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1. Headline Findings

Q1 Performance
1.1 The English tourism industry has experienced a tough start to the year. One in five (21%) businesses have had more visitors in Q1 than last year, but nearly half (45%) have had fewer. One in three (34%) have had the same level. This is reflected across all sectors, with guesthouses / B&B’s having a particularly difficult quarter.

1.2 Nearly half (44%) report decreased profitability for Q1 compared to just one in five (21%) who report increased profitability. However these figures are line with the visitor figures and so the industry does at least appear to have maintained margins this quarter.

Easter
1.3 One in five (20%) businesses had increased bookings for the Easter holiday period compared to nearly one in three (31%) which had a decrease. However confidence going into the Easter period was reasonably high, with three in four (76%) operators feeling confident.

Visitor types
1.4 Repeat visitors are providing stability to many operators. Two in five (41%) report increased repeat visitor levels in 2010 compared to 2009 and only a minority (9%) report a decreased level.

1.5 The domestic leisure market is looking stable on balance this year, but overseas levels are slightly down and business tourism has not yet picked up from the recession.

Advance bookings
1.6 The hotel, self catering and caravan & camping sectors all have slightly increased booking levels for the remainder of spring and summer compared to the norm for this time of year, but the guesthouse / B&B sector, where half (50%) report decreased bookings, looks to be in for a tough year.
Staycationers

1.7 Opinion is divided on whether the ‘staycation’ trend experienced by the industry last year will continue this year. One in five (21%) believe that more people will take holidays in Britain this year but a fairly similar proportion (18%) believe that fewer people will do so.

Expenditure

1.8 In spite of a difficult quarter, businesses are mostly planning to keep their expenditure the same as last year or increase it, especially on property or maintenance and marketing.

Price discounting and special offers

1.9 Hotel operators were quite ruthless with price cutting last year, and this year the practice looks set to continue to at least the same extent. Most (83%) hotels intend to undertake price discounting or special offers this year. This is an important reason to why many small serviced operators are struggling - they cannot compete with the prices being offered by budget chains.
2. Research Background

Objectives

2.1 This survey is the second of four or five ‘waves’ in the 2010 ‘Business Confidence Monitor’, which aims to measure business performance and confidence in the English tourism industry over the main holiday periods. This wave reports on Q1, Easter, and projections to summer 2010.

2.2 The main objectives of this second wave are to measure:

- Business performance during Q1
- Bookings and confidence for the Easter holiday period
- Trends by visitor type
- Bookings and confidence for the remainder of spring/summer
- Trends in expenditure
- Trends in price discounting and special offers

Methodology

2.3 Strategic Marketing and VisitEngland worked together to design a questionnaire for telephone interviewing. A copy of the marked-up questionnaire is included as an appendix.

2.4 A total of 502 interviews have been completed by telephone with business owners or managers between 29th and 31st March. Calls have been introduced on behalf of VisitEngland and have been conducted during daytime and evening hours.

Sampling

2.5 VisitEngland provided Strategic Marketing with a database of all graded accommodation businesses in England. We devised the sample quotas on the following page in order that the sample is representative of the industry by sector and region. The overall size of each sector quota has been set in accordance with the relative number and size of businesses which that sector
contributes to the industry. The size of each regional quota has been set using VisitBritain's 2007 Census of Accommodation Stock.

2.6 London hotels are the exception. The graded accommodation database is lacking in London hotels and so the quota is the most realistic number of telephone interviews achievable from a very limited data set within a given timeframe. Weighting the results of this cell is not possible with only four interviews.

2.7 Some multiple business contacts on the database share the same contact person and telephone number as they are part of the same chain or agency. We have set separate quotas for these ‘chains’ which lie outside of regional categorisation.

