VisitEngland

Tourism Business Monitor 2013

Wave 5 – Mid-September until the end of October

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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:

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

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

Key Findings

There is a natural fall-back from the highs reported in the Summer period amongst both accommodation businesses and visitor attractions. However, visitor/guest numbers are still good, and over half of both business types are reporting an increase in visitors for this latest period compared with the same period last year. This is reflected in overall satisfaction levels.

The actual number of guests/visitors has risen by 3% for both accommodation businesses and visitor attractions during the period from mid-September through to the end of October. The year to date performance across both sectors remains buoyed by the success of the Summer period.

Growth is evident across all business types with the exception of self-catering businesses, who have seen a 2% decrease in their guests compared with last year.

The growth seen for the majority of business types is driven by a continued increase in all visitor types, but accommodation businesses have seen less growth this period amongst the overseas visitor sector.

Optimism for "2013 to be more successful than 2012" remains on a similarly high level to the Summer period for both business types, likely still buoyed by the increase in visitors over Summer

Satisfaction with advance bookings for accommodation businesses has dropped following the summer holidays, but remain similar to Spring this year and stronger than the same period last year (Nov 12).

The outlook for attractions remains fairly stable, but accommodation businesses are reporting a more pronounced decrease in confidence for the final part of the year.

Looking to 2014, improvements in guest/visitor numbers in 2013 have boosted business optimism, and over half of businesses, amongst both accommodation and visitor attractions, anticipate 2014 to be a better year than 2013.

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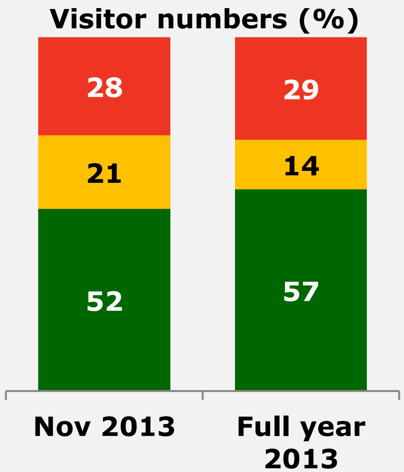
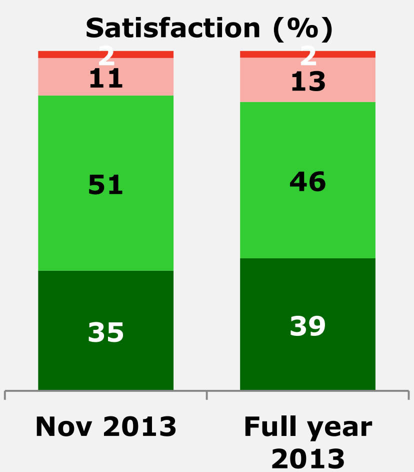
Business Dashboards

Business Performance Dashboard

Accommodation





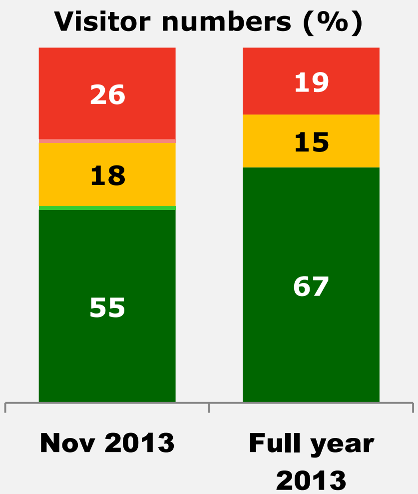
Versus same period previous year…

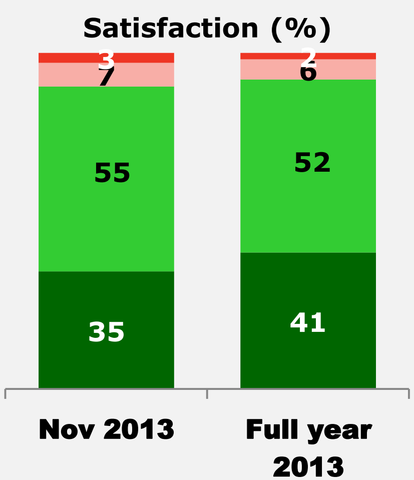
- Down
- Same
- Up

Satisfied with business performance…

- Not at all
- Not very
- Quite
- Very

Visitor Attractions

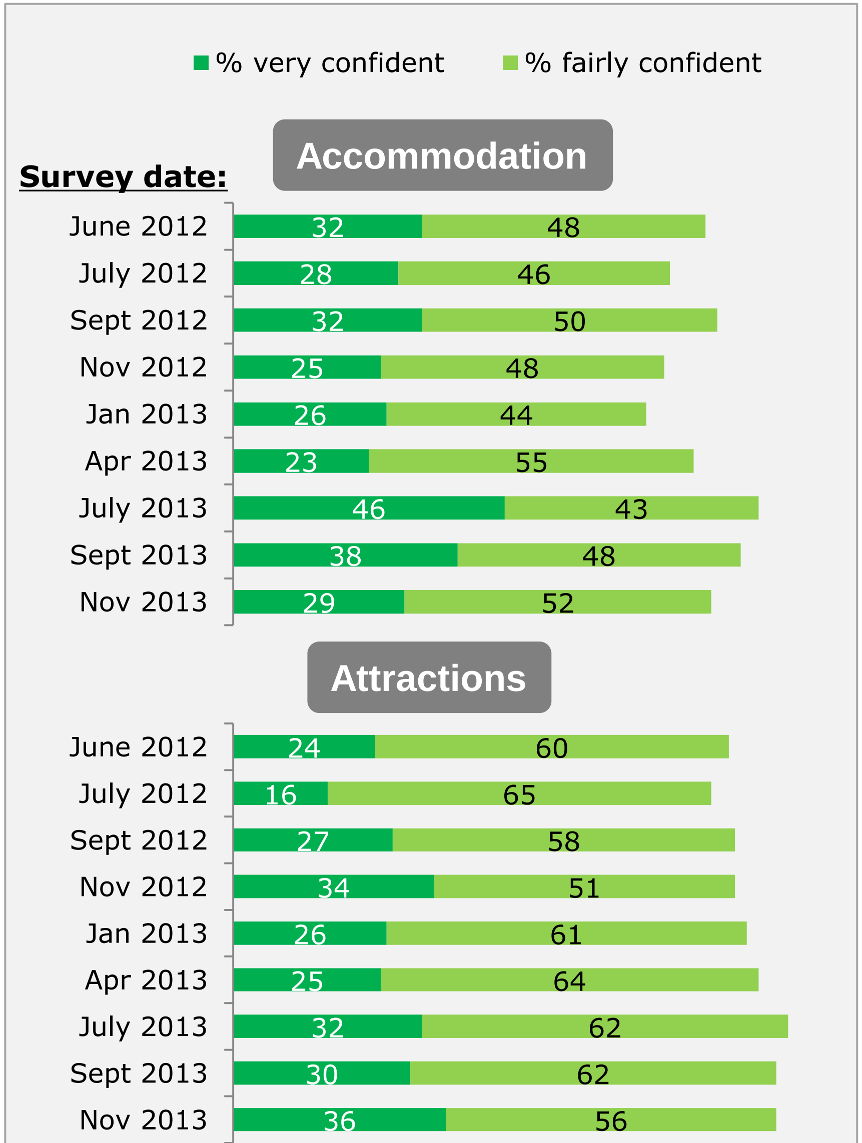




PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2013: Mid-September until the end of October

