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.

**Sept 2012 Fieldwork:** 10\(^{th}\) to 17\(^{th}\) Sept 2012, reviewing the school summer holidays

**July 2012 fieldwork:** 16\(^{th}\) to 24\(^{th}\) July 2012, reviewing the period after the jubilee bank holiday weekend until mid July

**June 2012 fieldwork:** 11\(^{th}\) to 15\(^{th}\) June 2012, reviewing May and early June period, including the Jubilee Bank Holiday weekend.

**Easter 2012 fieldwork:** 16-23 April 2012, reviewing January to April period
## 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>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>North East</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>North West</td>
<td>18</td>
<td>18</td>
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<tr>
<td>South East</td>
<td>17</td>
<td>35</td>
</tr>
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<td>South West</td>
<td>19</td>
<td>35</td>
</tr>
<tr>
<td>West Midlands</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>10</td>
<td>15</td>
</tr>
</tbody>
</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**

This is the target sample for each wave, reflecting the profile of attractions in England. There are minor variations wave on wave, which are corrected by weighting the profile if needed.
Aside from businesses directly benefiting from the Olympics, the summer holidays has remained a difficult period for accommodation businesses.

Post summer holidays accommodation venues report a continued stagnation of their business. Guest numbers are down 6% and over half of businesses report a reduction in business compared with the same period in 2011.

As such, most accommodation businesses continue to be reliant on repeat visitors to fill bed spaces.

Hotels continue to be the most resilient sector and are seeing a resurgence of domestic and overseas visitors.

Caravan/ campsites continue to struggle, although the net change in visitors attending campsites has improved slightly over the summer – now down 11% on last year, compared with -18% before the summer holidays.

Although business remains unsteady, satisfaction has improved across the board.
Post Olympics, we are starting to see a little more confidence in the market, driven by some long awaited sunshine, alongside the close of the Olympics and Paralympics.

Although the Games are thought to have had a negative impact on tourism in the short term, there is some optimism for its potential to drive longer term business for UK and advance booking levels remain reasonably healthy.

Despite their performance over the summer, self catering businesses are the most optimistic about the forthcoming period, buoyed by good continuing levels of advance bookings.

Although large business performance improved over the summer (as expected), they are the least confident looking up to the October half term.

However, large towns and cities show more optimism for the industry, perhaps in anticipation of more business travel post Olympics.
Business Dashboard
Business Performance Dashboard: Accommodation

## Visitor Numbers

### Visitor numbers (%)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>28</td>
<td>53</td>
<td>32</td>
<td>57</td>
</tr>
<tr>
<td>Guest house/ B&amp;B</td>
<td>40</td>
<td>24</td>
<td>34</td>
<td>19</td>
</tr>
<tr>
<td>Self-catering</td>
<td>32</td>
<td>22</td>
<td>34</td>
<td>23</td>
</tr>
<tr>
<td>Caravan/ camping</td>
<td>40</td>
<td>17</td>
<td>16</td>
<td>65</td>
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</tbody>
</table>

### Satisfaction

### Satisfaction (%)

<table>
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<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>5</td>
<td>16</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Guest house/ B&amp;B</td>
<td>45</td>
<td>32</td>
<td>30</td>
<td>23</td>
</tr>
<tr>
<td>Self-catering</td>
<td>45</td>
<td>32</td>
<td>34</td>
<td>20</td>
</tr>
<tr>
<td>Caravan/ camping</td>
<td>17</td>
<td>16</td>
<td>16</td>
<td>65</td>
</tr>
</tbody>
</table>

### Satisfaction with Performance (%)

<table>
<thead>
<tr>
<th></th>
<th>Not at all</th>
<th>Not very</th>
<th>Quite</th>
<th>Very</th>
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</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>29</td>
<td>51</td>
<td>80</td>
<td></td>
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<tr>
<td>Guest house/ B&amp;B</td>
<td>31</td>
<td>41</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Self-catering</td>
<td>40</td>
<td>43</td>
<td>83</td>
<td></td>
</tr>
<tr>
<td>Caravan/ camping</td>
<td>26</td>
<td>44</td>
<td>70</td>
<td></td>
</tr>
</tbody>
</table>

**PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE**

- Sept 2012: Over the school summer holidays
- Sept 2011: Over the school summer holidays
Business Confidence Dashboard: Accommodation

PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
Sept 2012: Period until end of October
Sept 2011: Period until end of October

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Sept 2012</th>
<th>Sept 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very confident</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fairly confident</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotels</td>
<td>29</td>
<td>40</td>
</tr>
<tr>
<td>Guest House / B&amp;B</td>
<td>30</td>
<td>25</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>39</td>
<td>20</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>27</td>
<td>29</td>
</tr>
</tbody>
</table>
Visitor profile
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

**Domestic visitors**
- Sep-12: 18 (Up), 45 (Same), 38 (Down) -20
- Sep-11: 31 (Up), 40 (Same), 29 (Down) +2

**Overseas visitors**
- Sep-12: 19 (Up), 47 (Same), 34 (Down) -15
- Sep-11: 23 (Up), 54 (Same), 23 (Down) 0

**Repeat visitors**
- Sep-12: 28 (Up), 59 (Same), 13 (Down) +15

**NET:**
- Up - Down
Changing Visitor Profile (year-to-date vs. previous year): Accommodation type

Most accommodation businesses continue to be reliant on repeat visitors to fill bed spaces, although hotels are now seeing a resurgence of domestic and overseas visitors.

### Domestic visitors (YTD)

<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>26</td>
<td>53</td>
<td>21</td>
<td>+5</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>19</td>
<td>41</td>
<td>40</td>
<td>-21</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>16</td>
<td>50</td>
<td>34</td>
<td>-18</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>11</td>
<td>38</td>
<td>52</td>
<td>-41</td>
</tr>
</tbody>
</table>

### Overseas visitors (YTD)

<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>33</td>
<td>41</td>
<td>26</td>
<td>+7</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>19</td>
<td>45</td>
<td>36</td>
<td>-17</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>17</td>
<td>50</td>
<td>33</td>
<td>-16</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>11</td>
<td>51</td>
<td>38</td>
<td>-27</td>
</tr>
</tbody>
</table>

### Repeat visitors (YTD)

<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>31</td>
<td>59</td>
<td>10</td>
<td>+21</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>31</td>
<td>56</td>
<td>14</td>
<td>+17</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>28</td>
<td>57</td>
<td>14</td>
<td>+14</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>21</td>
<td>66</td>
<td>13</td>
<td>+8</td>
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</tbody>
</table>
Past performance
Visitor numbers: Year-on-year changes

Post summer holidays accommodation venues report a continued stagnation of their business, with over half of businesses having seen a reduction in business compared with the same period in 2011.

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2012: School summer holidays
July 2012: Jubilee bank holiday weekend until mid July
June 2012: May and early June until after Jubilee Bank Holiday
Visitor Numbers: Year-on-year changes (%)

Overall, accommodation businesses are 7% down on last year up until the end of the summer holidays. However, a significant number are managing to buck this trend…

NET % change (increase – decrease)  -7%    -6%

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2012 Over the school summer holidays
Case Study: Heath Lodge

We’ve had a great year and are fairly booked up until the end of December. We can rely on our repeat visitors - around a third of our guests have visited before - and other domestic visitors are up as well.

I think the secret to our success is just that we try to give a little bit back to our guests. I want people to go away thinking they’ve been on their best ever holiday.

We have improved the facilities this year and provide a lot for our guests to do: I leave them information about nice places to visit, provide games, and have just set up croquet course.

I also give my customers, loads of quality scones and cakes that I cook myself, and wine as well, to keep them happy!

We stay open all year, which definitely helps business. We’re a seaside resort, we make the house cosy in winter with Christmas decorations and presents for guests, which helps business.

Finally, to keep new business coming in, I do a lot of advertising.

A luxury holiday home that ‘gives a little bit back’

- Seaside self-catering accommodation
- SW England
- 4 star
- Sleeps 4

VisitEngland

11-20% increase in visitors during 2012 YTD compared with the same period in 2011

A luxury holiday home that ‘gives a little bit back’

- Seaside self-catering accommodation
- SW England
- 4 star
- Sleeps 4
Networking, promotion, friends of friends, word of mouth. We produced a brochure. Also, the economic climate may have made people stay in the UK.

I would imagine because we have a fabulous guest house! Good reviews online have influenced potential new guests.

We are in the new forest, which is a wonderful holiday location for children and people wishing to escape from the rat race.

