Tourism Business Monitor 2014

Accommodation Report

Wave 4 – Mid-July until end of the Summer holidays
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.

Fieldwork dates:
**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
**Nov 2012:** 5-12 Nov 2012, reviewing mid-September until the end of the October
Accommodation sample targets (total 500)

<table>
<thead>
<tr>
<th>%</th>
<th>Serviced Accommodation</th>
<th>Non-serviced Accommodation</th>
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<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>
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</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.
Accommodation businesses have fared well over the peak summer period, with an overall increase in visitors of 4%, and consequently a 4% increase in visitors for the year-to-date also. Satisfaction levels are high across all accommodation business types and advance booking levels are better than at this time last year. As a result, businesses are more optimistic about their performance for the calendar year than they have been since before Jan 2013.

Only 1 in 6 accommodation businesses reported a decrease in visitor numbers compared with summer 2013, with over half doing better than last year. The strong performance over summer has boosted the year-to-date figures, with 60% reporting increases in visitors compared with last year.

Visitor growth comes from domestic, overseas and in particular repeat visitors for the year to date. Increases of visitors from all of these origins are apparent regardless of business type, although less prominent amongst self-catering businesses.

The self-catering sector seems to have had a moderate summer, with 44% reporting no change in visitor numbers compared with summer 2013. Hotels, who have performed consistently well throughout the year, reported the greatest increase in visitors for the year so far, with more than ¾ saying they’re up on the same period last year.

Good weather for most of the summer period may be what has boosted numbers of caravan/campsites saying visitors are up on last year, whilst smaller businesses have also flourished.

An uplift in visitor numbers was seen across all accommodation types, both for the latest period and for the year so far. Hotels have fared the best with overall increases in visitors of 7% for the summer period, and 6% for the Y-T-D. As a result of a strong summer all round for accommodation businesses, satisfaction levels have seen a big increase across the board.

Advance booking levels are as buoyant as they were in April this year which, discounting pre-summer periods, is better than at any other point recorded. Consequently, confidence levels for the forthcoming period are all also better than this time last year, and with 61% of businesses saying they feel that this year will be better than the last, optimism for the year as a whole is at the highest level since before Jan ‘13.
**Business Performance Dashboard: Accommodation**

**Visitor Numbers**

- Visitor numbers for period from mid-July until end of summer holidays 2014 compared with same period 2013 (%)
  - **Hotels**
    - Down 16%
    - Same 60%
    - Up 24%
    - Total 100%
  - **Guest house/B&B**
    - Down 26%
    - Same 20%
    - Up 54%
    - Total 100%
  - **Self-catering**
    - Down 15%
    - Same 44%
    - Up 65%
    - Total 100%
  - **Caravan/camping**
    - Down 21%
    - Same 28%
    - Up 51%
    - Total 100%

**Satisfaction**

- Satisfied with business performance…
  - **Hotels**
    - Not at all 37%
    - Not very 62%
    - Quite 4%
    - Very 1%
    - Total 100%
  - **Guest house/B&B**
    - Not at all 33%
    - Not very 57%
    - Quite 3%
    - Very 1%
    - Total 100%
  - **Self-catering**
    - Not at all 26%
    - Not very 65%
    - Quite 4%
    - Very 1%
    - Total 100%
  - **Caravan/camping**
    - Not at all 35%
    - Not very 59%
    - Quite 3%
    - Very 1%
    - Total 100%

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**Periord asked about for past business performance**

- Sept 2014: Mid-July up until the end of the summer holidays
Business Confidence Dashboard: Accommodation

PERIOD ASKED ABOUT FOR FUTURE BUSINESS CONFIDENCE
Sept 2014: Up until end of October
Visitor Profile
Changing Visitor Profile (year-to-date vs. previous year): Accommodation

**NET:**

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<thead>
<tr>
<th></th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Change</th>
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<tbody>
<tr>
<td>Domestic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept 14</td>
<td>36</td>
<td>52</td>
<td>12</td>
<td>+24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
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<tbody>
<tr>
<td>Overseas</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Sept 14</td>
<td>38</td>
<td>48</td>
<td>14</td>
<td>+24</td>
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<table>
<thead>
<tr>
<th></th>
<th>Up</th>
<th>Same</th>
<th>Down</th>
<th>Change</th>
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<tr>
<td>Repeat</td>
<td></td>
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<tr>
<td>Sept 14</td>
<td>38</td>
<td>58</td>
<td>4</td>
<td>+34</td>
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Changing Visitor Profile (year-to-date vs. previous year):
Accommodation type

Over half of hotels have seen increases in overseas visitors so far this year compared with last. Visitor increases of all visitor types are apparent across the board, although less prominent amongst self-catering businesses.