Q3/4. Q7/8,

Business Confidence Dashboard: confidence for next 1.5-2 months



Period asked about:

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

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Q13

bdrc continental

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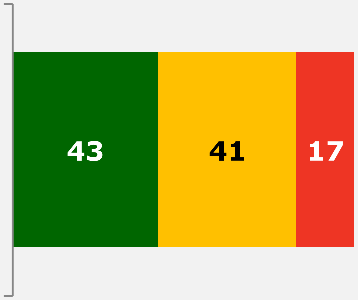
Visitor Profile

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

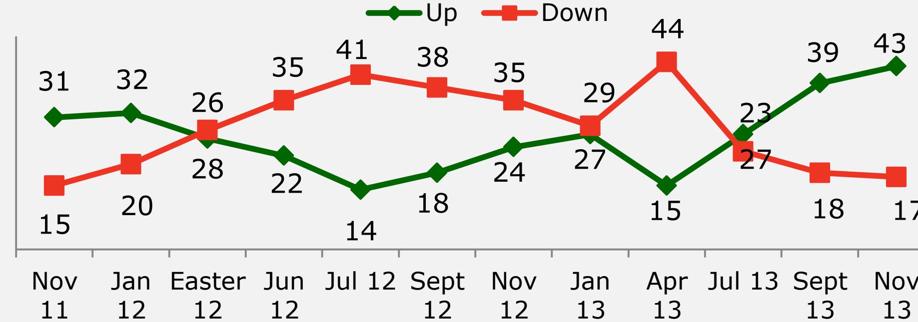
Up | Same | Down

NET: Up - Down

Nov 13

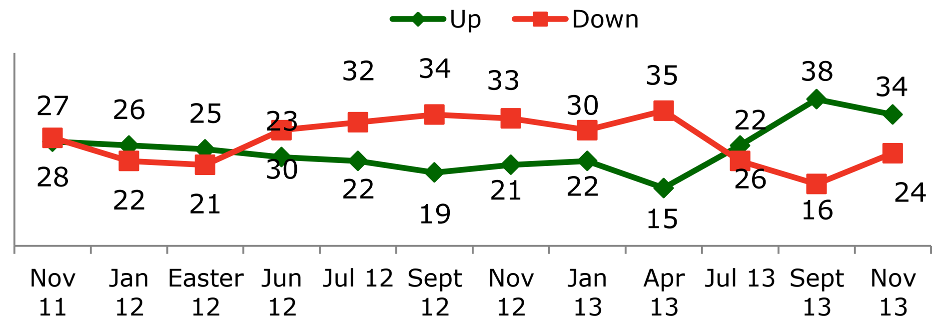


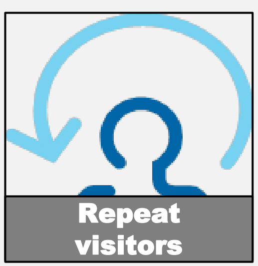
+26



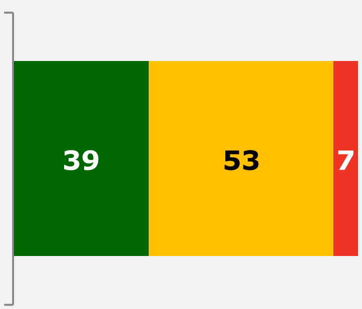
Nov 13

+10





Nov 13



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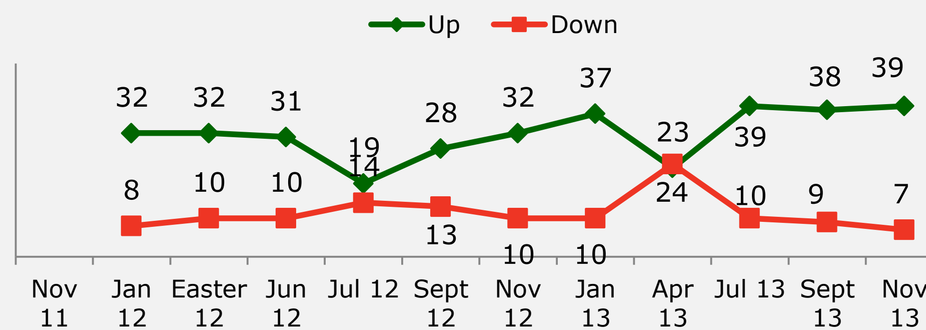


PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2013: Mid-September until the end of October

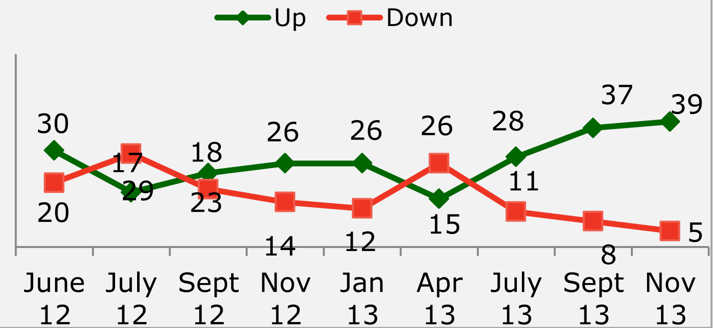
Changing Visitor Profile (year-to-date vs. previous year): **Attractions**

Up | Same | Down

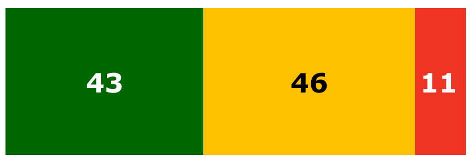
NET: Up - Down

Nov 13

+34



Nov 13



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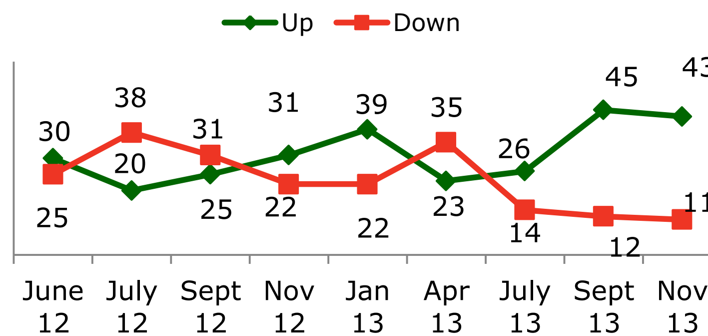
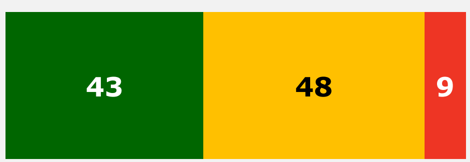


Nov 13



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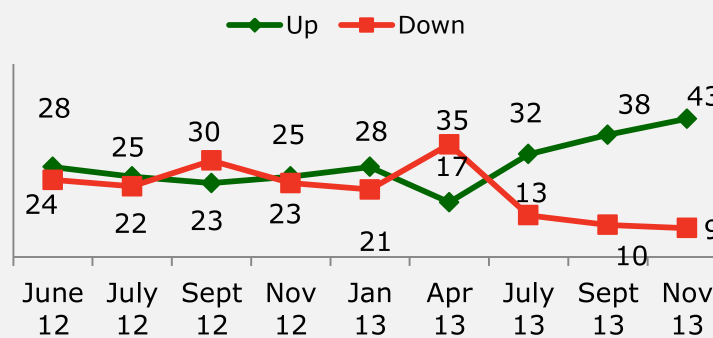

