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Background
The Tourism Business Monitor is designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

The survey is conducted via telephone 4-5 times per year immediately following key tourism periods, with ‘hot topic’ questions inserted on a periodic basis.

The survey is conducted amongst:

**300* accommodation sites**, principally split into:
- Hotels
- Guest houses / B&Bs
- Self-catering
- Caravan / campsites

Accommodation sites are also split by region and number of bed spaces.

**250* visitor attractions**, principally split into:
- Indoor sites
- Outdoor sites
- Mixed sites

And
- Smaller sites (less than 20,000 visitors p.a.)
- Larger sites (more than 20,000 visitors p.a.)

Attractions are also split by region, free/paid admission and whether they are members of the VisitEngland Quality Scheme.

*Prior to July 2017, sample sizes were 500 for accommodation and 300 for visitor attractions.
**Recent fieldwork dates**

**January 2018:** 2-5 Jan, reviewing the Christmas and New Year period 2017  
**September 2017:** 4-8 Sep, reviewing the period from mid-July up until the end of the summer holidays  
**July 2017:** 12-17 Jul, reviewing the period after the Easter holidays up until mid-July  
**April 2017:** 24 Apr-2 May, reviewing the Easter period 2017  
**January 2017:** 3-11 Jan, reviewing the Christmas and New Year period 2016  
**July 2016:** 18-25 Jul, reviewing the period after the Easter holidays up until mid-July  
**April 2016:** 18-24 Apr, reviewing the Easter period 2016  
**January 2016:** 5-11 Jan, reviewing the Christmas and New Year period 2015  
**November 2015:** 2-8 Nov, reviewing the period from mid-September until the end of the October  
**September 2015:** 3-10 Sep, reviewing the period from end of May until the end of the school summer holidays  
**June 2015:** 1-5 Jun, reviewing the period from Easter up until the end of May  
**January 2015:** 5-9 Jan, reviewing the Christmas and New Year period 2014  
**November 2014:** 3-9 Nov, reviewing the period from mid-September until the end of the October  
**September 2014:** 8-14 Sep, reviewing the period from mid-July up until the end of the summer holidays
Key Findings
Key findings: Accommodation

In 2017, accommodation sites reported a net increase in visitors both domestic and overseas, with the growth from the latter group at its highest level for three years (39% of accommodation sites reporting more visitors – level with January 2015). This growth from the overseas market has been primarily driven by the strong performance of hotels, which saw the strongest net growth.

Across 2017 as a whole, 50% of accommodation sites reported an increase in visitor numbers vs. the year before. However, visitor growth in the Christmas and New Year period did not reach the same levels, with this figure falling to 4 in 10 (39%). This comparatively lower growth can be apportioned to the slower performance of self-catering and guesthouses/B&Bs over the festive period.

With 48% of sites reporting an increase, caravan/campsites overtook hotels to become the accommodation type with the highest levels of growth. However, this does not appear to have translated to satisfaction, with just over 4 in 10 (43%) of these sites purporting to be ‘very satisfied’ with their recent performance.

Looking ahead to the end of the Easter period, a third of accommodation sites judged their advance booking levels as ‘good’, with a further 18% describing levels as ‘very good’. These figures are on a par with the levels seen for corresponding periods in 2016 and 2017.

As business moves into the Spring months, hotels and caravan/campsites are predicting a successful period, with over half of both stating they are ‘very confident’ (55% and 51% respectively). This is despite caravan/campsites having the lowest advance booking levels of any accommodation type.

Looking back over 2017 overall, 12% of accommodation sites cited issues surrounding the exchange rate and Brexit as a factor in their business performance, with 8% also stating that it had affected their optimism for 2018. The impact of other external factors (such as the 2017 general election, and terrorism/safety fears) were adjudged to have had little effect.

At 28%, local DMO’s/local tourist boards were the most common type of organisation that accommodation sites were likely to have a relationship with. There are strong signs that this kind of association is valued, with 77% describing local DMO’s/local tourist boards as important to the performance of their business.