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<tbody>
<tr>
<td>Accommodation type</td>
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</tr>
<tr>
<td>Hotels</td>
<td>46</td>
<td>56</td>
<td>43</td>
</tr>
<tr>
<td>Guest Houses / B&amp;Bs</td>
<td>37</td>
<td>39</td>
<td>38</td>
</tr>
<tr>
<td>Self-Catering</td>
<td>26</td>
<td>30</td>
<td>35</td>
</tr>
<tr>
<td>Caravan / Camping</td>
<td>35</td>
<td>31</td>
<td>37</td>
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</table>

NET: Up - Down
- Hotels: 38
- Guest Houses / B&Bs: 21
- Self-Catering: 10
- Caravan / Camping: 26

VisitEngland
Q12
Past Performance
Visitor numbers: Year-on-year changes

Only 1 in 6 accommodation businesses reported a decrease in visitor numbers compared with summer 2013, with over half doing better than last year. The strong performance over summer has boosted the year-to-date figures, with 60% reporting increases in visitors compared with last year.

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Visitor numbers: Year-on-year changes by accommodation type

The self-catering sector seems to have had a moderate summer, with 44% reporting no change in visitor numbers compared with summer 2013.

Hotels, who have performed consistently well throughout the year, reported the greatest increase in visitors for the year so far, with more than ¾ saying they’re up on the same period last year.

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July up until the end of the summer holidays

Q3/4, Q7/8
Changing business performance: By accommodation type & bed spaces

Good weather for most of the summer period may be what has boosted numbers of caravan/campsites saying visitors are up on last year, whilst smaller businesses have also flourished. As a result of a strong summer all round for accommodation businesses, satisfaction levels have seen a big increase across the board.
Visitor Numbers: Year-on-year changes (%)

A strong performance over summer has resulted in a 4% increase in visitor numbers for that period compared to last year, which has pulled up the year-to-date figure to the same level also.

Average % change in visitor numbers:
- Sept 2014: 4%
- YTD 2014: 4%

PERIOD ASKED ABOUT FOR PAST BUSINESS PERFORMANCE
Sept 2014: Mid-July up until the end of the summer holidays
An uplift in visitor numbers was seen across all accommodation types, both for the latest period and for the year so far. Hotels, have fared the best, with overall increases in visitors of 7% for the summer period, and 6% for the Y-T-D.
The previous months have given us a good stepping stone let’s say.

Recession is ending, people have more money, we are not very expensive, we have a reasonable package.

General new advertising campaigns have increased our sales.

The commitment of our sales team has increased, as well as usage of our website, increasing year on year.

The weather has been a lot better and brought more people out. Economic state means more UK holidays rather than abroad.

Down to more confidence financially from people in general - more coming out and spending money. We’ve also been fortunate by getting some very nice reviews in the last few months.
Negative verbatim comments on business performance: Accommodation

"We haven't had as many enquiries, particularly from abroad like Australia & New Zealand.

We had less bookings because of the World Cup.

I think the storms in February had a big impact and the economy - a lot of people are still short of money which is having a negative impact.

Wet weather and rain has had a bad effect on business.

We are not very well known in the community at the minute, which is affecting our trade throughout this year.

The bad weather shut the railway line down, so I had cancellations."
Case Study: The Foxhunter Park

As a luxury, 5 star, caravan park we have continued to make improvements to our offering to ensure the highest standards. We have recently completed a new bar area, and have a new development in the pipeworks which should expand our capacity further.

We are active on social media, as well as marketing the park through newspapers and magazines. Furthermore, we have recently got Hoseasons to do our bookings which has given us a wider scope and should make the process easier for guests.