**Sample breakdown by region and sector**

<table>
<thead>
<tr>
<th>Region / Sector</th>
<th>Guest house / B&amp;B</th>
<th>Hotels</th>
<th>Self catering</th>
<th>Caravan &amp; campsites</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>North East</td>
<td>7</td>
<td>7</td>
<td>3</td>
<td>9</td>
<td>26</td>
</tr>
<tr>
<td>North West</td>
<td>25</td>
<td>22</td>
<td>14</td>
<td>16</td>
<td>77</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>13</td>
<td>11</td>
<td>19</td>
<td>19</td>
<td>62</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7</td>
<td>10</td>
<td>6</td>
<td>16</td>
<td>39</td>
</tr>
<tr>
<td>West Midlands</td>
<td>14</td>
<td>5</td>
<td>4</td>
<td>5</td>
<td>28</td>
</tr>
<tr>
<td>East of England</td>
<td>10</td>
<td>9</td>
<td>11</td>
<td>23</td>
<td>53</td>
</tr>
<tr>
<td>London</td>
<td>27</td>
<td>4</td>
<td>2</td>
<td>-</td>
<td>33</td>
</tr>
<tr>
<td>South East</td>
<td>24</td>
<td>12</td>
<td>24</td>
<td>11</td>
<td>71</td>
</tr>
<tr>
<td>South West</td>
<td>24</td>
<td>19</td>
<td>30</td>
<td>25</td>
<td>98</td>
</tr>
<tr>
<td>Chains</td>
<td>-</td>
<td>2</td>
<td>12</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>151</strong></td>
<td><strong>101</strong></td>
<td><strong>125</strong></td>
<td><strong>125</strong></td>
<td><strong>502</strong></td>
</tr>
</tbody>
</table>

2.8 In addition to sampling by region within each sector, we have also sampled by business size, defined by bedspaces, because if left to chance, the overall sample would be biased towards smaller businesses. These quotas are shown on the following page.
2.9 Within each sector we have viewed the available bedspace data and split the contacts into ‘large’ and ‘small’ businesses. The definition of ‘large’ is different for each sector, and is detailed in the table below.

### Sample breakdown by size and sector

<table>
<thead>
<tr>
<th>Size / Sector</th>
<th>Guest house / B&amp;B</th>
<th>Hotels</th>
<th>Self catering</th>
<th>Caravan &amp; campsites</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large</td>
<td>67</td>
<td>26</td>
<td>25</td>
<td>57</td>
<td>175</td>
</tr>
<tr>
<td>Small</td>
<td>84</td>
<td>75</td>
<td>100</td>
<td>68</td>
<td>327</td>
</tr>
<tr>
<td>Total</td>
<td>151</td>
<td>101</td>
<td>125</td>
<td>125</td>
<td>502</td>
</tr>
</tbody>
</table>

**Definition of ‘large’**

- More than 10 bedspaces
- More than 100 bedspaces

### Statistical validity

2.10 Throughout the results sections of this report, differences by sector, size or location (Seaside / Large town/city / Small town / Countryside/village) are reported if they statistically valid at the 95% confidence level. Differences by region are not reported because the individual sample sizes are not large enough to make robust comparisons.

2.11 More details on statistical validity are available on request.
3. Q1 Performance

3.1 Questions about Q1 performance have been asked to businesses which were open for the period – 411 businesses. Those answering ‘don’t know’ or refusing to give an answer (especially about profitability) have been excluded and the figures have been re-based accordingly.

Q1 has been a tough quarter

(Q2) "Compared to the first quarter last year, how many guests/visitors have you had during quarter 1 this year?"

<table>
<thead>
<tr>
<th>Sector</th>
<th>More</th>
<th>Same</th>
<th>Fewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>25%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>Self catering</td>
<td>24%</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Caravan &amp; camping</td>
<td>20%</td>
<td>44%</td>
<td>36%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B</td>
<td>17%</td>
<td>20%</td>
<td>63%</td>
</tr>
<tr>
<td>Overall</td>
<td>21%</td>
<td>34%</td>
<td>45%</td>
</tr>
</tbody>
</table>

3.2 The English tourism industry has experienced a tough start to the year. One in five (21%) businesses have had more visitors in Q1 than last year, but nearly half (45%) have had fewer. All sectors have been down, and guesthouses / B&B’s have had a particularly difficult quarter.

