Tourism Business Monitor 2015

Accommodation Report

Wave 1 – Christmas and New Year period
Tourism Business Monitor designed to measure, monitor and understand tourism business performance and confidence and the factors which influence them.

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 2015**: 5-9 Jan 2015, reviewing the Christmas and New Year period 2014
**Nov 2014**: 3-9 Nov 2014, reviewing mid-September until the end of October
**Sept 2014**: 8-14 Sept 2014, reviewing the period from mid-July up until the end of the summer holidays
**July 2014**: 14-20 July 2014, reviewing the period after the Easter holidays up until mid-July
**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 July 2013, reviewing the period after the Easter holidays up until mid-July
**Apr 2013**: 15-21 April 2013, reviewing the period from January until the end of the Easter holidays
**Jan 2013**: 7-13 January 2013, reviewing the Christmas and New Year period 2012
## Accommodation sample targets (total 500)

<table>
<thead>
<tr>
<th>Region</th>
<th>Serviced Accommodation</th>
<th>Non-serviced Accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>100 Hotels</td>
<td>150 Guest Houses / B&amp;Bs</td>
</tr>
<tr>
<td>North (North East, North West, Yorkshire)</td>
<td>32</td>
<td>42</td>
</tr>
<tr>
<td>Midlands (East Midlands, East, Heart of England)</td>
<td>22</td>
<td>29</td>
</tr>
<tr>
<td>South (South East, South West)</td>
<td>36</td>
<td>70</td>
</tr>
<tr>
<td>London</td>
<td>10</td>
<td>9</td>
</tr>
</tbody>
</table>

- 25 hotels with over 100 bed spaces
- 60 guest houses / B&Bs with over 10 bed spaces
- 35 self-catering with over 10 bed spaces
- 40 caravan / campsites with over 100 bed spaces

This is the target sample for each wave, reflecting the profile of accommodation in England. There are minor variations wave on wave, which are corrected by weighting the profile if needed.

**Please note: Self-catering sample for Wave 1 2015 was reduced to 100 businesses.**
Overall, 2014 has been a good year for accommodation businesses, with growth in domestic, overseas and repeat visitors. Camp/caravan sites in particular report growth from domestic visitors, although this may be associated with a difficult year in 2013.

Year on year increases in visitor numbers slowed slightly over the Christmas period (down from 5% to 4%), but still contributed to an overall annual increase in guests of 6%.

The hotel sector continues to fare the best, with an uplift in visitor numbers of 9% in 2014. B&Bs sales improved to 7% across the whole year, although growth slowed over Christmas. Non-serviced accommodation reported more modest annual increases in guests.

Over a third (34%) of accommodation businesses closed over the Christmas and New Year period in 2014. Amongst those who stayed open, the Christmas and New Year period was less buoyant than the rest of the year, but there was an improvement in visitor numbers compared with 2013.

Advance booking levels have dipped since the summer, which is to be expected, but are slightly higher than at this same time last year.

Business confidence tends to be lower for all accommodation types at this time of the year, but most sectors (self-catering aside) remain relatively optimistic for the period up to Easter 2015, bolstered by healthy advance bookings.

Optimism continues into the rest of 2015 and businesses are planning increases in investment. The principal investment of accommodation businesses in 2015 will again be in facilities and fittings, with around half planning on investing more in this area. There is a trend emerging for more investment in staff, with 21% intending to increase spend on training vs. only 9% in 2013. Deals and discounts appear to be less of a focus this year.
Business Dashboard
Business Performance Dashboard: Accommodation

VISITOR NUMBERS

Visitor numbers for Christmas and New Year 2014 period compared with same period 2013 (%)

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Down</th>
<th>Same</th>
<th>Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>55</td>
<td>30</td>
<td>15</td>
</tr>
<tr>
<td>Guest house / B&amp;B</td>
<td>50</td>
<td>31</td>
<td>19</td>
</tr>
<tr>
<td>Self catering</td>
<td>39</td>
<td>32</td>
<td>29</td>
</tr>
<tr>
<td>Caravan / camping</td>
<td>68</td>
<td>13</td>
<td>19</td>
</tr>
</tbody>
</table>

Satisfaction with Performance during period (%)