We had special offers so that really helped the business, bringing in a lot of families. We also had a lot of repeat businesses.

We are always fully booked, because we have a unique offer, which is accommodation in railway carriages. So we don't have a lot of direct competition.
Atrocious weather and the Olympics (I'm not knocking it). Normally foreign visitors would come out to us but with the Olympics they stayed in London.

People just haven't got the money. Families have been most worst hit. There's been a big decline with the people with children - they're doing day trips instead.

It's been the worst weather conditions that I have known for forty years. My business trade which makes up for 80 per cent of my bookings has gone down.

I blame the Olympics, I have been doing bed and breakfast for 31 years and I have never known there not to be any tourists... it's just ridiculously dead, from the minute the children finished school for 6 weeks... it was just like somebody closed the door somewhere.

The factors which have affected our business are the Olympics, the weather and the general economy. The Olympics in particular decreased the number of and domestic visitors.
Visitor numbers: Year-on-year changes by accommodation type

Hotels continue to be the most resilient sector, while caravan/ campsites continue to struggle.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>YTD 2012</th>
<th>Sept 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>B&amp;B</td>
<td>55%</td>
<td>47%</td>
</tr>
<tr>
<td>Self-catering</td>
<td>48%</td>
<td>38%</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>68%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Q3/4, Q7/8
Visitor numbers: Degree of year-on-year changes by accommodation type

The net change in visitors attending campsites has improved slightly over the summer – now down 11% on last year, compared with 18% before the summer holidays.

- **Hotels**
  - YTD 2012: 8
  - Sept 2012: 12
  - Change: -4%

- **B&B**
  - YTD 2012: 2
  - Sept 2012: 5
  - Change: -7%

- **Self-catering**
  - YTD 2012: 5
  - Sept 2012: 4
  - Change: -4%

- **Caravan/Camping**
  - YTD 2012: 4
  - Sept 2012: 7
  - Change: -12%

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%

NET % change
Caravan/ campsite are satisfied with a slight revival of business, most likely associated with the shift in the weather, but other accommodation types are less likely to report an increase in business than before the summer.
Changing business performance: By accommodation location

Although business remains unsteady, satisfaction has improved across the board.

% Visitors up on last year

% Very satisfied

Easter 2012 | June 2012 | July 2012 | Sept 2012
---|---|---|---
42 | 36 | 33 | 32
36 | 33 | 31 | 32
30 | 29 | 25 | 28
29 | 25 | 19 | 18

Easter 2012 | June 2012 | July 2012 | Sept 2012
---|---|---|---
42 | 40 | 42 | 41
42 | 34 | 32 | 38
40 | 33 | 30 | 35
34 | 22 | 18 | 28
22 | 19 | 18 | 28
Future performance
Advance booking levels remain consistent with prior to the Olympics.

Bookings are best at hotels – 61% report good/very good levels (vs. 51% average)

Survey conducted:
- Easter 2012
- June 2012
- July 2012
- Sept 2012

Period asked about:
- Until after Jubilee bank hol
- Until start of summer hols
- Until end of summer hols
- Until end of October
Confidence for forthcoming period: By accommodation type

Despite performance over the summer, self catering businesses are the most optimistic about the forthcoming period, buoyed by good continuing levels of advance bookings.

CONFIDENCE: For period up until the end of October

ADVANCE BOOKINGS
Although large business performance improved over the summer (as expected), they are the least confident moving forwards.
Confidence has improved amongst accommodation businesses based in large towns/cities – perhaps in anticipation of more business travel post Olympics?
Quite positive because we have got a few events booked in and sales are on the increase. We are opening a pop up coffee shop and introducing a new pub menu.

Bookings, enquiry and trade numbers are looking better. I’d say it’s due to the weather, but people are also over the Olympics and looking for other stuff to do.

I have got 16 weeks booked up for next year already so I'm feeling positive. We are in a beautiful city with a pro-active tourism office so things are looking very good.

I'm virtually fully booked until February. We have lots of events in town, which tends to bring in most of my business.

We hope people will be booking for Christmas and New Year and Halloween events and expect the business to bloom over this period. We will have some form of advertising to keep people aware that we are there as a business and that we do offer some form of relaxation to them.
Revenue is declining but occupancy will stay the same. We've had to put on offers because of competition and to persuade people to book last minute.

