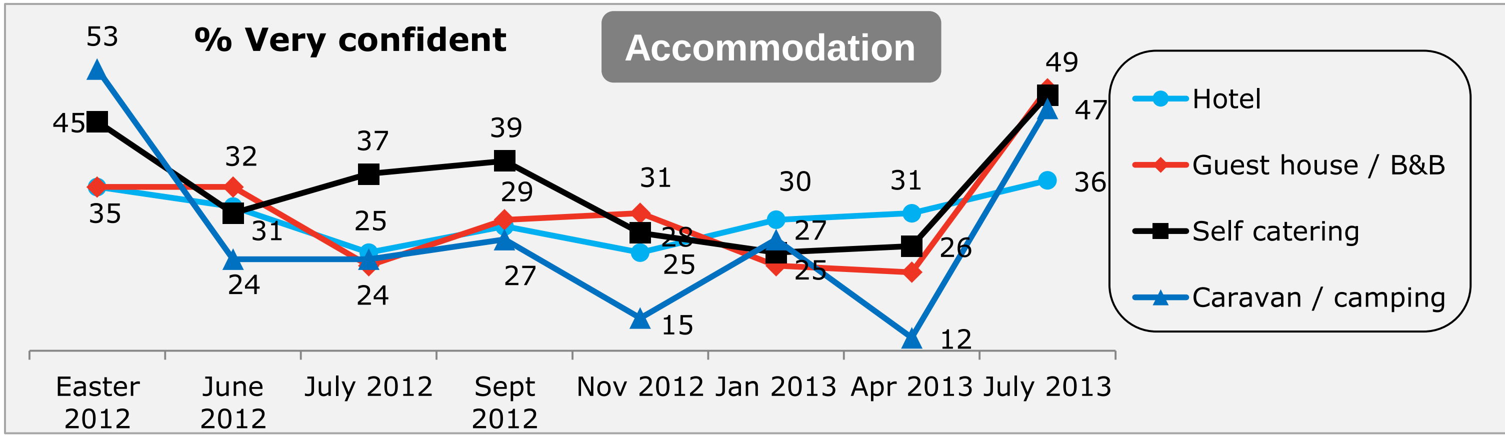


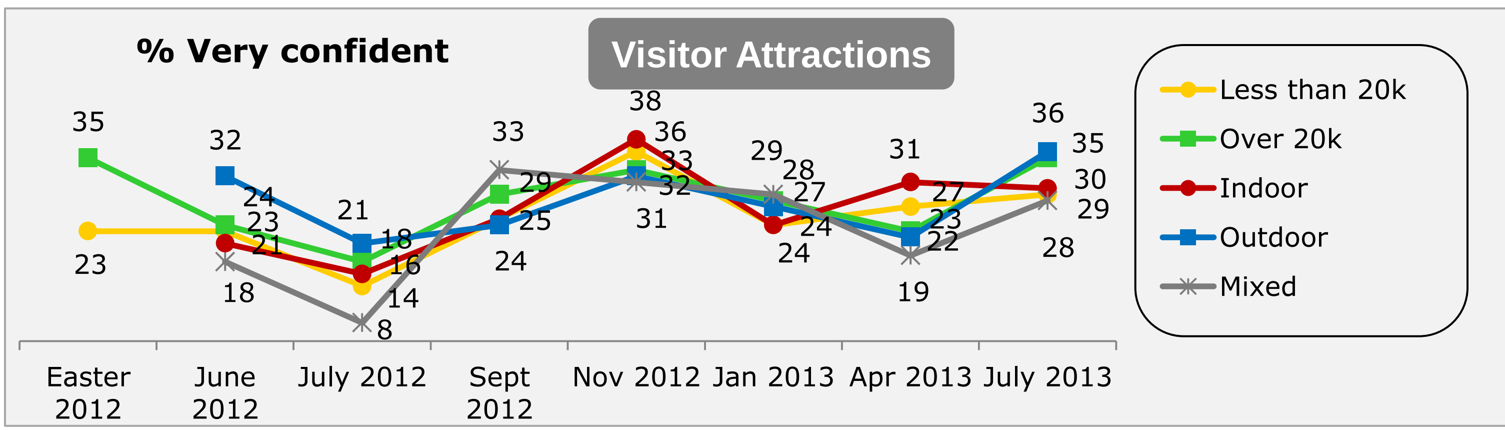
Survey conducted:	Easter 2012	June 2012	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013
Period asked about:	Until after Jubilee bank hol	Until start of summer hols	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	After Easter hols until Mid-July

Confidence in performance for forthcoming period: By business type

The increase in advance bookings has bolstered confidence across all accommodation sectors.
Outdoor attractions are the most confident about the summer holiday period, following strong recent performance.