Satisfied with business performance…

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Not at all</th>
<th>Not very</th>
<th>Quite</th>
<th>Very</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>55</td>
<td>43</td>
<td>98</td>
<td></td>
</tr>
<tr>
<td>Guest house / B&amp;B</td>
<td>47</td>
<td>41</td>
<td>88</td>
<td></td>
</tr>
<tr>
<td>Self catering</td>
<td>38</td>
<td>39</td>
<td>78</td>
<td></td>
</tr>
<tr>
<td>Caravan / camping</td>
<td>48</td>
<td>46</td>
<td>93</td>
<td></td>
</tr>
</tbody>
</table>

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

Jan 2015: Christmas and New Year period 2014

Q3/4, Q6, 7/8, 10. Asked of those who were open during the period.
**Business Confidence Dashboard: Accommodation**

**Very confident** | **Fairly confident**
---|---
81 | 63  
83 | 42  
79 | 47  
74 | 46  
82 | 50  
73 | 48  
70 | 44  
78 | 55  
89 | 43  
86 | 48  
81 | 52  
83 | 54  
90 | 52  
91 | 43  
92 | 42  
87 | 45  
86 | 54  

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>41</td>
<td>32</td>
<td>28</td>
<td>32</td>
<td>25</td>
<td>26</td>
<td>23</td>
<td>46</td>
<td>38</td>
<td>29</td>
<td>29</td>
<td>38</td>
<td>48</td>
<td>43</td>
<td>42</td>
<td>45</td>
</tr>
</tbody>
</table>

**Jan 2015**

**Hotels**

95

48

46

**Guest house / B&B**

87

52

35

**Self catering**

78

61

17

**Caravan / camping**

87

53

35

**PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE**

Jan 2015: Up until end of Easter
Visitor Profile
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

Domestic visitors

<table>
<thead>
<tr>
<th></th>
<th>Jan 13</th>
<th>Apr 13</th>
<th>Jul 13</th>
<th>Sept 13</th>
<th>Nov 13</th>
<th>Jan 14</th>
<th>Apr 14</th>
<th>Jul 14</th>
<th>Sept 14</th>
<th>Nov 14</th>
<th>Jan 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>27</td>
<td>15</td>
<td>23</td>
<td>18</td>
<td>17</td>
<td>13</td>
<td>19</td>
<td>19</td>
<td>12</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>Down</td>
<td>29</td>
<td>44</td>
<td>27</td>
<td>39</td>
<td>43</td>
<td>36</td>
<td>34</td>
<td>30</td>
<td>36</td>
<td>38</td>
<td>46</td>
</tr>
</tbody>
</table>

NET: Up - Down

Q12

Overseas visitors

<table>
<thead>
<tr>
<th></th>
<th>Jan 13</th>
<th>Apr 13</th>
<th>Jul 13</th>
<th>Sept 13</th>
<th>Nov 13</th>
<th>Jan 14</th>
<th>Apr 14</th>
<th>Jul 14</th>
<th>Sept 14</th>
<th>Nov 14</th>
<th>Jan 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>30</td>
<td>35</td>
<td>26</td>
<td>38</td>
<td>34</td>
<td>29</td>
<td>25</td>
<td>31</td>
<td>38</td>
<td>30</td>
<td>39</td>
</tr>
<tr>
<td>Down</td>
<td>22</td>
<td>15</td>
<td>22</td>
<td>16</td>
<td>24</td>
<td>23</td>
<td>20</td>
<td>19</td>
<td>14</td>
<td>18</td>
<td>8</td>
</tr>
</tbody>
</table>

NET: Up - Down

Repeat visitors

<table>
<thead>
<tr>
<th></th>
<th>Jan 13</th>
<th>Apr 13</th>
<th>Jul 13</th>
<th>Sept 13</th>
<th>Nov 13</th>
<th>Jan 14</th>
<th>Apr 14</th>
<th>Jul 14</th>
<th>Sept 14</th>
<th>Nov 14</th>
<th>Jan 15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>37</td>
<td>24</td>
<td>39</td>
<td>38</td>
<td>39</td>
<td>46</td>
<td>34</td>
<td>33</td>
<td>38</td>
<td>45</td>
<td>51</td>
</tr>
<tr>
<td>Down</td>
<td>10</td>
<td>23</td>
<td>10</td>
<td>9</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>4</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

NET: Up - Down

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2015: The whole of 2014
Changing Visitor Profile (vs. previous year): Accommodation type

Overall, 2014 has been a good year for accommodation businesses, with growth in domestic, overseas and repeat visitors. Camp/caravan sites in particular report year on year growth from domestic visitors, although this may be associated with a difficult year in 2013.