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Nov 2013: Mid-September until the end of October

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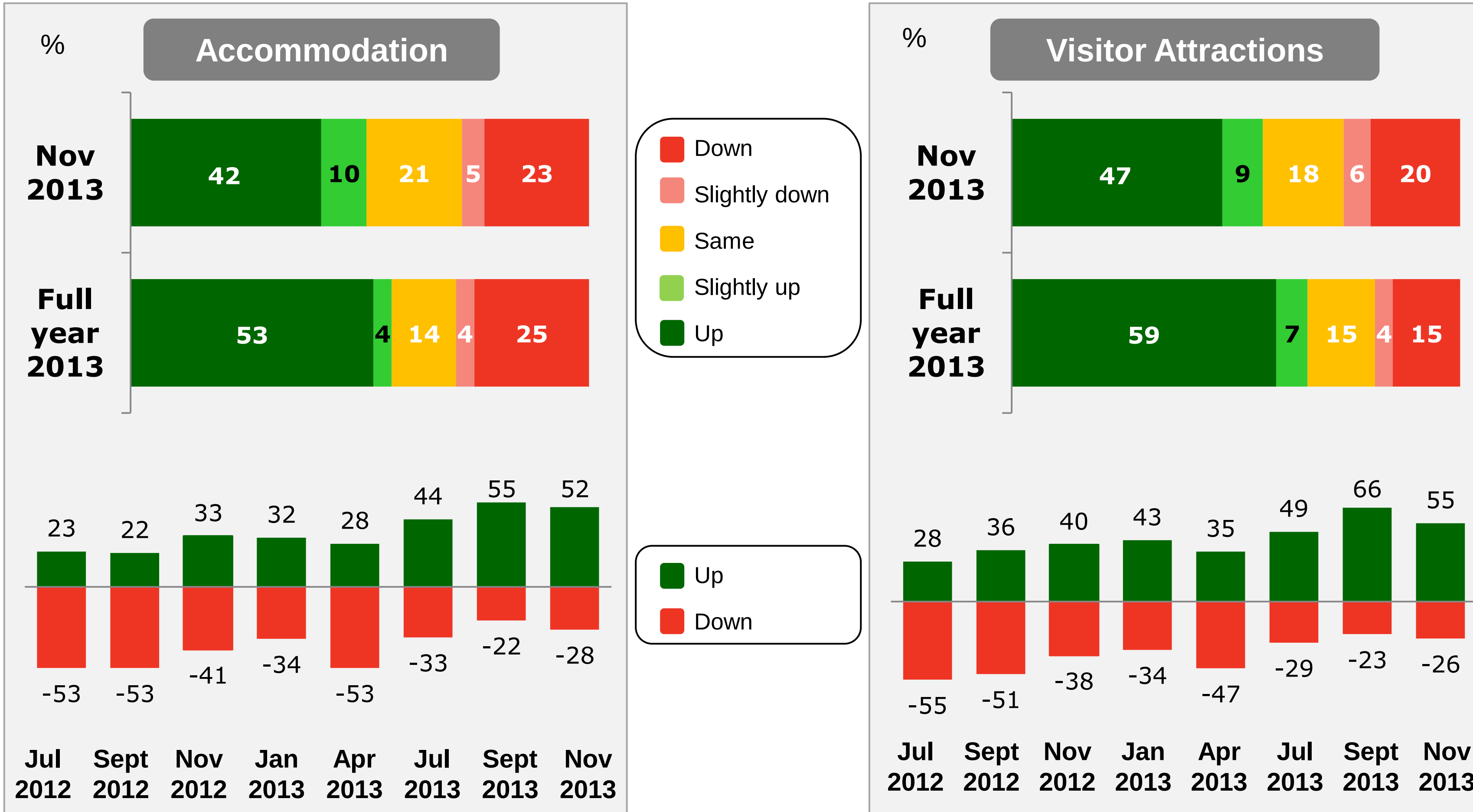
Business Performance

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

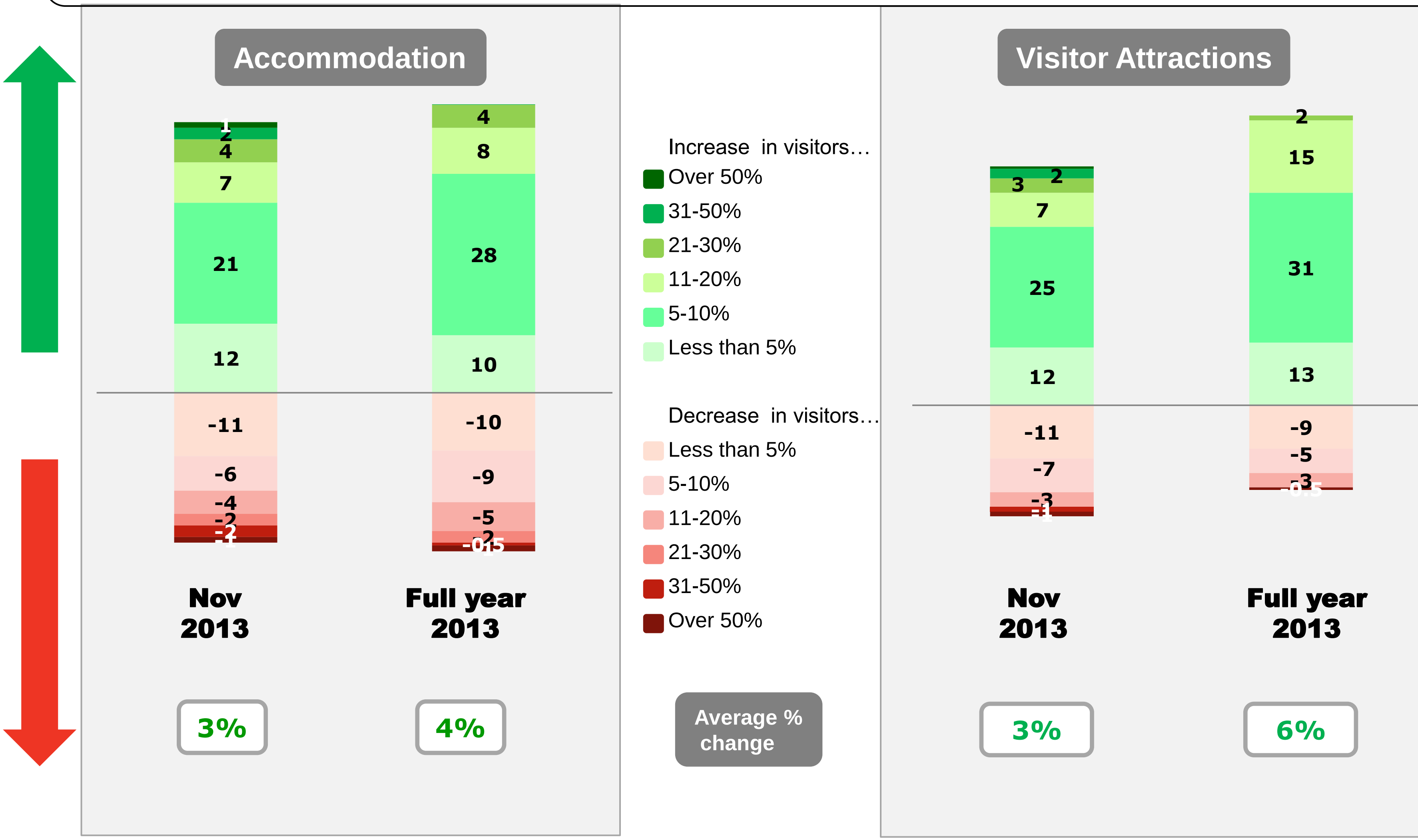
Although the number of businesses reporting increases in visitors for this latest period has dipped a little since Summer, numbers are still high and are an improvement on last November 2012.



PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
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**. Jan 2013:** Christmas and NY period 2012/ **Nov 2012:** Mid-Sept until end of October

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

The actual number of guests has risen by 3% for both accommodation businesses and visitor attractions during the mid-September to end of October period. Year to date performance across both sectors is good, likely buoyed by the strong Summer performance.



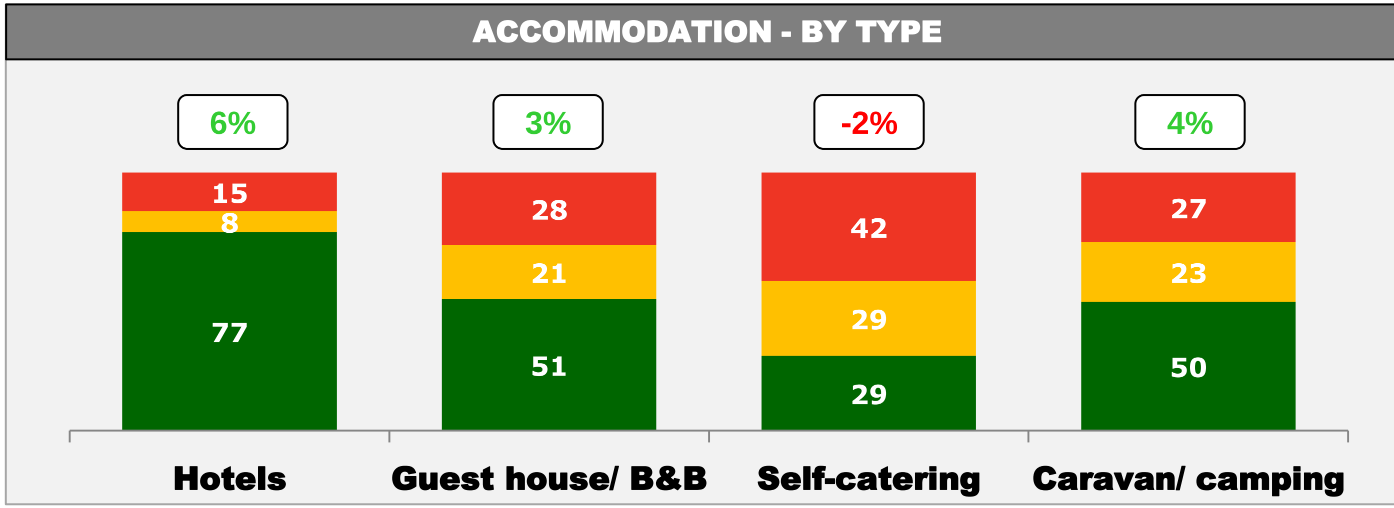
Changing business performance: By business type

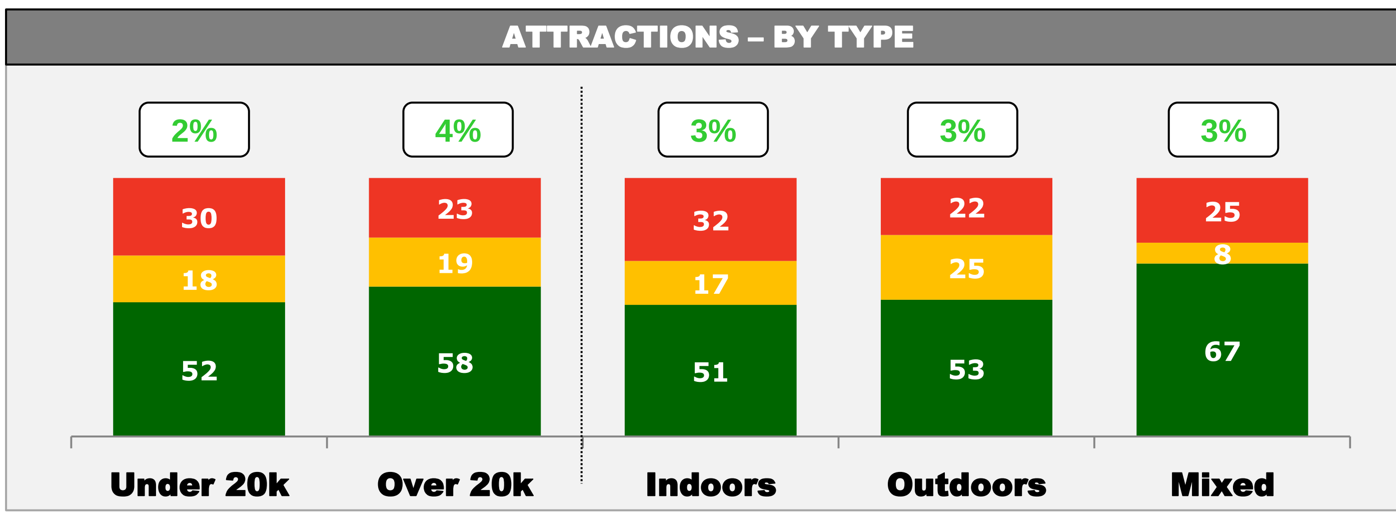
Self-catering accommodation types are the only ones to report a decrease in visitors compared with the same period last year. Hotels continue to be particularly resilient, whilst visitor attractions also fared well this period.

Versus same period previous year…

% of businesses:
- Down
- Same
- Up

% change in visitor numbers:

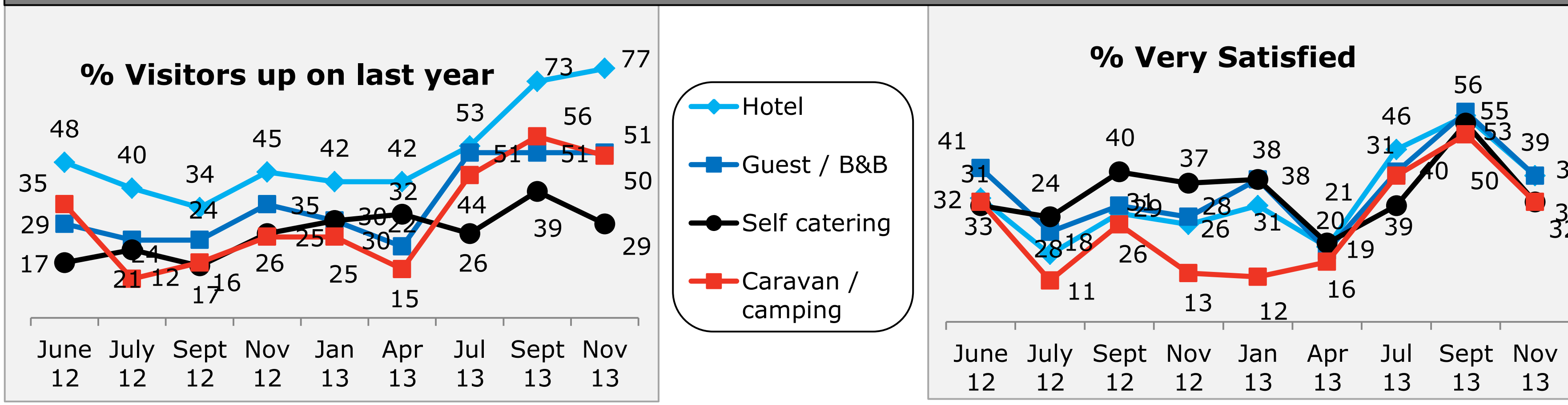




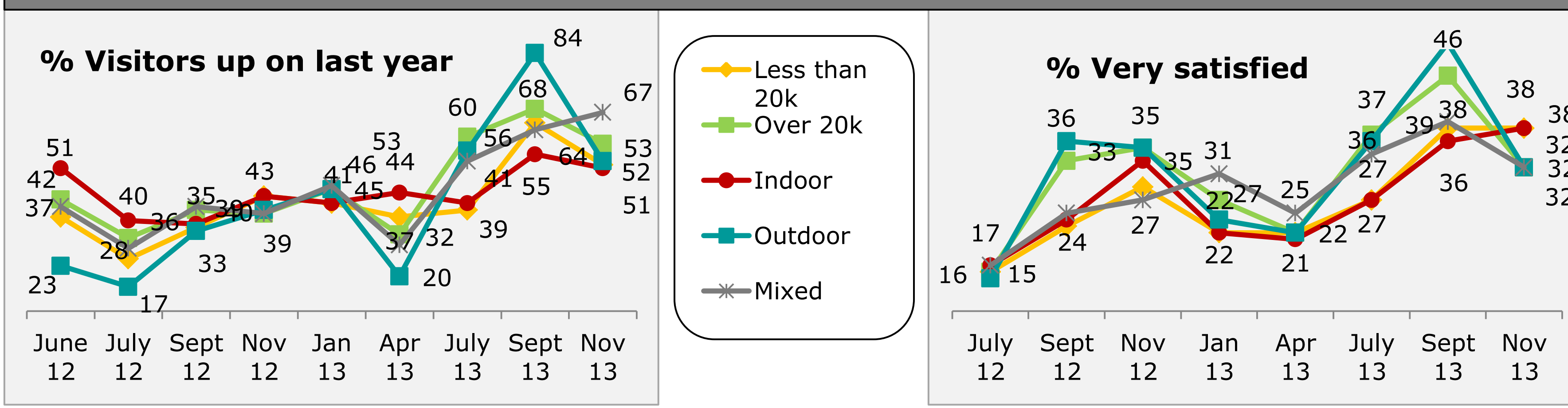
Changing business performance: By business type

There is a general plateauing of visitor numbers across business types, although Outdoor attractions have reported the greatest fall from Summer figures. Satisfaction drops to pre school holiday levels for both business types, where perhaps the successful Summer raised expectations, coupled with some concern over the coming Winter months.

ACCOMMODATION - BY TYPE



ATTRACTIONS – BY TYPE

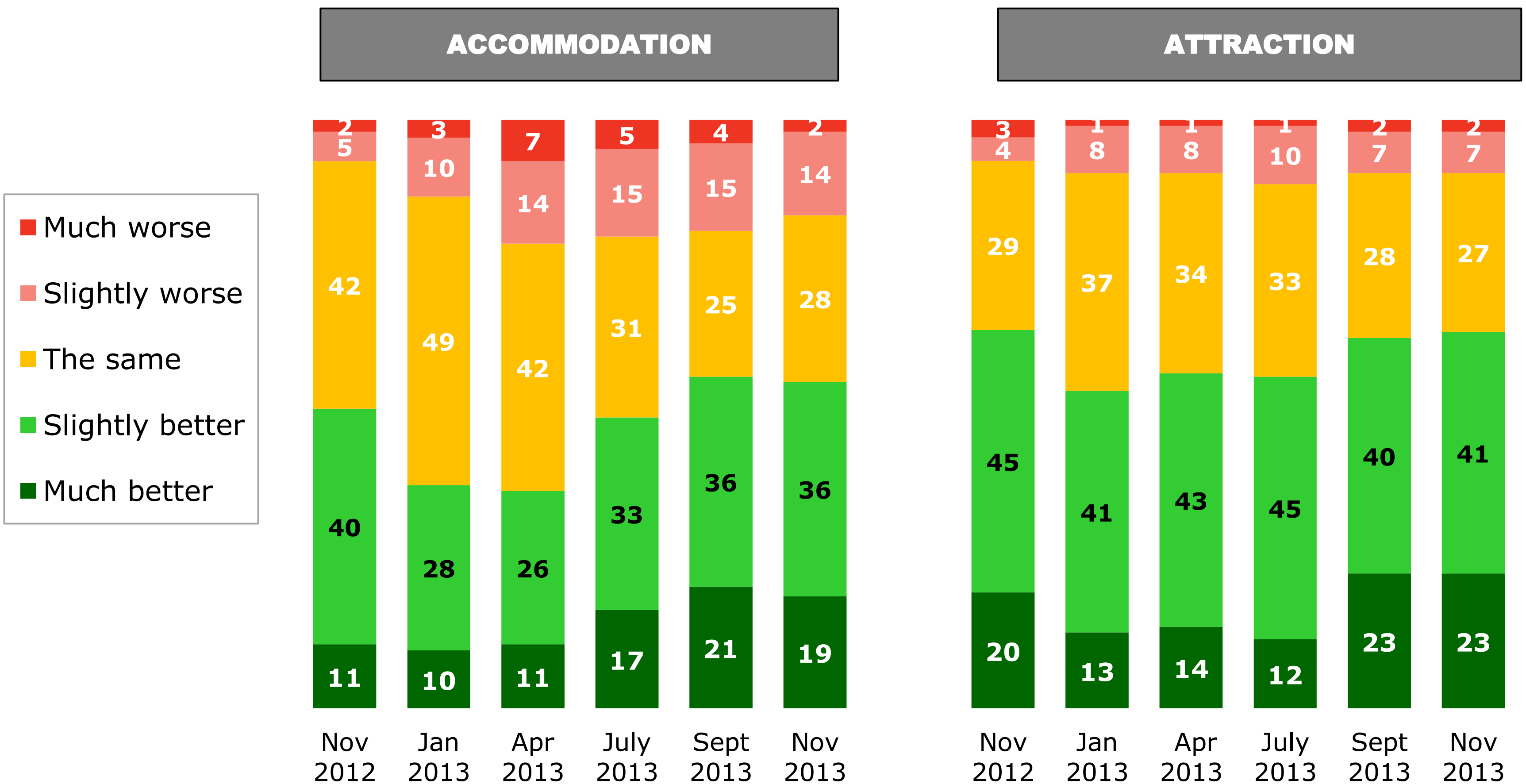


Q3/4, Q6

Business Confidence

Business optimism for 2013

Optimism for 2013 to be more successful than 2012 remains on a similarly high level to the Summer period for both business types, likely still buoyed by the increase in visitors over Summer