“March has been dreadful. We’re 40% down on last year for this month, and 25% down during February”
B&B, South West

“50% down on the first quarter”
Caravan park, West Midlands

“It has been horrible this year, we have no bookings at all”
B&B, North East
Profit margins have been maintained

(Q3) "Compared to the first quarter last year, what was your level of profitability during quarter 1 this year?"

<table>
<thead>
<tr>
<th></th>
<th>Higher than last year</th>
<th>Same as last year</th>
<th>Lower than last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self catering</td>
<td>28%</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>Hotel</td>
<td>25%</td>
<td>43%</td>
<td>32%</td>
</tr>
<tr>
<td>Caravan &amp; camping</td>
<td>21%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B</td>
<td>12%</td>
<td>24%</td>
<td>64%</td>
</tr>
<tr>
<td>Overall</td>
<td>21%</td>
<td>35%</td>
<td>44%</td>
</tr>
</tbody>
</table>

1/4/10

3.3 Profitability is down overall but the figures are in line with visitor numbers for the same period and so the industry does at least appear to have maintained margins.

3.4 8% of operators did not give an answer to this question.
4. Bookings and Confidence for Easter

4.1 The fieldwork was conducted before the Easter weekend and so questions about Easter have focused on bookings and confidence at the time of interviewing.

Easter bookings

(Q4) "Thinking now about the Easter holiday period, how are your booking levels compared to last Easter?"

<table>
<thead>
<tr>
<th>Sector</th>
<th>More</th>
<th>Same</th>
<th>Fewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self catering</td>
<td>28%</td>
<td>49%</td>
<td>23%</td>
</tr>
<tr>
<td>Hotel</td>
<td>23%</td>
<td>49%</td>
<td>28%</td>
</tr>
<tr>
<td>Caravan &amp; camping</td>
<td>21%</td>
<td>62%</td>
<td>17%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B</td>
<td>10%</td>
<td>39%</td>
<td>51%</td>
</tr>
<tr>
<td>Overall</td>
<td>20%</td>
<td>49%</td>
<td>31%</td>
</tr>
</tbody>
</table>

4.2 Going into the Easter holiday period, bookings levels were similar to last Easter for the hotel, self catering and caravan & camping sectors.

"Fully booked for Easter. Enquiries have been flooding in"
Self catering, South West

"Easter is busy – bookings were made early"
Self catering, South East

"We're fully booked for Easter, we took our last bookings in January"
Caravan park, North West
Guesthouse / B&B sector struggling

4.3 However Easter was not looking at all optimistic for the guesthouse / B&B sector.

"Easter weekend levels are the same; the weeks on either side are much lower"
B&B, North West

"We used to be busy but we aren’t anymore"
B&B, South East

“I just don’t know, it’s hard to tell as this year is so different to the last few years. I used to be able to predict how business will be but not anymore”
B&B, South West

“Business is awful at the moment. I don’t have any bookings until the end of April / beginning of May”
Guesthouse, London

“I don’t know what’s gone wrong. I’m four star. I’ve got no bookings - I’ve had one booking since last September”
B&B, London

High confidence for Easter

4.4 Confidence was fairly high for the Easter holiday period, even in the guesthouse / B&B sector, where one in five (20%) were feeling ‘very confident’ and nearly half (46%) were ‘fairly confident’.

(Q5) "How confident are you feeling about the Easter holiday period?"

- Very confident: 34%
- Fairly confident: 42%
- Not very confident: 19%
- Not at all confident: 5%

Base: 487
“Easter is looking good for us this year”
Hotel, South West

Weather was threatening to ruin Easter for caravan & camping sector

4.5 At the time of interviewing Easter was looking reasonably good for the caravan & camping sector, but actual results may have turned out very differently because a number of operators didn’t know if they would have to cancel bookings – or if customers would cancel on them - due to heavy rain.

“The weather forecast is terrible so we’re hoping that it won’t put people off”
Caravan park, North West

“Our caravans always fill but it’s the camping that suffers because of the weather”
Caravan park, Yorkshire

“We had to cancel everyone for Easter because of the weather”
Caravan park, South East
5. Trends in Visitor Types

(Q7) "Looking now at certain types of visitor, how are your levels of ... visitors looking in 2010 compared to 2009?"