Looking at 2018 as a whole, many sites appear to be cautious - with half (51%) expecting their business performance to remain the same as 2017, a record-high. However, 44% of sites do still remain optimistic of an improved year ahead.
Key findings: Attractions

Across 2017 overall, visitor attractions experienced record levels of growth, with sites experiencing an high overall net growth from overseas visitors, primarily driven by visits to indoor sites. Just 6% and 7% of sites saw a drop in visitation from domestic and overseas visitors respectively.

This is echoed by the overall business performance of attractions in 2017, where 65% reported an increase in visitors vs. 2016. Comparatively, the festive period in isolation was not quite as successful with attractions reporting growth 14% lower at 51%. Indoor and mixed sites the only attraction types to maintain similar levels of performance.

This is reflected in satisfaction levels for the Christmas and New Year period, with 44% and 41% of indoor and mixed sites purporting to be ‘very satisfied’ with business performance, whilst levels for outdoor sites was lower.

Looking ahead until the end of Easter, confidence levels are fairly consistent (with just 6% separating all types of attraction). However, outdoor attractions emerged as the most bullish of a successful period, with 4 in 10 stating they were ‘very confident’ in the upcoming period.

Attractions seemed relatively untroubled by some of the most pertinent external factors in 2017, with just 3% highlighting issues surrounding the exchange rate and Brexit as having an impact on business performance. This view remains unchanged when looking ahead to 2018 as a whole, with 4% stating that the exchange rate/Brexit had impacted upon their business optimism.

6 in 10 (59%) visitor attractions reported having some form of contact or relationship with local DMO’s or local tourist boards – making it by far the most common type of business relationship. Of these, 85% viewed this relationship as important to the performance of their business.

Business optimism for 2018 as a whole is very similar to the figures seen at the start of 2017, with 57% of sites predicting that performance will outstrip the previous year, and almost 4 in 10 (38%) expecting it to remain consistent.
Case Studies
Case study: Accommodation
River Nene Cottages (Peterborough)

River Nene Cottages’ success can be apportioned to simple hard work, according to owner, Stephen Went, who believes that “people want decent, clean accommodation with a personal touch where they are made to feel welcome.”

River Nene Cottages pride themselves on offering first-class accommodation and value for money. “We’ve learnt to implement seasonal pricing” explains Stephen. This flexible business approach of bringing down prices at off-peak times of the year has helped ensure that visitors keep coming back time and time again.

The importance of a broad online presence is also emphasised, “we have an active website, feature on Booking.com and receive regular ratings through VisitEngland and Airbnb”, all of which Went feels have played their part in the site’s recent success.

River Nene Cottages’ success can also be attributed to geography - “we are in a great location - Peterborough is an expanding city and we are just off the A1, something that is particularly useful for business guests”. Went also believes that external factors such as Brexit have had a positive impact on business performance, as “with poorer exchange rates, people are not wanting to travel abroad”.

Looking ahead, all the signs are pointing towards a successful 2018 for River Nene Cottages, with the site taking more advance bookings than at the same point in 2017.
Case study: Attractions
Discover, Children’s Story Centre (London)

Discover’s current exhibition, ‘A World Inside a Book: Gruffalos, Dragons and Other Creatures’ has been a huge draw for visitors, explains Racheal Brasier, Director of Marketing and Events at Discover.

“This particular exhibition is based on the UK’s leading picture book artist, and here at Discover we are able to represent it in a unique way” says Brasier, who describes the interactive experience “as if you’re going into a picture book world”.

The Children’s Story Centre has recently experienced the benefits of working with publishers (which have helped with PR) and also recognises the importance of having an active presence on social media, with Instagram, Twitter and Facebook accounts all helping to interact with interested members of the public.

Recent development of the site has also helped bring in an increased number of visitors. “We underwent a major refurbishment in 2016” explains Brasier, “expanding the Story World and creating a new Storytelling space and café, whilst also refreshing our offer to families and young children”.