### Domestic visitors (2014)

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>NET: Up - Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>56</td>
<td>40</td>
<td>4</td>
<td>52</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>38</td>
<td>53</td>
<td>8</td>
<td>30</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>41</td>
<td>47</td>
<td>12</td>
<td>29</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>55</td>
<td>37</td>
<td>8</td>
<td>47</td>
</tr>
</tbody>
</table>

### Overseas visitors (2014)

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>NET: Up - Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>52</td>
<td>43</td>
<td>5</td>
<td>47</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>41</td>
<td>47</td>
<td>11</td>
<td>30</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>33</td>
<td>62</td>
<td>5</td>
<td>28</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>26</td>
<td>61</td>
<td>13</td>
<td>13</td>
</tr>
</tbody>
</table>

### Repeat visitors (2014)

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>NET: Up - Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>58</td>
<td>39</td>
<td>3</td>
<td>55</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>44</td>
<td>50</td>
<td>6</td>
<td>38</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>45</td>
<td>41</td>
<td>14</td>
<td>31</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>64</td>
<td>33</td>
<td>3</td>
<td>61</td>
</tr>
</tbody>
</table>
Past Performance
Visitor numbers: Year-on-year changes

The Christmas and New Year period was less buoyant than the rest of the year, but overall businesses still reported an improvement in visitor numbers compared with 2013.

Q3/4, Q7/8

PERIODS ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

Jan: Christmas and New Year period / Apr: Easter period / Jul: After Easter holidays up until mid-July / Sept: Mid-July up until the end of the summer holidays / Nov: Mid-September until the end of October
Visitor numbers: Year-on-year changes by accommodation type

Hotels have had the most successful year in 2014, with only 7% of hotels reporting a decline in visitor numbers.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Jan-15 2014</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>14</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>49</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>75</td>
</tr>
</tbody>
</table>

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Jan 2015: Christmas and New Year period
Changing business performance: By accommodation type & bed spaces

The campsite sector continues to strengthen, with two thirds reporting an improvement in visitor numbers for the Christmas and New Year period. Hotels remain satisfied with their performance, although fewer exceeded the previous year’s visitor numbers than in recent periods.

### ACCOMMODATION TYPE

<table>
<thead>
<tr>
<th>% Visitors up on last year</th>
<th>% Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hotels</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Guest house / B&amp;B</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Self catering</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Caravan / camping</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE

**Jan 2015:** Christmas and New Year period

### BED SPACES

<table>
<thead>
<tr>
<th>% Visitors up on last year</th>
<th>% Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Up to 10 bed spaces</strong></td>
<td></td>
</tr>
<tr>
<td><strong>11 – 100 Bed spaces</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Over 100 bed spaces</strong></td>
<td></td>
</tr>
</tbody>
</table>

**PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE**

**Jan 2015:** Christmas and New Year period
Visitor Numbers: Year-on-year changes (%)

Year on year increases in visitor numbers slowed slightly over the Christmas period (down from 5% to 4%), but still contributed to an overall annual increase in guests of 6%.

<table>
<thead>
<tr>
<th>Period</th>
<th>Jan 2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average % change in visitor numbers</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Visitor numbers are divided into categories based on percentage change:

- **Increase:**
  - Over 50%
  - 31-50%
  - 21-30%
  - 11-20%
  - 5-10%
  - Less than 5%

- **Decrease:**
  - Less than 5%
  - 5-10%
  - 11-20%
  - 21-30%
  - 31-50%
  - Over 50%

Period asked about for past business performance:

- **Jan 2015:** Christmas and New Year period
The hotel sector continues to fare the best, with an uplift in visitor numbers of 9% in 2014. B&Bs sales improved to 7% across the whole year, although growth slowed during the Christmas period. Non-serviced accommodation reported more modest annual increases in guests.
We are being more flexible in taking short bookings. Because we live on site we’re able to clean and prepare the holiday cottages quickly.

I think the reason we had a strong Christmas was due to better marketing, starting earlier.