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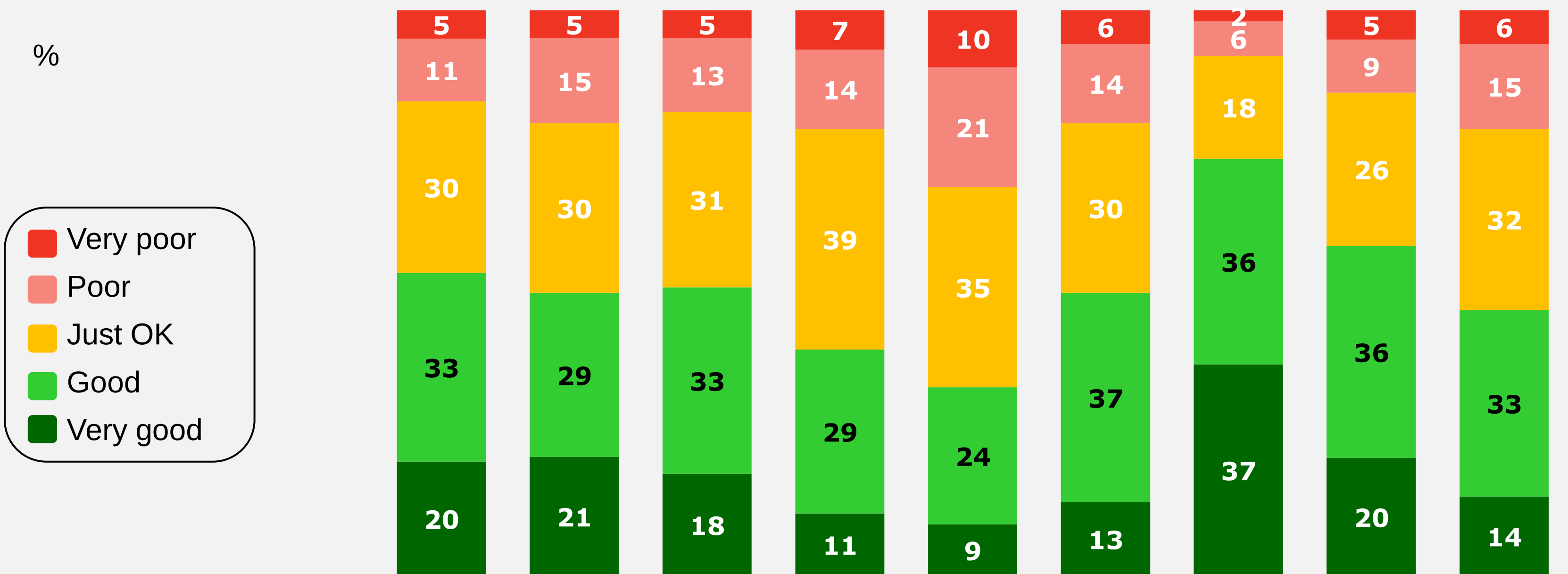
Q15

Advance booking levels: Accommodation

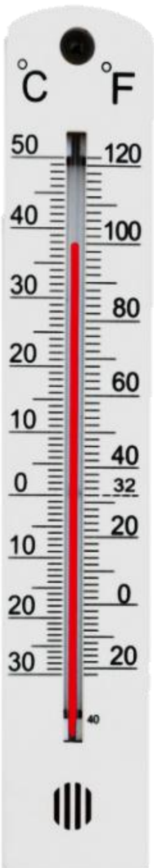
Satisfaction with advance bookings has dropped following the summer holidays, but remain similar to Spring this year and stronger than the same period last year (Nov 12).

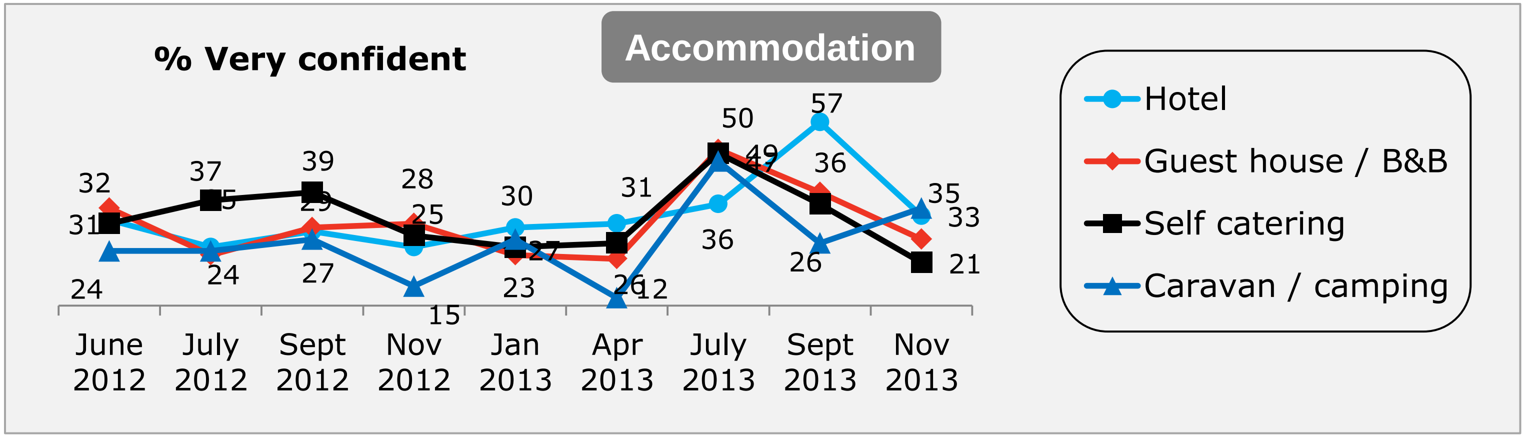


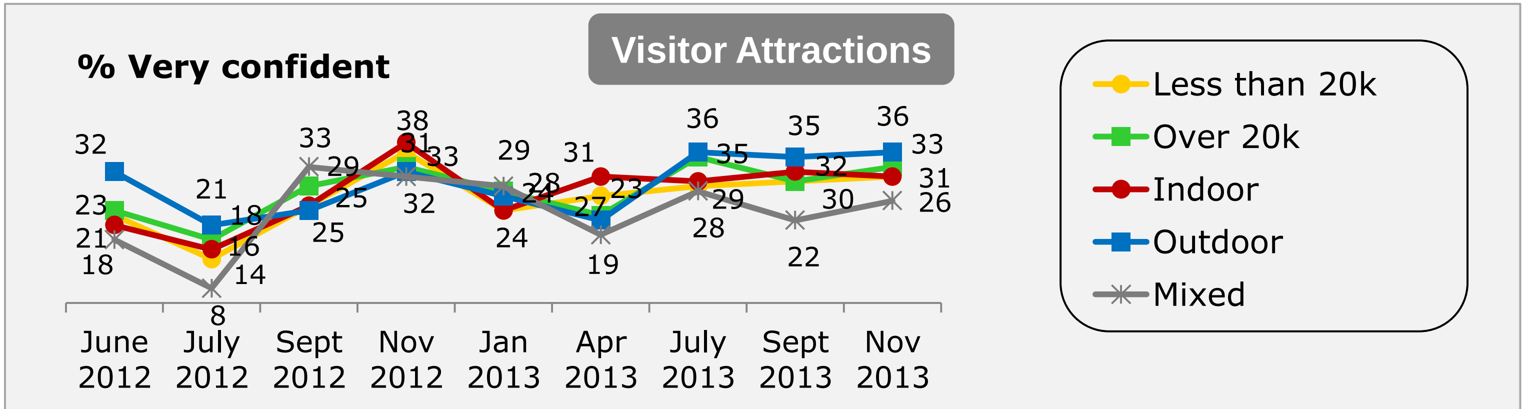
Survey conducted:	June 2012	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013
Period asked about:	Until start of summer hols	Until end of summer hols	Until end of October	Until end of the year	Until the end of Easter	Until late Spring/ early Summer	Until end of summer hols	Until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

Confidence in performance for forthcoming period: By business type

The outlook for attractions remains fairly stable, but accommodation businesses are reporting a more pronounced decrease in confidence for the final part of the year.