These changes, and the fact that the exhibition is scheduled to run until September, have given Discover the confidence to expect their overall business performance in 2018 to be “much better than 2017”.

- Urban location
- Paid
- Mainly indoor
Business Dashboards
Business performance dashboard: Accommodation (%)

VISITOR NUMBERS

Visitor numbers (%)

<table>
<thead>
<tr>
<th></th>
<th>Jan 18</th>
<th>2017</th>
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<tbody>
<tr>
<td>Down</td>
<td>23</td>
<td>18</td>
</tr>
<tr>
<td>Same</td>
<td>38</td>
<td>32</td>
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<tr>
<td>Up</td>
<td>39</td>
<td>50</td>
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Satisfaction (%)

<table>
<thead>
<tr>
<th>Satisfaction (%)</th>
<th>Jan 18</th>
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<tbody>
<tr>
<td>Very</td>
<td>44</td>
</tr>
<tr>
<td>Quite</td>
<td>49</td>
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<tr>
<td>Not very</td>
<td>7</td>
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Visitor numbers during the Christmas and New Year period, compared with the same period in 2016 (%)

<table>
<thead>
<tr>
<th></th>
<th>Hotels</th>
<th>Guest house / B&amp;B</th>
<th>Self catering</th>
<th>Caravan / camping</th>
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<tr>
<td>Down</td>
<td>46</td>
<td>30</td>
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<tr>
<td>Same</td>
<td>36</td>
<td>35</td>
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<td>40</td>
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<tr>
<td>Up</td>
<td>17</td>
<td>35</td>
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Satisfaction with Performance during period (%)

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<th>Hotels</th>
<th>Guest house / B&amp;B</th>
<th>Self catering</th>
<th>Caravan / camping</th>
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<tr>
<td>Very</td>
<td>31</td>
<td>44</td>
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<td>43</td>
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<td>Quite</td>
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<td>46</td>
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<tr>
<td>Not very</td>
<td>97</td>
<td>90</td>
<td>94</td>
<td>89</td>
</tr>
</tbody>
</table>

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The Christmas and New Year period
Business confidence dashboard: Accommodation (%)

January 2018

Per Period Asked About for Future Business Confidence

Q13 CAUTION: LOW BASE SIZES
**Business performance dashboard: Attractions (%)**

**VISITOR NUMBERS**

Visitor numbers (%)

Jan 18 | 2017
---|---
19 | 15
30 | 20
51 | 65

Versus same period previous year...
- Down
- Same
- Up

**SATISFACTION**

Satisfaction (%)

Jan 18
- 10
- 49
- 40

Satisfied with business performance...
- Not at all
- Not very
- Quite
- Very

**Visitor numbers during the Christmas and New Year period, compared with the same period in 2016 (%)**

- Under 20k
- Over 20k
- Indoors
- Outdoors
- Mixed

**Satisfaction with Performance during period (%)**

- Under 20k
- Over 20k
- Indoors
- Outdoors
- Mixed

**PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE**

January 18: The Christmas and New Year period
Business confidence dashboard: Attractions (%)

% Very confident | % Fairly confident

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September 2017

<table>
<thead>
<tr>
<th>Less than 20k</th>
<th>Over 20k</th>
<th>Indoor</th>
<th>Outdoor</th>
<th>Mixed</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>96</td>
<td>94</td>
<td>92</td>
<td>94</td>
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<td>52</td>
<td>60</td>
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<td>52</td>
<td>56</td>
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<tr>
<td>37</td>
<td>36</td>
<td>34</td>
<td>40</td>
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PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
January 18: Until the end of Easter

Q13 CAUTION: LOW BASE SIZES
Visitor Profile
Changing visitor profile (year-to-date vs. previous year):
Accommodation (%)
2017 saw a net increase from both domestic and overseas visitors, with the growth from the latter group at three year high (39% of accommodation sites reporting more visitors – level with January 2015).
Changing visitor profile (year-to-date vs. previous year):
Accommodation – by type (%)

This growth of overseas visitors has been primarily driven by the strong performance of hotels (+36), whilst guest houses/B&Bs have seen the highest amount of net growth from domestic visitors (+30).