People have confidence in their situation with more money in their pockets and more confidence to spend that money.

We have had lots of Christmas parties.

Probably Christmas shopping – we have more leisure visitors around this time.

It’s our great customer service. We try to make sure everything is as our guests need it.
People are being careful with their money – you can see they aren’t spending as much as they used to.

People don’t want to spend as much money around Christmas; The Euro against the pound is a bad exchange rate.

We never work over the Christmas period as it’s family time.

We shut for maintenance over Christmas, and our planning regulations say we have to shut.

We just felt that all the staff deserved the time off. We only opened on New Year’s Eve as that the day we make the most money.
Case Studies

CARRMOUNT ESTATE (North Yorkshire)

Guest numbers increased by 31-50% in 2014 compared with the previous year, with a particularly strong Christmas and New Year period.

4 star self catering accommodation
• 5 properties (21 bed spaces)

Carole Quanbrough, manager of Carrmount Estate accommodation told us “even in this age of technology people still prefer a personal touch, so I always try to put myself in the guests’ shoes. We aim to give a home from home experience, and I think that’s why we get so many repeat visitors”.

Carole achieves this personal touch by paying attention to the little things that can have a big impact. For example, personally meeting all guests with homemade cakes and a pre-boiled kettle, and calling guests a few days before their arrival to see if there’s anything they need – whether it be a cot or a Christmas tree!

Investment in marketing (for inclusion on Yorkshire Holiday Cottages website) has helped to boost the number of new guests in 2014, and has proved to be a good investment even once the site fees have been accounted for.
Future Performance
Advance booking levels: Accommodation

Advance booking levels have dipped since the summer, which is expected, but are slightly higher than at this same time last year.

<table>
<thead>
<tr>
<th>%</th>
<th>Very poor</th>
<th>Poor</th>
<th>Just OK</th>
<th>Good</th>
<th>Very good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 2013</td>
<td>10%</td>
<td>21%</td>
<td>35%</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>Apr 2013</td>
<td>6%</td>
<td>14%</td>
<td>30%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>July 2013</td>
<td>6%</td>
<td>18%</td>
<td>36%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>Sept 2013</td>
<td>5%</td>
<td>27%</td>
<td>38%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Nov 2013</td>
<td>6%</td>
<td>15%</td>
<td>32%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Jan 2014</td>
<td>6%</td>
<td>13%</td>
<td>35%</td>
<td>12%</td>
<td>24%</td>
</tr>
<tr>
<td>Apr 2014</td>
<td>3%</td>
<td>22%</td>
<td>45%</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>Jul 2014</td>
<td>6%</td>
<td>20%</td>
<td>39%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Sept 2014</td>
<td>5%</td>
<td>24%</td>
<td>39%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Nov 2014</td>
<td>3%</td>
<td>23%</td>
<td>28%</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>Jan 2015</td>
<td>4%</td>
<td>24%</td>
<td>33%</td>
<td>32%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Survey conducted:
- Jan 2013: Until the end of Easter
- Apr 2013: Until late Spring/early Summer
- July 2013: Until end of summer hols
- Sept 2013: Until end of October
- Nov 2013: Until the end of Easter
- Jan 2014: Until late Spring/early Summer
- Apr 2014: Until end of summer hols
- Jul 2014: Until end of October
- Sept 2014: Until the end of the year
- Nov 2014: Until the end of Easter
- Jan 2015: Until the end of Easter

Period asked about:
- Until the end of Easter
- Until late Spring/early Summer
- Until end of summer hols
- Until end of October
- Until the end of Easter
- Until late Spring/early Summer
- Until end of summer hols
- Until end of October
- Until the end of the year
- Until the end of Easter
Confidence for forthcoming period: By accommodation type

Confidence levels tend to be lower for all business types at this time of the year, but most sectors (self-catering aside) remain relatively optimistic. Advance bookings fairly healthy, with camp/caravan sites doing particularly well compared with the previous year.

CONFIDENCE: For period up until the end of Easter

% Very confident

ADVANCED BOOKINGS: From now until the end of Easter

% Very good / good
Confidence & bookings for forthcoming period: By accommodation size

Smaller businesses (with up to 10 bed spaces) have seen a drop in confidence from last period, associated with lower levels of advance bookings.

