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.

Easter 2012 fieldwork: 16-23 April 2012
### Accommodation sample targets (total 500)

<table>
<thead>
<tr>
<th></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>East Midlands</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>East of England</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>London</td>
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</tr>
<tr>
<td>Yorkshire</td>
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</table>

- 25 hotels with over 100 bedspaces
- 60 guest houses / B&Bs with over 10 bedspaces
- 35 self-catering with over 10 bedspaces
- 40 caravan / campsites with over 100 bedspaces
Key Findings for Accommodation: Easter 2012 (1)

Difficult Easter trading, with more accommodation businesses reporting declines in visitors than increases compared with the same period last year. Growth in visitors was much more likely to have been reported this time last year.

The months up to Easter 2012 were also challenging for accommodation. Overall, for the year to date, visitor numbers are estimated to have fallen by -2% compared with last year.

- Hotels more likely to have been resilient, although guest houses/B& Bs have found going toughest in 2012.
- Non-serviced accommodation has seen a challenging start to the year, with visitor numbers struggling to keep pace with 2011. Caravan/camping had a particularly tough Easter, visits down an estimated -3%.

The larger accommodation establishments are significantly more likely to have reported an increase in visitor numbers over Easter this year.

The wetter, colder weather over the Easter period compared with 2011 was a negative factor for many.

Other factors restricting growth mentioned at Easter included the continuing impact of the economy, a trend towards late bookings, increasing competition in some areas and the potential fuel strike.

Accommodation more likely to be reporting declines in domestic visitors for the year-to-date: perhaps also weather-related, with accommodation not seeing late bookings from this market.

Despite this, business performance satisfaction levels were similar to those reported for Easter 2011. However, given the tough start for the year as a whole, there is now a notable quarter who are not satisfied with their business performance for the year to date.

Definite signs of increasing loyalty towards accommodation – using the tried and trusted. A third report seeing repeat visitors up compared with just one in ten seeing them down.
Key Findings for Accommodation: Easter 2012 (2)

Despite the challenging start to the year, business confidence for the Spring/Jubilee period is high. For accommodation, confidence is at similar levels to the same period last year

- Confidence much higher among the non-serviced sector, particularly caravan/camping
- Confidence among accommodation perhaps driven by strong advanced booking levels, with two-thirds reporting these as at least ‘good’

Higher confidence in the non-serviced accommodation sector translated into more aggressive tariff increases for 2012 (particularly among caravan/camping sector), although even among non-serviced sector, half claim not to have increased prices at all

Among the serviced sector, only 42% of hotels and just 35% of guest houses/B&Bs claim that they will be putting up tariffs in 2012

Again, the larger accommodation is more bullish, with two-thirds of accommodation with over 100 bedspaces increasing tariffs compared with just a third of those with less than 10 bedspaces

Still around a fifth of accommodation businesses feeling positive about the impact of the Olympics, although a slight decline in positivity since the end of 2011

- Positivity way higher among London accommodation (three-quarters positive), with this increasing as the event approaches and advanced bookings take shape

Positivity towards the Queen’s Diamond Jubilee and extra Bank Holiday much higher than for the Olympics and similar across England, with over a third feeling that it will have a positive impact
Business Performance Dashboard: Accommodation

**Visitor numbers (%)**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2011</th>
<th>Easter 2012</th>
<th>2011</th>
<th>YTD 2012</th>
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</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>39</td>
<td>33</td>
<td>41</td>
<td>35</td>
</tr>
<tr>
<td>Guest House / B&amp;B</td>
<td>36</td>
<td>32</td>
<td>34</td>
<td>22</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>25</td>
<td>36</td>
<td>25</td>
<td>42</td>
</tr>
</tbody>
</table>

*Versus same period previous year…*
- Up
- Same
- Down

**Satisfaction (%)**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2011</th>
<th>Easter 2012</th>
<th>2011</th>
<th>YTD 2012</th>
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</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>34</td>
<td>35</td>
<td>24</td>
<td>29</td>
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<tr>
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<td>45</td>
<td>46</td>
<td>58</td>
<td>44</td>
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<tr>
<td>Self-Catering</td>
<td>18</td>
<td>12</td>
<td>16</td>
<td>21</td>
</tr>
</tbody>
</table>

*Satisfied…*
- Very
- Quite
- Not very
- Not at all

**Hotels**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2012</th>
<th>Easter 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>43</td>
<td>43</td>
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<tr>
<td>Same</td>
<td>23</td>
<td>35</td>
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<tr>
<td>Down</td>
<td>35</td>
<td>22</td>
</tr>
</tbody>
</table>