DOMESTIC VISITORS

- Hotels: +30, 59, -12 (Net: +18)
- Guest Houses / B&Bs: +43, 44, -13 (Net: +30)
- Self-Catering: +38, 49, -13 (Net: +24)
- Caravan / Camping: +19, 75, -6 (Net: +14)

OVERSEAS VISITORS

- Hotels: +42, 51, -7 (Net: +36)
- Guest Houses / B&Bs: +45, 38, -17 (Net: +28)
- Self-Catering: +32, 52, -16 (Net: +15)
- Caravan / Camping: +37, 48, -14 (Net: +24)

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The whole of 2017

CAUTION: LOW BASE SIZES
Changing visitor profile (year-to-date vs. previous year): Attractions (%)

Attractions reported strong levels of growth for 2017 as a whole, with just 6% and 7% experiencing a drop in visitation from domestic and overseas visitors respectively. The net growth of +32 from overseas visitors is at a record-high.
Changing visitor profile (year-to-date vs. previous year):
Attractions – by type (%)
Larger attractions fared particularly well in 2017 (net increase of 45% from domestic visitors, 34% from overseas), with smaller, outdoor attractions tending to report lower levels of growth.

Domestic visitors
- Under 20k: Up 32, Same 63, Down 6
- Over 20k: Up 51, Same 43, Down 6
- Indoors: Up 41, Same 54, Down 5
- Outdoors: Up 40, Same 52, Down 8
- Mixed: Up 47, Same 50, Down 3

Overseas visitors
- Under 20k: Up 39, Same 53, Down 8
- Over 20k: Up 40, Same 55, Down 5
- Indoors: Up 45, Same 47, Down 8
- Outdoors: Up 33, Same 60, Down 6
- Mixed: Up 34, Same 63, Down 3

NET: Up - Down
- Domestic visitors: Up 26, Down 6
- Overseas visitors: Up 30, Down 3

Q12 CAUTION: LOW BASE SIZES

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The whole of 2017
Changing visitor profile (year-to-date vs. previous year): Attractions – charging vs. free (%)
Paid attractions outperformed free attractions in terms of visitor growth, particularly so when looking at domestic visitors.

**Domestic visitors**
- Paid: 48 Up, 47 Same, 5 Down (+44)
- Free: 33 Up, 60 Same, 7 Down (+26)

**Overseas visitors**
- Paid: 42 Up, 50 Same, 8 Down (+34)
- Free: 35 Up, 60 Same, 5 Down (+31)

Q12 PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The whole of 2017
Business Performance
Visitor numbers: Accommodation year-on-year changes (%)

Whilst 39% of accommodation sites reported an increase in visitors over the Christmas and New Year period vs. the previous year, this was outstripped by the performance across 2017 as a whole (50%).
Visitor numbers: Accommodation - by type (%)

This comparatively lower growth vs. 2017 as a whole was due to the slower performance of self-catering sites and (to a greater extent) guesthouses/B&Bs over the festive period.
Changing business performance: Accommodation year-on-year changes - by type (%)

Caravan/campsites overtook hotels as the accommodation type with the highest levels of visitor growth – with 48% reporting an increase. Despite this, less than half (43%) of caravan/campsites purported to be ‘very satisfied’ with their business performance over the festive period.

% Visitors up on last year

% Very satisfied

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The Christmas and New Year period
Changing business performance: Accommodation year-on-year changes - by bed spaces (%)

Whilst larger sites (over 100 bedspaces) reported the highest levels of growth over the Christmas and New Year period (52% having more visitors than in the same period in 2016), it was the smaller sites who were most satisfied with their business performance.

% Visitors up on last year

% Very satisfied

Period asked about for past business performance
January 18: The Christmas and New Year period
Positive verbatim comments on business performance:

Accommodation

"More online bookings, good ratings on TripAdvisor.