<table>
<thead>
<tr>
<th>Type</th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>15%</td>
<td>67%</td>
<td>18%</td>
</tr>
<tr>
<td>Overseas</td>
<td>16%</td>
<td>57%</td>
<td>27%</td>
</tr>
<tr>
<td>Business</td>
<td>16%</td>
<td>59%</td>
<td>25%</td>
</tr>
<tr>
<td>Leisure</td>
<td>21%</td>
<td>59%</td>
<td>20%</td>
</tr>
<tr>
<td>Repeat</td>
<td>41%</td>
<td>50%</td>
<td>9%</td>
</tr>
</tbody>
</table>

5.1 The domestic leisure market is looking stable on balance this year, but overseas levels are slightly down and business tourism has not yet picked up from the recession.

“There’s been a year on year steady decline in our overseas customers”
Guesthouse, London

“There used to have contactors stay but that has decreased”
B&B, London

Repeat visitors are providing stability

5.2 Repeat visitors are bringing stability to many operators who could otherwise be in for an unpredictable year.

“Fewer enquiries this year – most bookings are repeats”
Self catering, South West
“All booked up 43 weeks thanks to regulars”
Self catering, Yorkshire

“Bookings are very low. Only bookings are from repeat customers”
Self catering, South West

“We have a lot of repeat visitors. Many are coming back to us”
Caravan park, East of England
6. Outlook for Remainder of Spring and Summer

(Q8) "Compared to the norm for this time of year, how are your booking levels looking for the remainder of spring and the summer?"

<table>
<thead>
<tr>
<th></th>
<th>Better than normal</th>
<th>Same as normal</th>
<th>Not as good as normal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self catering</td>
<td>34%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Hotel</td>
<td>29%</td>
<td>51%</td>
<td>20%</td>
</tr>
<tr>
<td>Caravan &amp; camping</td>
<td>28%</td>
<td>56%</td>
<td>16%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B</td>
<td>20%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Overall</td>
<td>27%</td>
<td>43%</td>
<td>30%</td>
</tr>
</tbody>
</table>

6.1 The hotel, self catering and caravan & camping sectors all have slightly increased booking levels for the remainder of spring and summer compared to the norm for this time of year.

6.2 Booking levels are higher in seaside locations, where over one third (35%) have increased bookings, than in large towns, where just one in five (20%) have increased bookings.

"Fully booked from Easter till second week in September. Had lots of enquiries"

Self catering, South West
Guesthouse / B&B sector in trouble

6.3 The guesthouse / B&B sector, where half (50%) report decreased bookings, looks to be in for a tough year. This appears to be across the country.

“The enquiries are not there. It’s not about failing to turn enquiries into bookings, the levels of enquiries are a lot lower”
B&B, North West

“Business has ground to a halt. I've got no bookings for the upcoming months except a gentleman who stays with us once a month. If we relied on the B&B alone, we would have gone bust”
B&B, North West

“I've got absolutely no bookings for the summer period. I do hope it will improve because it really can't get any worse”
B&B, South West

“I've got no bookings for the summer either. It really is an awful situation”
B&B, East of England

Confidence

6.4 Confidence for the remainder of spring and summer is reasonably high.

“We’re very confident about this year”
Caravan park, East of England

“We feel very positive about this year”
Caravan park, East Midlands
Expectations for last minute bookings

6.5 The expectation that many people will book last minute again this year contributes to the high level of confidence. Some operators say it is too early to tell how business will be over the summer and the weather plays a major part.

“I think people will leave it until later on in the year to book so I'm not worried”
B&B, South West

“People are booking later, so that's why the numbers are looking lower”
Hotel, London

“We're expecting late bookings, the same as last year”
Guesthouse, London

Staycationers

(Q11) "Last year British tourism experienced an increase in "Staycationers", with more people choosing to take holidays in Britain than in recent years. In your view, what will happen to domestic holidays in 2010?"