**Guest House / B&B**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2012</th>
<th>Easter 2011</th>
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<tbody>
<tr>
<td>Up</td>
<td>28</td>
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</tr>
<tr>
<td>Same</td>
<td>29</td>
<td>38</td>
</tr>
<tr>
<td>Down</td>
<td>43</td>
<td>35</td>
</tr>
</tbody>
</table>

**Self-Catering**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2012</th>
<th>Easter 2011</th>
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</thead>
<tbody>
<tr>
<td>Up</td>
<td>35</td>
<td>27</td>
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<tr>
<td>Same</td>
<td>41</td>
<td>53</td>
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<tr>
<td>Down</td>
<td>24</td>
<td>20</td>
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**Caravan / Camping**

<table>
<thead>
<tr>
<th></th>
<th>Easter 2012</th>
<th>Easter 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up</td>
<td>29</td>
<td>51</td>
</tr>
<tr>
<td>Same</td>
<td>33</td>
<td>40</td>
</tr>
<tr>
<td>Down</td>
<td>38</td>
<td>9</td>
</tr>
</tbody>
</table>

VisitEngland
Business Confidence Dashboard: Accommodation

- **Hotels**
  - W2 2012: 35% very confident, 52% fairly confident
  - W2 2011: 52% very confident, 39% fairly confident

- **Guest House / B&B**
  - W2 2012: 35% very confident, 43% fairly confident
  - W2 2011: 32% very confident, 52% fairly confident

- **Self-Catering**
  - W2 2012: 45% very confident, 37% fairly confident
  - W2 2011: 27% very confident, 54% fairly confident

- **Caravan / Camping**
  - W2 2012: 53% very confident, 36% fairly confident
  - W2 2011: 54% very confident, 37% fairly confident

**Notes:**
- W2 2011: beyond Easter
- W2 2012: late Spring early June incl. Jubilee
Visitor numbers: Year-on-year changes (up / down)

Easter 2012 challenging compared with the same trading period in 2011, with visitor numbers more likely to be down than up so far this year. Accommodation reported a particularly challenging time in the months before Easter.
Visitor numbers: year-on-year changes (up/down) by accommodation type

Guest houses/B&Bs have found the going toughest so far in 2012, with almost half reporting visitor numbers down on last year. Hotels appear most resilient so far this year.

- **Guest Houses / B&Bs**
  - YTD 2012: 24% Up, 4% Slightly up, 45% Exactly same, 20% Slightly down, 7% Down
  - Easter 2012: 20% Up, 4% Slightly up, 29% Exactly same, 7% Slightly down, 36% Down

- **Hotels**
  - YTD 2012: 39% Up, 10% Slightly up, 19% Exactly same, 3% Slightly down, 29% Down
  - Easter 2012: 34% Up, 9% Slightly up, 23% Exactly same, 4% Slightly down, 31% Down

- **Self-catering**
  - YTD 2012: 32% Up, 3% Slightly up, 23% Exactly same, 8% Slightly down, 33% Down
  - Easter 2012: 27% Up, 9% Slightly up, 41% Exactly same, 4% Slightly down, 20% Down

- **Caravan / Camping**
  - YTD 2012: 27% Up, 8% Slightly up, 25% Exactly same, 6% Slightly down, 33% Down
  - Easter 2012: 27% Up, 2% Slightly up, 33% Exactly same, 6% Slightly down, 33% Down
Visitor numbers more likely to have decreased than increased so far in 2012 for accommodation, with visitor numbers estimated to have fallen around -2% so far this year. Easter visitor numbers were better, staying similar to last year.

Average % change

YTD 2012: -2%
Easter 2012: -*%
Visitor numbers, year-on-year changes (%) by accommodation type

Hotels were the only category of accommodation to report an increase in visitors over Easter and so far this year. Guest houses/B&Bs have reported the largest decline in visitors so far this year, at -4%.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>YTD 2012</th>
<th>Easter 2012</th>
<th>Average % change</th>
</tr>
</thead>
<tbody>
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<td>5</td>
<td>+2%</td>
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<td></td>
<td>24</td>
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<td></td>
<td>7</td>
<td>5</td>
<td></td>
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<tr>
<td><strong>Self-catering</strong></td>
<td>12</td>
<td>11</td>
<td>-2%</td>
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<td>9</td>
<td>7</td>
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</tr>
<tr>
<td><strong>Guest Houses / B&amp;Bs</strong></td>
<td>8</td>
<td>6</td>
<td>-4%</td>
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<td>4</td>
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</tr>
<tr>
<td><strong>Caravan / Camping</strong></td>
<td>5</td>
<td>5</td>
<td>-3%</td>
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<td>16</td>
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<td>7</td>
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</tr>
</tbody>
</table>