The currency and weakness of the pound has helped – we’ve had a lot of overseas visitors.

I think people are now looking to take a holiday in the UK instead of going abroad.

One positive was the value of the Pound compared to the Euro.

Joining Booking.com."
Negative verbatim comments on business performance: Accommodation

"The uncertainty surrounding Brexit has made people a lot more cautious.

Business rates have had a very bad influence.

We had a lot of rain which affected the business."
External influences affecting business performance: 
Accommodation
External influences had some impact on accommodation sites in 2017, with issues surrounding Brexit and the exchange rate affecting 12% of businesses.

- 12%: Exchange rate / Brexit
- 1%: The election
- 2%: Terrorism / safety / security
Visitor numbers: Attractions year-on-year changes (%)

Half (51%) of attractions reported an increase in visitors over the festive period. However, this was 14% lower than the 65% seen over 2017 as a whole.
**Visitor numbers: Attractions - by type (%)**

Whilst all types of attractions (with the exception of mixed sites) experienced comparatively lower rates of growth over the Christmas and New Year period, it is perhaps unsurprising that outdoor sites were particularly affected.
Changing business performance: Attractions year-on-year changes - by type (%)

Sites which offered protection against inclement weather were the strongest performers over the festive period, with indoor and mixed attractions leading the way both in terms of visitor number increases (57% and 54%) and being ‘very satisfied’ with their performance (44% and 41% respectively).

% Visitors up on last year

% Very satisfied

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
January 18: The Christmas and New Year period
Changing business performance: Attractions year-on-year changes - by admission charge and VisitEngland Quality Scheme (%)

Whilst sites which charged for entry reported higher levels of growth (55% had more visitors over the festive period vs. the year before), the percentage purporting to be ‘very satisfied’ with business performance was 6% lower than the figure for free attractions (37% - paid, 43% - free).

**VisitEngland Quality Scheme**

Percentage of sites that had more visitors over the festive period vs. the year before.

**Period asked about for past business performance:**
January 18: The Christmas and New Year period
Positive verbatim comments on business performance: Attractions

We got fantastic feedback from reviews on Tripadvisor.

We have held more accessible events.

The impact of social media has been very beneficial.

The drop of the value of the Pound.

We have put on more events than usual.

I think the revamp of our website has helped.
Negative verbatim comments on business performance: Attractions

"The weather was not good for us. Too much rain.

We now face more competition.

We can’t afford to do a lot of advertising."
External factors affecting business performance: Attractions

Visitor attractions were less affected by external factors than accommodation sites, with just 3% stating that issues around the exchange rate and Brexit had impacted them in 2017.

3% Exchange rate / Brexit
0% The election
<1% Terrorism / safety / security
Relationships with organisations: Accommodation

Accommodation sites were most likely to have relationships with ‘local DMO’s (Destination Marketing Organisations) or tourist boards’. A quarter (24%) have contact with or are members of VisitEngland.

Local DMO / local tourist board: 28
VisitEngland / VisitBritain: 24
Other trade associations: 14
Federation small business: 12
Local chamber of commerce: 8
Other trade associations: 7
LEP (local enterprise partnership): 5

NOTE: As this survey is commissioned by VE, the proportion of sites who participate with relationships to VE may over-index vs. the market as a whole.
Importance of relationships: Accommodation

The perceived importance of these relationships were varied, with ‘local DMO’s’, ‘other trade associations’ and ‘others’ considered to bear the most influence over business performance.

![Bar chart showing the importance of relationships for accommodation](chart.png)
Relationships with organisations: Attractions

Visitor attractions were more likely to have contact with (or be members of) trade organisations than accommodation sites. At 59%, relationships with ‘local DMO’s or tourist boards’ were by far the most common partnership,
Importance of relationships: Attractions

Visitor attractions viewed ‘other trade associations’ as the most important relationship, with 92% of those who had recently been in contact with this kind of organisation viewing the connection with some degree of importance.