I'm concerned - just knowing what the current climate is like at the moment. People have less to spend and we are not a tourist destination. Something that is affecting us is the business rates constantly going up - it's gone up £7000 pounds this year.

I don't anticipate the next couple of months to be particularly good. Enquiry levels have gone down and I would have expected a boom since the London Olympics.

I don't think it will be particularly busy because of the climate of the country. No one has money in their pocket. Like I said it's 10% down anyway. I don't think it will pick up in the next couple of months.

It's going to be tough - people aren't spending as they were and are looking for bargains because of the recession, people would spend if they had the money.
Overall the Olympics is thought to have had a slightly negative impact on business in the short term, but could have a positive impact longer term.

Positive assessment is mostly from London based establishments, and large hotels.
Verbatim comments on: the impact of the Olympics to date

POSTIVE COMMENTS

Having people staying for the Olympics created a great atmosphere and we put our rates up and were able to get more income

We have had various groups staying with us because of the Olympics. The Jessica Ennis factor has had a positive impact for us.

I think a lot of people stayed at home to watch the Olympics, people stayed in Britain and came to us as we live in a sporty area with sailing and rowing.

It was good for us, because the people that wanted to get away from the Olympics came to the area for some peace and quiet.

NEGATIVE COMMENTS

Basically I think people assumed that everywhere in England would be expensive so all tourist stayed away.

There was so much talk about how many people were coming over for the Olympics, I think it stopped a lot of people from coming over.

I think that the Olympics put off normal tourism coming to London. People thought London would be very busy so they when somewhere else.

No one was coming on holidays. They were watching the Olympics on TV...
People visiting London for the Olympics might return and go further afield. Follow on sporting events could attract more visitors.

Because of the Olympics people have taken to doing more sports. We live near the seaside, so people are being inspired by water sports and other local business have cashed in on this.

I think tourism has been generally helped by the Olympics especially businesses in and around London.

I believe that the Olympics will bring more tourists to the UK, which will in turn benefit the regions. It was an important part of a long term strategy in terms of showcasing Britain to the world.
### Performance and confidence snapshot: September 2012

<table>
<thead>
<tr>
<th></th>
<th>Visitor Numbers (September)</th>
<th>Visitor Numbers (Year-to-date)</th>
<th>Confidence (End of October)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Up</td>
<td>Same</td>
<td>Down</td>
</tr>
<tr>
<td><strong>TOTAL (%)</strong></td>
<td>22</td>
<td>24</td>
<td>53</td>
</tr>
<tr>
<td><strong>Hotel</strong></td>
<td>35</td>
<td>22</td>
<td>43</td>
</tr>
<tr>
<td><strong>Guest / B&amp;B</strong></td>
<td>25</td>
<td>20</td>
<td>56</td>
</tr>
<tr>
<td><strong>Self catering</strong></td>
<td>16</td>
<td>36</td>
<td>48</td>
</tr>
<tr>
<td><strong>Caravan / camping</strong></td>
<td>18</td>
<td>16</td>
<td>66</td>
</tr>
<tr>
<td><strong>Type (%)</strong></td>
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<td><strong>Bed-spaces (%)</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Up to 10</strong></td>
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<td><strong>11-100</strong></td>
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<td>23</td>
<td>51</td>
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<tr>
<td><strong>Over 100</strong></td>
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<td>53</td>
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<td><strong>Grading (%)</strong></td>
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<tr>
<td><strong>5 star</strong></td>
<td>28</td>
<td>19</td>
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<tr>
<td><strong>4 star</strong></td>
<td>23</td>
<td>27</td>
<td>50</td>
</tr>
<tr>
<td><strong>1-3 star</strong></td>
<td>18</td>
<td>25</td>
<td>57</td>
</tr>
<tr>
<td><strong>Budget / other</strong></td>
<td>23</td>
<td>23</td>
<td>54</td>
</tr>
<tr>
<td><strong>Location (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Seaside</strong></td>
<td>25</td>
<td>25</td>
<td>50</td>
</tr>
<tr>
<td><strong>Large town / city</strong></td>
<td>32</td>
<td>19</td>
<td>49</td>
</tr>
<tr>
<td><strong>Small town</strong></td>
<td>28</td>
<td>28</td>
<td>44</td>
</tr>
<tr>
<td><strong>Rural</strong></td>
<td>18</td>
<td>24</td>
<td>58</td>
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