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%
Positive verbatim comments on business performance: Accommodation

We've had loads of conferences this year and some fell into the Easter

People are tending to have several smaller breaks rather than a big holiday and Whitby is known as being a location for smaller breaks so that impacted Easter. I have also noticed that people are booking later than before - I don't know why, maybe they are waiting to see how things are economically

We have a better, improved and upgraded website. We are doing quite well because we have very good agents who got people in for Easter

It's repeat bookings and the fact that we've got a good reputation. Word of mouth from friends who have been before

Easter fell on a good spread during April between 2 half terms/ and bobs ya uncle it makes a difference!!

We put bargain signs up online. If they stay a week or more they get a discount on the price, so this had a positive effect

My reviews on Trip Advisor - everyone that has written something has had good things to say

I think what VisitYork does with regard to tourist attractions has helped. They seem to be able to provide attractions for tourists all year round. They've got a good VisitYork website and we're linked to that as well. They've also got links to Facebook as well

We joined Laterooms and bookings.com

The personal attention, our local knowledge and that we can advise them of places to eat and visit. That's the nicer touch than a hotel.
The economy; people are scared about being made redundant and not staying as long.

People react to the cold weather, they don't book. If the sun comes out they start booking.

We have a lot of European visitors and because of the economy at the moment and problems with the Euro. They're not booking so far in advance as they used to. It's a lot more short term last minute bookings, a lot more precarious than it used to be.

People are booking on sites such as lastminute.com and they take up to 15% of the profit.

Everyone is booking last minute. The bookings ahead aren't looking too great.

Because of the recession, people are not spending as last year or the year before. Because petrol and diesel's gone up in price.

People did not come over because they panicked that if they came, will they be able to get any fuel to take them back?

We have a lot of chain of hotels opening everywhere.

Last year we had a spread of two weeks of holidays that went with the Bank Holiday. So we had a group before and a group after the weekend. This year that didn't seem to happen.

The economic situation, most of our visitors are between 50-70 yrs old and because they are pensioners they are feeling the crunch.

The weather. It's been favourable in April up until now it has changed a bit for the worst.
Definite signs of increasing loyalty towards accommodation – using the tried and trusted. A third report seeing repeat visitors up compared with last year, compared with just one in ten who report a decline.
Changing Visitor Profile (year-to-date vs. previous year):
Accommodation type

Repeat visitors up across all accommodation types. Guest houses/B&Bs perhaps suffering more than most from a decrease in overseas visitors.

### Domestic visitors (YTD)

- **Hotels**: 22 Up, 53 Same, 25 Down
- **Guest Houses / B&Bs**: 25 Up, 44 Same, 31 Down
- **Self-Catering**: 29 Up, 41 Same, 30 Down
- **Caravan / Camping**: 27 Up, 51 Same, 22 Down

### Overseas visitors (YTD)

- **Hotels**: 29 Up, 49 Same, 22 Down
- **Guest Houses / B&Bs**: 15 Up, 54 Same, 30 Down
- **Self-Catering**: 28 Up, 50 Same, 21 Down
- **Caravan / Camping**: 16 Up, 61 Same, 23 Down

### Repeat visitors (YTD)

- **Hotels**: 37 Up, 54 Same, 10 Down
- **Guest Houses / B&Bs**: 29 Up, 61 Same, 11 Down
- **Self-Catering**: 36 Up, 55 Same, 9 Down
- **Caravan / Camping**: 29 Up, 62 Same, 9 Down
Changing business performance: By accommodation type

Hotels most likely to have seen visitors increase for Easter 2012, although satisfaction is lower – are their expectations higher? Satisfaction among self catering accommodation highest

% Visitors up on last year

Easter 2012

- Hotel: 43
- Guest / B&B: 35
- Self catering: 29
- Caravan / camping: 28

% Very satisfied

Easter 2012

- 46
- 39
- 81
- 25
Changing business performance: By accommodation size

The larger accommodation establishments are significantly more likely to have reported an increase in visitor numbers over Easter this year.

% Visitors up on last year

- 44
- 37
- 23

Easter 2012
- Up to 10 bedspaces
- 11-100 bedspaces
- Over 100 bedspaces

% Very satisfied

- 45
- 34
- 33

Easter 2012
Seaside accommodation most likely to have been satisfied with their business performance over Easter. Although visitors most likely to be up on last year among establishments based in urban areas, satisfaction is much lower – again, much higher expectations?