### Chart Description

- **Local DMO / local tourist board**
  - Very important: 9%
  - Quite important: 6%
  - Neither important nor unimportant: 36%
  - Not very important: 49%
  - Not at all important: 6%

- **VisitEngland / VisitBritain**
  - Very important: 8%
  - Quite important: 11%
  - Neither important nor unimportant: 50%
  - Not very important: 31%
  - Not at all important: 9%

- **Other trade associations**
  - Very important: 8%
  - Quite important: 34%
  - Neither important nor unimportant: 58%
  - Not very important: 15%
  - Not at all important: 3%

- **Local chamber of commerce**
  - Very important: 7%
  - Quite important: 23%
  - Neither important nor unimportant: 13%
  - Not very important: 22%
  - Not at all important: 7%

- **LEP (local enterprise partnership)**
  - Very important: 3%
  - Quite important: 17%
  - Neither important nor unimportant: 58%
  - Not very important: 32%
  - Not at all important: 3%

- **Federation small business**
  - Very important: 7%
  - Quite important: 17%
  - Neither important nor unimportant: 32%
  - Not very important: 25%
  - Not at all important: 53%

- **Other**
  - Very important: 7%
  - Quite important: 36%
  - Neither important nor unimportant: 53%
  - Not very important: 5%
  - Not at all important: 5%
Business Confidence
Advance booking levels: Accommodation (%)

Looking ahead until the end of the Easter holidays, half (51%) of accommodation sites described their booking levels as at least ‘good’. This is similar to the levels seen for the corresponding periods in 2016, (52%), and 2017 (53%).
Confidence for forthcoming period: Accommodation (%)

Despite being the accommodation type least satisfied with advanced booking levels, 55% of caravan/campsites purported to be ‘very confident’ that the upcoming period would be a successful one.

CONFIDENCE

% Very confident

ADVANCED BOOKINGS

% Very good / good

PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE

January 18: Until the end of Easter
Business optimism for 2018 overall: Accommodation (%)

Looking at 2018 as a whole, 44% of accommodation sites predicted that the year would be more successful than 2017 - with just 5% expecting a worse performance. However, many sites were cautious about what the year might bring, with a record-high 51% of sites expecting no change.
Positive verbatim comments on business optimism for 2018: Accommodation

We expect high levels of retention and repeat business.

I think people are finding holidays abroad too expensive.

Online bookings are working very well for us.

We’re expecting more overseas visitors because of the royal wedding coming up.

I think people are reluctant to travel abroad now.
Negative verbatim comments on business optimism for 2018: Accommodation

"Brexit has taken its toll.

Because of competition with Airbnb."
External factors affecting business optimism for 2018:

Accommodation

Compared to 2017, accommodation sites expect the influence of key external influences to lessen in the year ahead. 8% predict that issues around the exchange rate and Brexit will affect performance (12% in 2017), whilst the impact of other factors is expected to be negligible.
Confidence for forthcoming period: Attractions (%)

Whilst confidence levels are fairly consistent across all attraction types, outdoor attractions emerge as most confident of a successful period up until the end of Easter.

CONFIDENCE
% Very confident

PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
January 18: Until the end of Easter
Business optimism for 2018 overall: Attractions (%)

Optimism for 2018 overall is consistent with figures reported in January 2017 – with 57% of attractions expecting business performance to be better than the year before.

PERIOD ASKED ABOUT FOR BUSINESS OPTIMISM
2018 overall

- Much better than 2017
- A little better than 2017
- The same as 2017
- A little worse than 2017
- A lot worse than 2017
We have a whole series of events taking place this year which will attract more visitors.

The exchange rate is bringing in more overseas visitors

Only launched last year so expecting growth through word of mouth and advertising.

Because of the feedback that we are getting via our website.

We have been given a grant from The HLF which will help us organise more activities.

We are going to be adding new items, but keeping the admission cost the same.
Because of a lack of funding.