Survey conducted:	June 2012	July 2012	Sept 2012	Nov 2012	Jan 2013	Apr 2013	July 2013	Sept 2013	Nov 2013
Period asked about:	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 end of the Summer holidays	Until end of Oct	Until the end of the year

Positive verbatim comments on business confidence

Well we have recently done a publicity campaign and we are up for an award for Visit Lancashire so we should get some publicity from that. (Attraction)

Very confident as we currently have booking up until October next year from tour providers (Attraction)

We just opened a new exhibition today so we have a new product, and we have had some good national coverage for that which is helpful. In addition, the surrounding area with the campaigns which will help bring people into the city (Attraction)

I think its good because we're getting advanced bookings and more people for Christmas and New Year. Repeat business is an influence and the mild weather too.
(Accommodation)

It's looking good because of the bookings, repeat visitors and advertisements (Accommodation)

Negative verbatim comments on business confidence

“

People just aren't spending money....we're a high end business and people are not willing or they're more reluctant to spend on the higher end art
(Attraction)

We’re a seasonal business, so from now and until the end of the year we’re going to be quiet
(Attraction)

Not brilliant, economic downturn, no business around - shops are closing, not being refurbished.
(Accommodation)

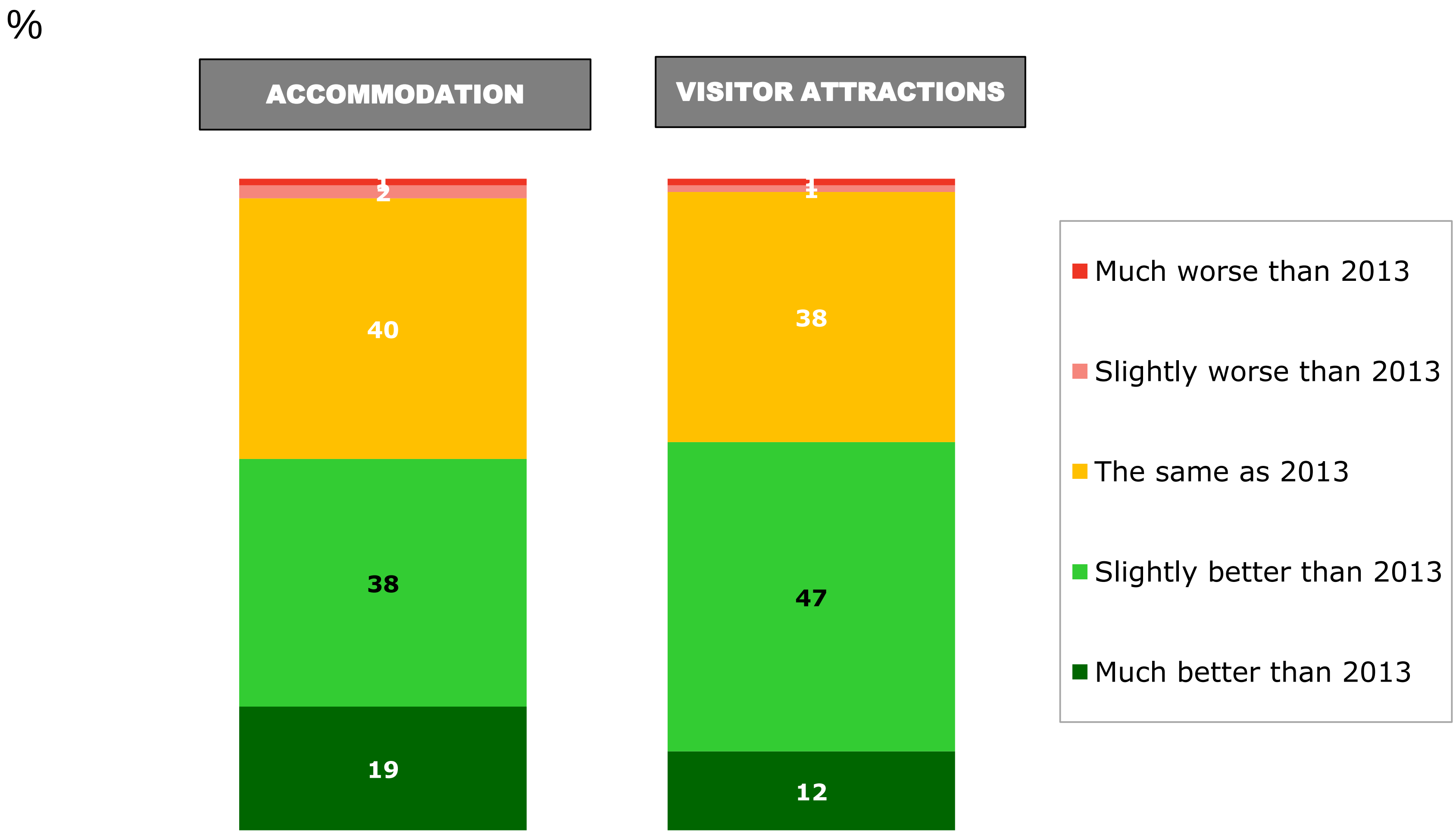
Scared - because the bookings have not been very good. All the over heads have gone up. Other things affecting my confidence in our business prospects are high VAT, weather and the place that we live in: it needs regeneration big time
(Accommodation)

Not very good, because of lack of trade round here generally
(Accommodation)

”

Looking to next year: business optimism for 2014

Improvements in visitor numbers in 2013 have boosted business optimism, and over half of businesses, amongst both accommodation and visitor attractions, anticipate 2014 to be a better year than 2013.