**% Visitors up on last year**

- 42%
- 36%
- 30%
- 29%

**% Very satisfied**

- 42%
- 40%
- 34%
- 22%

Easter 2012

Seaside, Large town or city, Small town, Countryside / village
Confidence for forthcoming period: Accommodation

Caravan/camping and self catering accommodation most confident for the late Spring/Jubilee period

% Very confident

- Hotel: 53
- Guest / B&B: 45
- Self catering: 35
- Caravan / camping

Spring 2012
Confidence for forthcoming period: By accommodation size and location

Reflecting recent business performance, the larger accommodation establishments are more confident about the forthcoming trading period.

**Size**

<table>
<thead>
<tr>
<th>% Very confident</th>
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</thead>
<tbody>
<tr>
<td>▲52</td>
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<tr>
<td>■42</td>
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<tr>
<td>◇35</td>
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</tbody>
</table>

- Up to 10 bedspaces
- 11-100 bedspaces
- Over 100 bedspaces

Spring 2012

**Location**

<table>
<thead>
<tr>
<th>% Very confident</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲45</td>
</tr>
<tr>
<td>△41</td>
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<tr>
<td>■38</td>
</tr>
</tbody>
</table>

- Seaside
- Large town or city
- Small town
- Countryside / village

Spring 2012
Advance booking levels: Accommodation

Advanced booking levels for accommodation looking positive for the late Spring/Jubilee period, with two-thirds feeling these are at least ‘good’. Guest houses/B&Bs a little behind the curve.
Positive verbatim comments on business confidence: Accommodation

Well because the effect of the Jubilee, the number of bookings has been quite optimistic, so it makes us think that it will continue

Hopefully, because of the Olympics and the Queen’s Jubilee, it will at least remain the same as last year

Because of the special offer we are offering throughout the year

The weather usually dictates business so if the weather is good business will be and if its bad then business will be bad

Business and business market is stronger and customers may stay at home rather than going abroad

We have increased our budget for advertising, so we should see an improvement in the business

We have a very good online booking system and the bookings are coming in fast. The Olympics will also help

We’re getting more bookings - we have had an increase of repeat visitors

The local tourist info centre just re-opened through the National Trust - when they closed that affected a lot of businesses in the area

Because of the business that I already have booked. We already have bookings that looks good

Because of the business on the books we have at the moment. The increase of travellers to London, the Olympics after all
Negative verbatim comments on business confidence: Accommodation

People are going to have a rude awakening. This year will be the worst for many years for many of us. I feel that it's going to get worse each year from here on in until the overall economic situation is address worldwide.

If there's any changes in tax. There was a move last year to change the tax. I'll make less profit, I may sell out and start something new.

People are asking for discounts this year, where they didn't before. I think it's a general trend this year where so many businesses are doing it that people have become accustomed to asking for it.

People don't want to spend as much. They would rather have midweek as its cheaper. They'd rather have a shorter cheaper stay.

Fuel, its just too expensive. Towing caravans is too expensive so I don't know what will happen later on down the line it depends on then petrol situation.

They are looking to put a 20% VAT on caravans which will of course have a huge impact on the business. Purely the charges in the budget will have the greatest impact.

Economic climate lack of confidence and fuel strikes is simmering.

Most of our customers are British and they have no money. The government is driving everybody’s wages down and because of that people aren't taking any holidays.

Something that could affect us negatively is that there will be another big hotel opening up in the city centre soon and that could affect us, especially because of their cheaper deals.

A lot of ours are older people and they're relying on investment earnings which they just aren't getting. They're touring caravans and because fuel prices are up.
Changing tariffs in 2012 compared with 2011

Less than half of accommodation are increasing their tariffs for 2012. Those with over 100 bedspaces much more bullish over tariffs, although most increasing by 5% or less. Non-serviced accommodation also more bullish, particularly camping/caravan sites.