We haven't got the staff resources.
External influences affecting business optimism for 2018: Attractions

A relatively small percentage of visitor attractions do expect the exchange rate and Brexit to continue to impact optimism in 2018 (4% - 3% reported this as an issue for business performance in 2017).
## Performance and confidence snapshot: January 2018
### Accommodation

<table>
<thead>
<tr>
<th>Visitor Numbers (the Christmas and New Year period)</th>
<th>Confidence (up until the end of Easter)</th>
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<tbody>
<tr>
<td>Up</td>
<td>Same</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>TOTAL (%)</td>
<td>39</td>
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<table>
<thead>
<tr>
<th>Type (%)</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Very</th>
<th>Very / fairly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>46</td>
<td>36</td>
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</tr>
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<td>Guest house / B&amp;B</td>
<td>30</td>
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<td>35</td>
<td>33</td>
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<td>Self catering</td>
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<td>32</td>
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<tr>
<td>Caravan / campsite</td>
<td>48</td>
<td>40</td>
<td>13</td>
<td>44</td>
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<table>
<thead>
<tr>
<th>Bedspaces (%)</th>
<th>Up to 10</th>
<th>11-100</th>
<th>Over 100</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Very</th>
<th>Very / fairly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 10</td>
<td>34</td>
<td>36</td>
<td>31</td>
<td>29</td>
<td>73</td>
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<td>11-100</td>
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<td>12</td>
<td>40</td>
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<td>Over 100</td>
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<table>
<thead>
<tr>
<th>Grading (%)</th>
<th>5 star</th>
<th>4 star</th>
<th>1-3 star</th>
<th>Budget / other</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Very</th>
<th>Very / fairly</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 star</td>
<td>46</td>
<td>24</td>
<td>29</td>
<td>24</td>
<td>29</td>
<td>73</td>
<td></td>
<td></td>
<td>75</td>
</tr>
<tr>
<td>4 star</td>
<td>42</td>
<td>41</td>
<td>17</td>
<td>41</td>
<td>40</td>
<td>80</td>
<td></td>
<td></td>
<td>85</td>
</tr>
<tr>
<td>1-3 star</td>
<td>50</td>
<td>29</td>
<td>21</td>
<td>43</td>
<td>40</td>
<td>80</td>
<td></td>
<td></td>
<td>77</td>
</tr>
<tr>
<td>Budget / other</td>
<td>31</td>
<td>44</td>
<td>25</td>
<td>37</td>
<td>37</td>
<td>77</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Location (%)</th>
<th>Seaside</th>
<th>Large town / city</th>
<th>Small town</th>
<th>Rural</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Very</th>
<th>Very / fairly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seaside</td>
<td>37</td>
<td>35</td>
<td>28</td>
<td>43</td>
<td>78</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Large town / city</td>
<td>41</td>
<td>38</td>
<td>21</td>
<td>37</td>
<td>75</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small town</td>
<td>39</td>
<td>48</td>
<td>13</td>
<td>32</td>
<td>86</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural</td>
<td>41</td>
<td>38</td>
<td>21</td>
<td>35</td>
<td>78</td>
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</table>
Performance and confidence snapshot: January 2018
Attractions

<table>
<thead>
<tr>
<th>Visitor Numbers (the Christmas and New Year period)</th>
<th>CONFIDENCE (up until the end of Easter)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>Same</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>TOTAL (%)</td>
<td>51</td>
</tr>
<tr>
<td>Less than 20k</td>
<td>47</td>
</tr>
<tr>
<td>20k or over</td>
<td>52</td>
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<tr>
<td>20k-50k</td>
<td>64</td>
</tr>
<tr>
<td>50k-100k</td>
<td>56</td>
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<tr>
<td>100k-200k</td>
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</tr>
<tr>
<td>Over 200k</td>
<td>40</td>
</tr>
<tr>
<td>Visitor numbers p.a. (%)</td>
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<tr>
<td>Indoor</td>
<td>57</td>
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<tr>
<td>Outdoor</td>
<td>44</td>
</tr>
<tr>
<td>Mixed</td>
<td>54</td>
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<tr>
<td>Charge(%)</td>
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<tr>
<td>Paid</td>
<td>55</td>
</tr>
<tr>
<td>Free</td>
<td>46</td>
</tr>
<tr>
<td>Quality Scheme (%)</td>
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<tr>
<td>Yes</td>
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</tr>
<tr>
<td>No</td>
<td>47</td>
</tr>
<tr>
<td>Location (%)</td>
<td></td>
</tr>
<tr>
<td>Seaside</td>
<td>29</td>
</tr>
<tr>
<td>Large town / city</td>
<td>51</td>
</tr>
<tr>
<td>Small town</td>
<td>77</td>
</tr>
<tr>
<td>Rural</td>
<td>43</td>
</tr>
</tbody>
</table>
### Periods asked about for past business performance