Although we are a big site, we are a family-run business and this is reflected in how we manage the park, which I think guests really appreciate. During the peak summer period we have an extensive schedule of entertainment for guests of all ages.

We listen to all feedback and make changes accordingly, which allows us to really deliver what guests want, which is really shown through the customer testimonials on our website.

Increase in visitor numbers of 11-20% for the year-to-date compared with the same period in 2013.

This luxury caravan park offers a beautiful environment for holiday makers and continues to improve its offer to stay ahead of the market.

- Luxury 5 star caravan park
- Situated in Monkton, Kent
Future Performance
Advance booking levels: Accommodation

Advance booking levels are as buoyant as they were in April this year which, discounting pre-summer periods, is better than at any other point recorded.

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

Advance bookings are down amongst all business types except hotels, but have improved on this time last year, and confidence for the forthcoming period remains high.
Confidence and advance bookings are better for the forthcoming period than at this same time last year, regardless of size of business. Smaller businesses continue to steadily increase in confidence as the year goes on.

**CONFIDENCE: For period up until the end of October**

- **% Very confident**
  - Up to 10 bedspaces
  - 11-100 bedspaces
  - Over 100 bedspaces

**ADVANCE BOOKINGS**

- **% Very/ fairly good**
  - Up to 10 bedspaces
  - 11-100 bedspaces
  - Over 100 bedspaces

VisitEngland
Confidence for forthcoming period: By location

Seaside businesses are understandably slightly less confident, now the summer has passed, with advanced booking levels looking slightly less positive and a higher risk of inclement weather. However, both confidence and advance booking levels are improved on this time last year across all businesses locations.

CONFIDENCE: For period up until the end of October

% Very confident

ADVANCE BOOKINGS

% Very/ fairly good
Very positive, a lot of conference and events booked and repeat business, which will give a high occupancy of rooms and have a positive impact on the business.

I'm confident because we've had a good year, we have good staff and London is always busy with tourists.

Our business is growing and we are gaining more customers both locally and further afield.

Positive – there are a few events coming up, so the area should be busy as there are things attracting visitors into town.
Out of season time affects us, being a beach side resort.

Not many people coming to Blackpool, especially to stay overnight, people just staying the day and leaving.

There are too many others hotels around, and people are taking more holidays abroad.

Bookings are very slow at this time in the year, people are doing last minute bookings.

Footfall is not as it was and people don't have the money to spend.
Business optimism for 2014

With 61% of businesses saying they feel that 2014 will be better than 2013, optimism is at the highest level since before Jan ‘13.

%

- Much worse than 2013
- Slightly worse than 2013
- The same as 2013
- Slightly better than 2013
- Much better than 2013

With 61% of businesses saying they feel that 2014 will be better than 2013, optimism is at the highest level since before Jan ‘13.

%
Performance and confidence snapshot: September 2014

<table>
<thead>
<tr>
<th>Visitor Numbers (September)</th>
<th>Confidence (End of October)</th>
</tr>
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<tbody>
<tr>
<td>Up</td>
<td>Same</td>
</tr>
<tr>
<td>TOTAL (%)</td>
<td>55</td>
</tr>
<tr>
<td>Hotel</td>
<td>78</td>
</tr>
<tr>
<td>Guest / B&amp;B</td>
<td>54</td>
</tr>
<tr>
<td>Self catering</td>
<td>41</td>
</tr>
<tr>
<td>Caravan / camping</td>
<td>50</td>
</tr>
<tr>
<td>Up to 10</td>
<td>47</td>
</tr>
<tr>
<td>11-100</td>
<td>61</td>
</tr>
<tr>
<td>Over 100</td>
<td>53</td>
</tr>
<tr>
<td>5 star</td>
<td>41</td>
</tr>
<tr>
<td>4 star</td>
<td>57</td>
</tr>
<tr>
<td>1-3 star</td>
<td>54</td>
</tr>
<tr>
<td>Budget / other</td>
<td>56</td>
</tr>
<tr>
<td>Seaside</td>
<td>52</td>
</tr>
<tr>
<td>Large town / city</td>
<td>54</td>
</tr>
<tr>
<td>Small town</td>
<td>67</td>
</tr>
<tr>
<td>Rural</td>
<td>54</td>
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