- More people will take holidays in Britain this year: 21%
- Similar numbers will take holidays in Britain this year: 39%
- Fewer people will take holidays in Britain than last year, but more than pre-recession: 15%
- Numbers will drop back to pre-recession levels: 3%
- Don't know: 22%

6.6 Opinion is divided over whether the ‘staycation’ trend will continue in 2010, and if so, to what extent.

“I think that more people will go abroad this year as that is where the cheaper holidays are and you get guaranteed sun”
B&B, Yorkshire
“Due to travel conflicts, the economy and the Euro, I think that a lot of people will stay in Britain for their holidays. It is too expensive to go abroad these days”
B&B, South West

“We’re hoping because the Euro is so strong that British tourists stay in the country this year”
Caravan park, East of England

“I am planning ahead for autumn already. Many of my guests have told me due to the economic situation they would rather stay in Britain for holidays even though they have the money to go abroad”
B&B, West Midlands

“Last year ... was the best year I’ve had in the four that I’ve owned the business. People are going abroad this year, they’ve had enough”
B&B, London

Weather, exchange rates, transport strikes and election are the key factors

6.7 Many operators say that a number of key factors will determine what happens with domestic holidays this year. It is too early to tell because these are all ‘variables’ which could change significantly between now and the summer.

“I think the jump last year was because of the supposed ‘barbeque summer’ but I think a lot of people have had enough of the bad weather this year and will go elsewhere. The economy had a part to play but it’s more about the weather”
Self catering, East Midlands

“I think the air strikes may put people off going abroad, but then rail strikes may put people off staying in Britain. Also it’s an election year this year which always affects tourism”
Hotel, South West

“Levels of staycationers will depend on the weather. If we have another bad summer I think more people will go abroad”
B&B, North West

“I think slightly more people will holiday in Britain this year, but it could be more or less people depending on the strength of the pound and the euro and what happens with all the transport and airline strikes”
B&B, North West

“As the Euro rate is so bad at the moment, people will stay in the UK more I think”
Caravan park, East of England
“Because of the uncertainty over the air strikes and things like that, I feel that more people will choose to holiday in Britain rather than go abroad”
B&B, South West

“I think a lot of people stayed in Britain last year because of the transport problems and airline strikes. Thanks to the awful weather we had, I think a lot of people will be returning to their package holidays in the sun this year”
Guesthouse, London

“I think everyone is waiting for the election to make a decision about their holidays”
B&B, West Midlands

“People might be putting extra holidays on hold until they see the outcome of the election budget, as have a lot of pensioners with a fixed income and they may not be able to afford additional holidays”
Caravan park, North East

“There is a very hot summer predicted this year. Hopefully that will help keep people in Britain but it all really depends on the weather and on British Airways”
B&B, Yorkshire
7. Trend Figures Across Research Waves

7.1 This survey is the second of four or five waves planned in 2010. As more waves are conducted, trend charts will be built up over time. Below are charts based on results from wave 1 (January) and this wave (Q1 / Easter).

Visitor Numbers

![Actual visitor numbers trend - Hotels](chart)

7.2 Trend charts by actual visitor numbers are split by sector – the first chart (above) is for hotels.

7.3 After a reasonable start to the year, hotels’ performance in terms of visitor numbers declined in Q1.
7.4 The year did not start well for the guesthouse / B&B sector, and then performance has deteriorated further in Q1 following immense price competition from hotels.

7.5 Self catering had a reasonable start to the year but the proportion reporting decreased visitor numbers rose significantly in Q1.
7.6 Many caravan & campsites were closed during Xmas / New Year and Q1, and so differences in the figures are not significant with the small sample sizes (50 – 64).

**Profitability**

7.7 The reasonable visitor numbers over Xmas and New Year came at the expense of profit margins. Remaining profitable has also been a problem in Q1, but at least the figures are in line with visitor numbers, which means that margins have been maintained.
Advance bookings

7.8 Each wave, advance booking data has been gathered about future periods. These periods overlap and the chart shows which wave the figures are drawn from (W1 or W2).

7.9 The outlook becomes marginally more promising as the year progresses.

Confidence

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7.10 As with advance bookings, respondents have been asked their level of confidence about future periods. The chart shows which wave (W1 or W2) the figures are drawn from.