CONFIDENCE: For period up until the end of Easter

% Very confident

ADVANCED BOOKINGS: From now until the end of Easter

% Very good/ good
Confidence for forthcoming period: By location

Businesses tend to report fewer advanced bookings at this time of year, but report fairly healthy books moving into the new year. However, the confidence of small town accommodation businesses has declined.

CONFIDENCE: For period up until the end of Easter

% Very confident

ADVANCED BOOKINGS: From now until the end of Easter

% Very good / good
Positive verbatim comments on business confidence: Accommodation

“Reasonable because we have already got booking in hand - we usually have bookings for between January and February but we already some for Easter.

Quite positive for the next two to three months as bookings look strong and we've had good feedback from a recent advertising campaign.

Good because our business runs off repeat custom. We are number one on trip advisor for our area and we have a very good website. The repeat customers support recruitment of new customers because they leave Trip Advisor comments.

The fact that it has been a mild winter gives us better prospects and there are some local factors such as us being in Wembley - so we do well when Wembley has an event.”
Not very good. Business has just dropped and dropped as we cater for the lower end of the market. Before we used to cater for people who wanted to spend one to two weeks, but I think people want shorter breaks now.

The business prospect for country properties is poor during winter months because of the weather and that will influence my bookings over the next coming months until Easter.

There aren't many bookings in there at the moment and we're going through quite a quiet period - December to January is always quiet.
Business optimism has remained relatively unchanged from Sept ’14, although fewer businesses expect a decline in visitor numbers.
Positive verbatim comments on business optimism for 2015: Accommodation

"We’ve started using a new online booking system.

I think people are a little more relaxed about the state of the economy.

If the economy continues to improve as they say, more and more people will come out. With the General Election the government might spend a little more to increase the feel good factor.

We’re expecting more weddings this year than last.

We are a very well established business, so are always busy, so our numbers will stay the same, but we expect to be able to charge more this year.

We’ve had a lot of bookings come in already."
Planned business changes
Planned business changes in the coming year: Accommodation

The principal investment of accommodation businesses in 2015 will again be in facilities and fittings, with around half planning on investing more in this area. There is a trend emerging for more investment in staff, with 21% intending to increase spend on training vs. only 9% in 2013.
Planned business changes in the coming year: **Staff training**

Large, city based hotels are the most likely to increase investment in staff training. 1 in 5 caravan/camping sites are planning on increasing investment in staff training also.

- **Hotel**: 51 increase, 2 decrease
- **B&B**: 14 increase, 1 decrease
- **Self-catering**: 9 increase, 1 decrease
- **Caravan/camping**: 22 increase, 2 decrease

- **Seaside**: 21 increase, 2 decrease
- **Large town/city**: 46 increase, 2 decrease
- **Small town**: 20 increase, 2 decrease
- **Countryside/village**: 16 increase, 2 decrease

- **Up to 10 bed spaces**: 8 increase, 1 decrease
- **11-100 bed spaces**: 30 increase, 1 decrease
- **Over 100 bed spaces**: 35 increase, 2 decrease
Planned business changes in the coming year: Investment in facilities/fittings

Intention to increase investment in infrastructure across the board.

- Hotel: Increase by 56
- B&B: Decrease by 2
- Self-catering: Increase by 45
- Caravan/camping: Increase by 50
- Seaside: Increase by 51
- Large town/city: Decrease by 5
- Small town: Increase by 60
- Countryside/village: Increase by 42
- Up to 10 bed spaces: Increase by 38
- 11-100 bed spaces: Decrease by 2
- Over 100 bed spaces: Increase by 54
Planned business changes in the coming year: Marketing investment

Plans to invest in marketing in 2014 are apparent across the board, particularly amongst larger businesses and hotels.
Planned business changes in the coming year: Discounts and deals for your business

Almost a third of hotels are planning increases in deals/discounts in 2015, but this is less of a focus for the other accommodation sectors.
Performance and confidence snapshot: January 2015

<table>
<thead>
<tr>
<th>Visitor Numbers (Christmas &amp; New Year period 2014)</th>
<th>Confidence (End of Easter 2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>Same</td>
</tr>
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<td>---</td>
<td>---</td>
</tr>
<tr>
<td>TOTAL (%)</td>
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<td>Hotel</td>
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<tr>
<td>Guest / B&amp;B</td>
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<td>Self catering</td>
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