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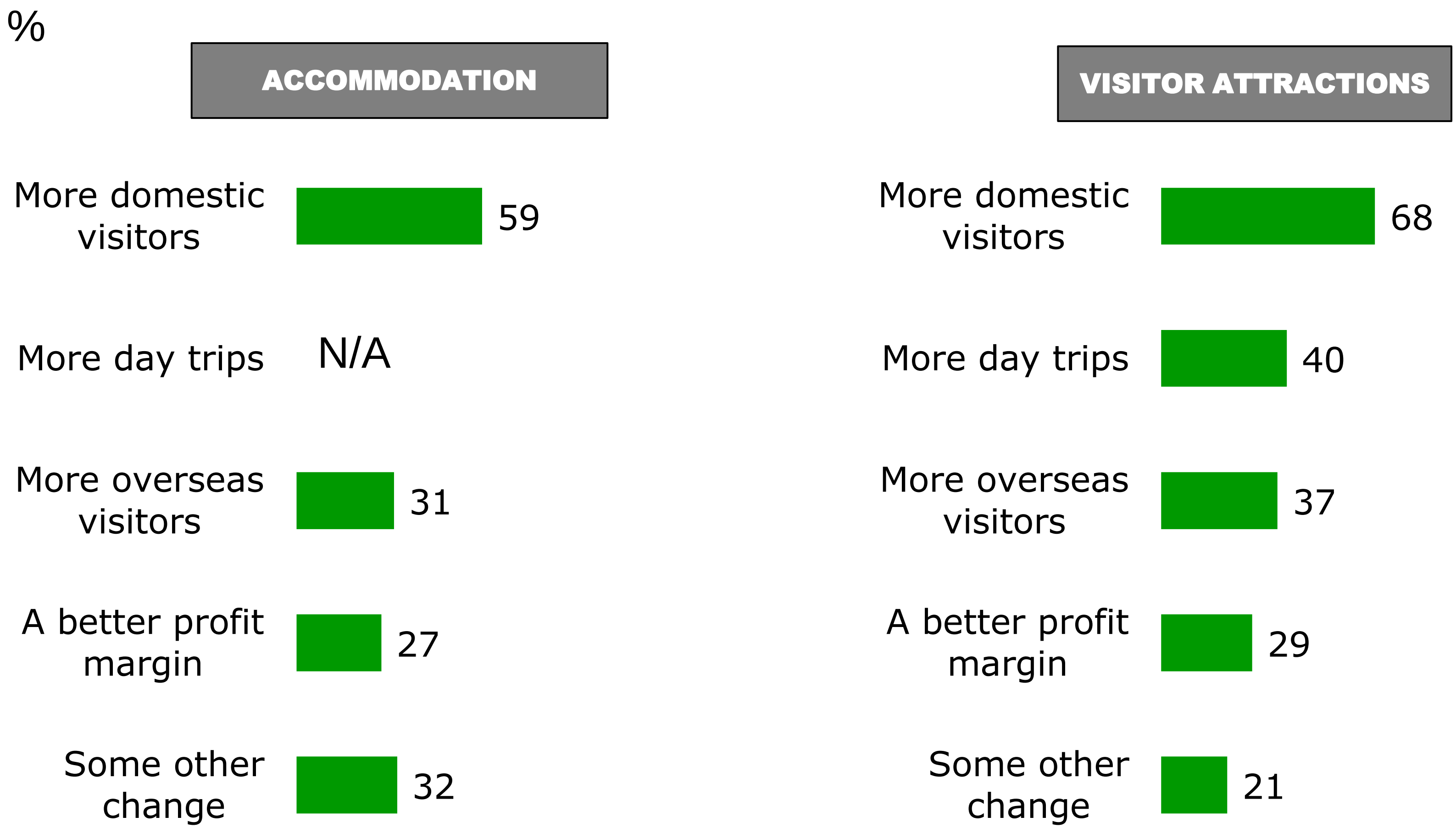
Reasons for positive business outlook for 2014

A better perceived 2014 relates to an increase in the domestic market.



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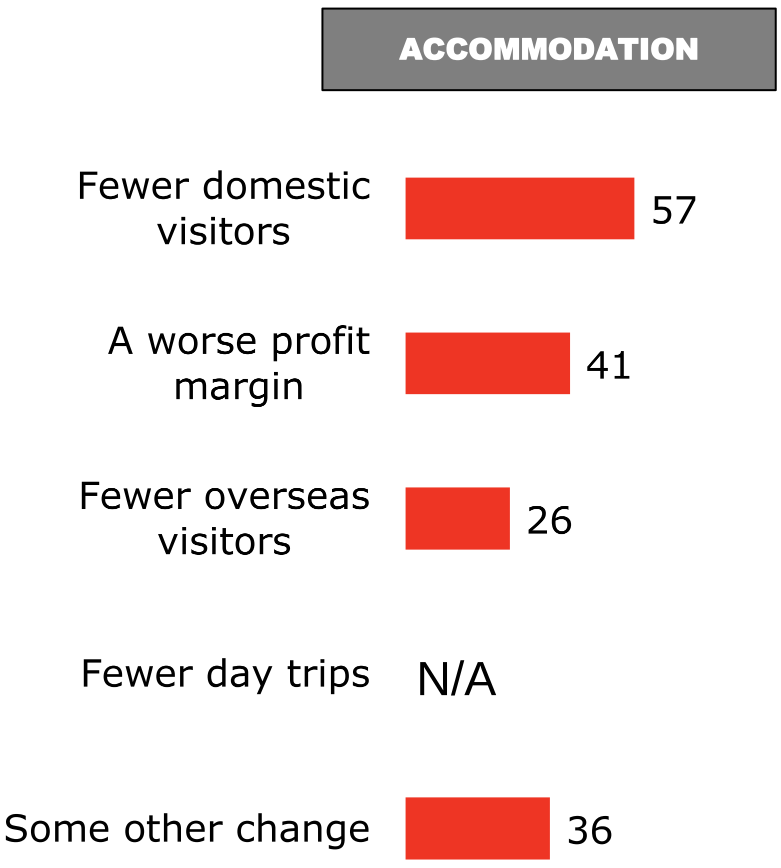
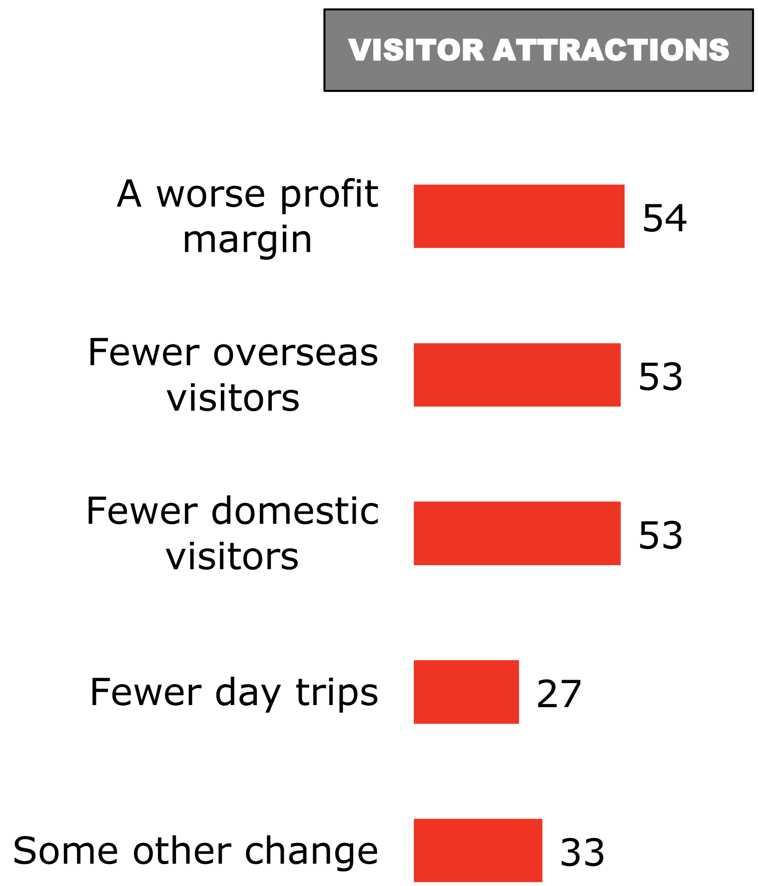
Q16b

Reasons for negative business outlook for 2014

Any negative feelings about business in 2014 relate primarily to domestic visitors for accommodation businesses, and poor profit margin for visitor attractions. There is also concern about fewer overseas visitors amongst both.

%





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Q16c

Reasons for positive / negative business outlook for 2014

Positive

Because I'm fully booked so I can put the prices up and increase our profit margin. (Accommodation)

The guests have indicated in 2013 that they will be returning for 2014 (Accommodation)

We're expanding over the Winter, so looking to attract more day visitors when we re-open in 2014 (Attraction)

Well we are trying to do more work with other tourist attractions which will help with more visitors (Attraction)

Negative

Expecting less people as I'm only getting repeat customers (Accommodation)

We have a new Premier Inn that has opened a few miles from our hotel so I expect that could possibly affect our occupancy next year (Accommodation)

Lack of funding so no money to invest in improvements and new offerings (Attraction)

Don't think profit margin will increase because energy bills have gone up (Attraction)


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