<table>
<thead>
<tr>
<th>Type</th>
<th>1-2%</th>
<th>3-5%</th>
<th>6-10%</th>
<th>Over 10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Accommodation</td>
<td>14%</td>
<td>21%</td>
<td>6%</td>
<td>43%</td>
</tr>
<tr>
<td>Hotel</td>
<td>15%</td>
<td>22%</td>
<td>3%</td>
<td>42%</td>
</tr>
<tr>
<td>Guest house / B&amp;B</td>
<td>10%</td>
<td>16%</td>
<td>6%</td>
<td>35%</td>
</tr>
<tr>
<td>Self-catering</td>
<td>14%</td>
<td>25%</td>
<td>7%</td>
<td>48%</td>
</tr>
<tr>
<td>Caravan / camping</td>
<td>22%</td>
<td>22%</td>
<td>8%</td>
<td>56%</td>
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<table>
<thead>
<tr>
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<th>3-5%</th>
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<tbody>
<tr>
<td>Up to 10</td>
<td>12%</td>
<td>14%</td>
<td>7%</td>
<td>35%</td>
</tr>
<tr>
<td>10-100</td>
<td>16%</td>
<td>21%</td>
<td>4%</td>
<td>43%</td>
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<tr>
<td>Over 100</td>
<td>17%</td>
<td>36%</td>
<td>8%</td>
<td>65%</td>
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<table>
<thead>
<tr>
<th>Location</th>
<th>1-2%</th>
<th>3-5%</th>
<th>6-10%</th>
<th>Over 10%</th>
</tr>
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<tbody>
<tr>
<td>Seaside</td>
<td>18%</td>
<td>17%</td>
<td>5%</td>
<td>42%</td>
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<tr>
<td>Large town/city</td>
<td>10%</td>
<td>24%</td>
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<td>46%</td>
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<tr>
<td>Small town</td>
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<td>17%</td>
<td>22%</td>
<td>37%</td>
</tr>
<tr>
<td>Countryside/village</td>
<td>12%</td>
<td>23%</td>
<td>7%</td>
<td>45%</td>
</tr>
</tbody>
</table>
Impact of 2012 Olympics: Accommodation

Little change in positivity towards the Olympics among accommodation, with around a fifth positive and most feeling that there will be little or no impact on their business.

- **May 2011**:
  - Very positive: 7%
  - Fairly positive: 14%
  - Little / none: 68%
  - Fairly negative: 3%
  - Very negative: 2%
  - Don't know: 8%

- **Easter 2012**:  
  - Very positive: 7%
  - Fairly positive: 14%
  - Little / none: 68%
  - Fairly negative: 3%
  - Very negative: 2%
  - Don't know: 8%

Graph showing % Positive from May 2011 to Easter 2012:

- May 2011: 21%
- Jul 2011: 21%
- Sep 2011: 19%
- Nov 2011: 23%
- Jan 2012: 24%
- Easter 2012: 21%
Impact of 2012 Olympics: Accommodation by region

Impact much more positive among London accommodation and increasingly so as the Olympics draws closer and advance bookings take shape.
Impact of Queen’s Diamond Jubilee and extra Bank Holiday: Accommodation

Generally positive attitude towards the impact of the Jubilee and Bank Holiday period

- Very positive: 16%
- Fairly positive: 23%
- Little / none: 49%
- Fairly negative: 5%
- Very negative: 5%
- Don't know: 5%

Chart showing the percentage of positive responses for Easter 2012 compared to January 2012.

VisitEngland
Impact of Queen’s Diamond Jubilee and extra Bank Holiday: Accommodation by region

Positive attitude is similar across England

% Positive

Jan 2012

Easter 2012

London
South East
Midlands / SW
North

VisitEngland
## Performance and confidence snapshot: Easter 2012

<table>
<thead>
<tr>
<th></th>
<th>Visitor Numbers (Easter)</th>
<th>Visitor Numbers (Year-to-date)</th>
<th>Confidence (Late spring / early June)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Up</td>
<td>Same</td>
<td>Down</td>
</tr>
<tr>
<td><strong>TOTAL (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>43</td>
<td>23</td>
<td>35</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>28</td>
<td>29</td>
<td>43</td>
</tr>
<tr>
<td>Self catering</td>
<td>35</td>
<td>41</td>
<td>24</td>
</tr>
<tr>
<td>Caravan / camping</td>
<td>29</td>
<td>33</td>
<td>38</td>
</tr>
<tr>
<td><strong>Up to 10 (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>23</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>37</td>
<td>29</td>
<td>34</td>
</tr>
<tr>
<td>Self catering</td>
<td>44</td>
<td>24</td>
<td>32</td>
</tr>
<tr>
<td><strong>11-100 (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>5</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>30</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Self catering</td>
<td>31</td>
<td>31</td>
<td>38</td>
</tr>
<tr>
<td><strong>Over 100 (%)</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>36</td>
<td>27</td>
<td>36</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>42</td>
<td>19</td>
<td>40</td>
</tr>
<tr>
<td>Self catering</td>
<td>30</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td><strong>Seaside (%)</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>36</td>
<td>30</td>
<td>34</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>42</td>
<td>19</td>
<td>40</td>
</tr>
<tr>
<td>Self catering</td>
<td>30</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td><strong>Large town / city (%)</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>29</td>
<td>35</td>
<td>36</td>
</tr>
</tbody>
</table>