Survey conducted:	Easter 2012	June 2012	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013
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	Until the end of Easter	Until late Spring/ early Summer	Until the end of the Summer holidays

Q13

Positive verbatim comments on business confidence

“

Bookings are looking good until January. I think our accommodation appeals to people who want to get away from boring town life and it’s paradise here - that's why people rebook.
(Accommodation)

Things are looking good - we've just gone onto online booking and we’re building a new website. (Accommodation)

Year on year we're building on our success and we are getting more publicised and offering a better product. (Attraction)

Well we have a new exhibition coming up next week and also the summer holidays are always our busiest period where families are together and have more time. We have craft activities throughout the summer holidays which will be attended by young families. (Attraction)

”

Negative verbatim comments on business confidence

Not very good prospects at the moment as I think people are looking after their money more and spending less. (Accommodation)

Pretty doubtful but I cant judge because people are doing everything last minute nowadays. They don't want to pay - everybody argues about every penny! (Accommodation)

Very worried because of the lack of business there is around (Accommodation)

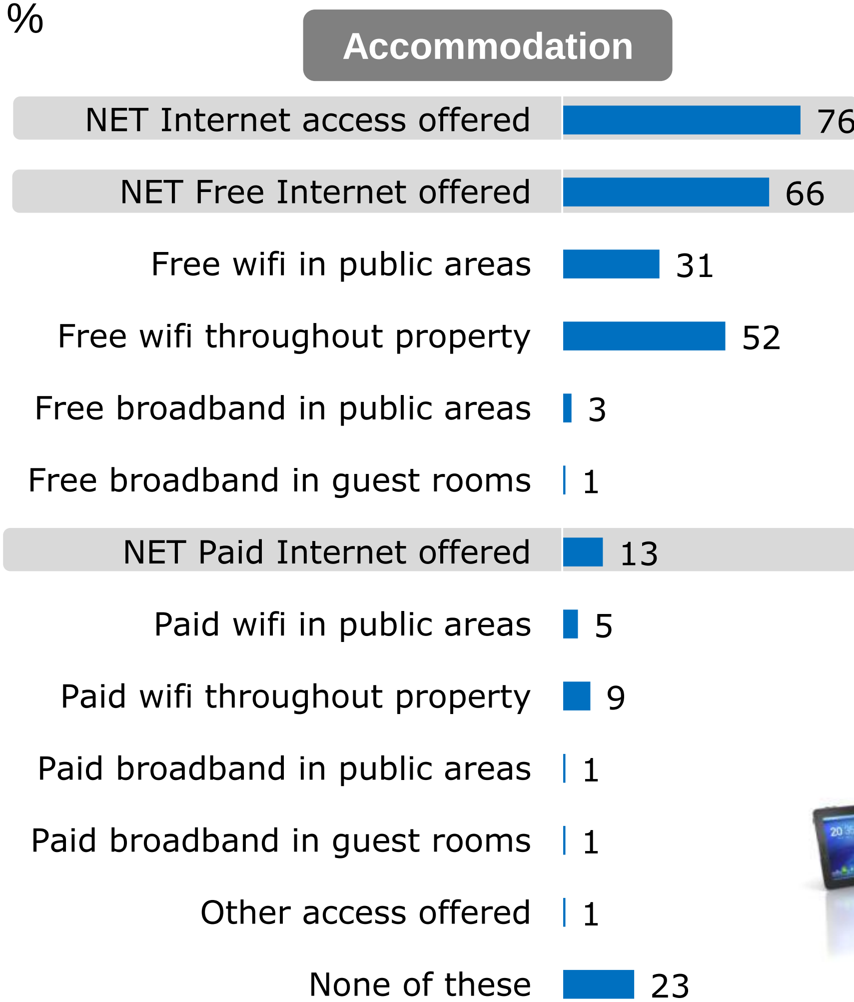
We're not all that confident as the visitor numbers are not there anymore - that shows in the footfall (Attraction)

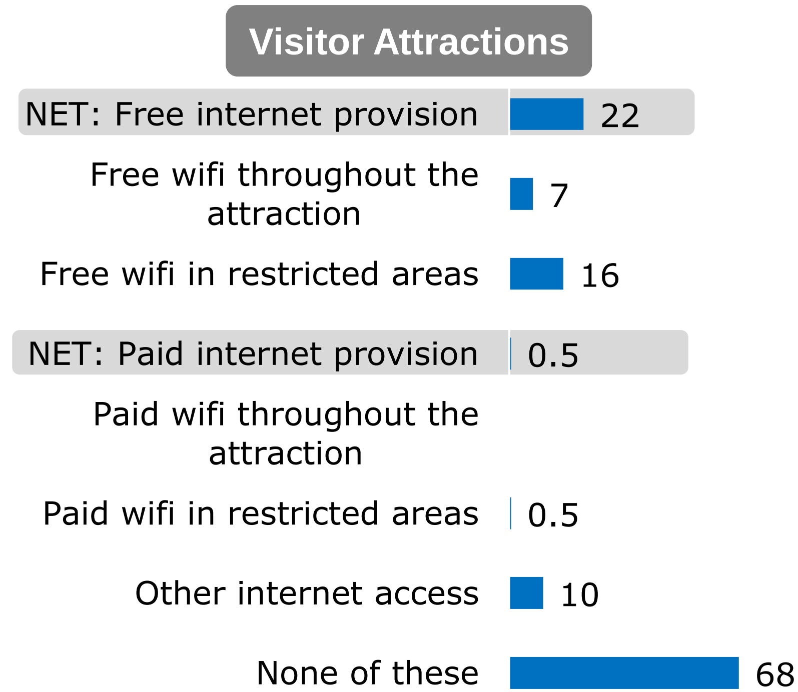
Not very confident because of the unpredictability of the weather. (Attraction)

Internet Provision

Three quarters of accommodation businesses now offer internet access in some form, with two thirds offering this access for free.
Only a third of attractions currently offer internet access. It is more likely to be offered at larger and indoor attractions.

%





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