<table>
<thead>
<tr>
<th>Wave</th>
<th>Period asked about</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2014</td>
<td>After Easter holidays until mid-July</td>
</tr>
<tr>
<td>September 2014</td>
<td>Mid-July until end of the summer holidays</td>
</tr>
<tr>
<td>November 2014</td>
<td>Mid Sept until the end of October</td>
</tr>
<tr>
<td>January 2015</td>
<td>Christmas and New Year period</td>
</tr>
<tr>
<td>June 2015</td>
<td>Easter up until the end of May</td>
</tr>
<tr>
<td>September 2015</td>
<td>End of May until end of the summer holidays</td>
</tr>
<tr>
<td>November 2015</td>
<td>Mid Sept until the end of October</td>
</tr>
<tr>
<td>January 2016</td>
<td>Christmas and New Year period</td>
</tr>
<tr>
<td>April 2016</td>
<td>Easter period</td>
</tr>
<tr>
<td>July 2016</td>
<td>After Easter holidays until mid-July</td>
</tr>
<tr>
<td>January 2017</td>
<td>Christmas and New Year period</td>
</tr>
<tr>
<td>April 2017</td>
<td>Easter period</td>
</tr>
<tr>
<td>July 2017</td>
<td>After Easter holidays until mid-July</td>
</tr>
<tr>
<td>September 2017</td>
<td>Mid-July until end of the summer holidays</td>
</tr>
<tr>
<td>January 2018</td>
<td>Christmas and New Year period</td>
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</table>
## Periods asked about for future business confidence

<table>
<thead>
<tr>
<th>Wave</th>
<th>Period asked about</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2014</td>
<td>Until the end of the school summer holidays</td>
</tr>
<tr>
<td>September 2014</td>
<td>Until end of October</td>
</tr>
<tr>
<td>November 2014</td>
<td>Until end of the year</td>
</tr>
<tr>
<td>January 2015</td>
<td>Until end of Easter</td>
</tr>
<tr>
<td>June 2015</td>
<td>Until the end of the school summer holidays</td>
</tr>
<tr>
<td>September 2015</td>
<td>Until end of October</td>
</tr>
<tr>
<td>November 2015</td>
<td>Until end of the year</td>
</tr>
<tr>
<td>January 2016</td>
<td>Until end of Easter</td>
</tr>
<tr>
<td>April 2016</td>
<td>Until late Spring/ early Summer</td>
</tr>
<tr>
<td>July 2016</td>
<td>Until the end of the school summer holidays</td>
</tr>
<tr>
<td>January 2017</td>
<td>Until end of Easter</td>
</tr>
<tr>
<td>April 2017</td>
<td>Until late Spring/ early Summer</td>
</tr>
<tr>
<td>July 2017</td>
<td>Until the end of the school summer holidays</td>
</tr>
<tr>
<td>September 2017</td>
<td>Until end of October</td>
</tr>
<tr>
<td>January 2018</td>
<td>Until end of Easter</td>
</tr>
</tbody>
</table>
BDRC Continental comply with ISO 20252, the recognised international quality standards for market research, thus the project has been carried out in accordance with these standards.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BDRC Continental, they are briefed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252.

Full methodological details relevant to the project, are available upon request.