7.11 So far confidence has remained fairly consistent.
8. Expenditure

(Q12) "Compared to last year are you planning to increase or decrease the following types of expenditure this year?"

<table>
<thead>
<tr>
<th>Type</th>
<th>Increase</th>
<th>Same</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment in property or maintenance</td>
<td>30%</td>
<td>64%</td>
<td>6%</td>
</tr>
<tr>
<td>Marketing</td>
<td>25%</td>
<td>61%</td>
<td>14%</td>
</tr>
<tr>
<td>Staff training</td>
<td>11%</td>
<td>86%</td>
<td>3%</td>
</tr>
<tr>
<td>Employment of staff</td>
<td>9%</td>
<td>86%</td>
<td>3%</td>
</tr>
</tbody>
</table>

8.1 Some owners do not employ staff and so all ‘not applicable’ answers have been removed from the results and the percents re-based. This includes 32% n/a for ‘staff training’ and 26% n/a for ‘employment of staff’.

8.2 In spite of a difficult quarter, businesses are mostly planning to keep their expenditure the same as last year or increase it, especially on property or maintenance and marketing.

“We have invested a lot in our marketing because we believe it is going to benefit our business in the long run”
B&B, West Midlands

“We will be investing more in marketing this year”
Caravan park, North West

“Extra advertising has worked ... decided to really go for it this year”
Self catering, Yorkshire
9. Price Discounting and Special Offers

(Q13) "Did you undertake any price discounting or special offers last year?"

- **Hotel**: 79% Yes, 21% No
- **Guesthouse / B&B**: 44% Yes, 56% No
- **Caravan & camping**: 39% Yes, 61% No
- **Self catering**: 36% Yes, 64% No
- **Overall**: 48% Yes, 52% No

9.1 Last year about half (48%) of operators undertook price discounting or special offers – many of them in an attempt to fill bed space during the recession. This practice was prominent in the hotel sector.

9.2 This year a very similar proportion (49%) of operators intend to undertake price discounting or special offers. The proportions in each sector are very similar to last year, including 83% of hotels.
9.3 The above question has been asked to operators who undertook price discounting / special offers both last year and intend to do it again this year – 210 operators.

**No let up for B&B’s**

9.4 It appears that price discounting in the industry will be deployed at least as much as last year, probably more. This is bad news for the guesthouse / B&B sector, which has already been suffering from fierce price competition from the hotel sector.

“I’m going to see how it goes this summer. If it isn’t a good summer for me I’m thinking about packing it all in. All the big hotels and travel companies are running so many deals that I just can’t compete with them”

B&B, Yorkshire

“The phone has stopped ringing, probably because of the two Travelodges nearby”

B&B, London
“I’m not very confident it all depends on the weather and competitors like the Premier Inn. There’s a chain not far from here with rooms for £19 a night - you just can’t compete with that. Even though that doesn’t include breakfast, people just don’t seem to be as bothered by that anymore”
B&B, North West

Price discounting is a last resort for many

9.5 Although many operators are considering discounting their prices, it is certainly not something they want to do if they can help it. In times of rising operating costs, even just holding prices as they are means reduced profit margins.

“We want to get our rates back to the levels they were at three years ago before the recession to try and get some money back”
Hotel, North East

“I hope I don’t have to do special offers this year”
Caravan park, Yorkshire

“It’s hard to judge whether to do discounts or special offers as some people might think you’re desperate for customers and then they’ll be put off”
Caravan park, East Midlands

“Marketing has been important over the last couple of years and having offers has helped fill quiet times. It’s a competitive market now and new ideas are important”
Hotel, North West

“Business has been very bad lately ... We never used to do special offers but now we will have to”
B&B, North East

No need to discount

9.6 Some businesses are in a very fortunate position of being so booked up that they don’t need to consider giving beds away.

“No need for discounts, have a steady stream of guests all year round”
Self catering, South West

“We don’t need to give discounts or special offers as we have enough custom throughout the year”
Caravan park, North West