

Visit Norfolk
Tourism Business Confidence Monitor

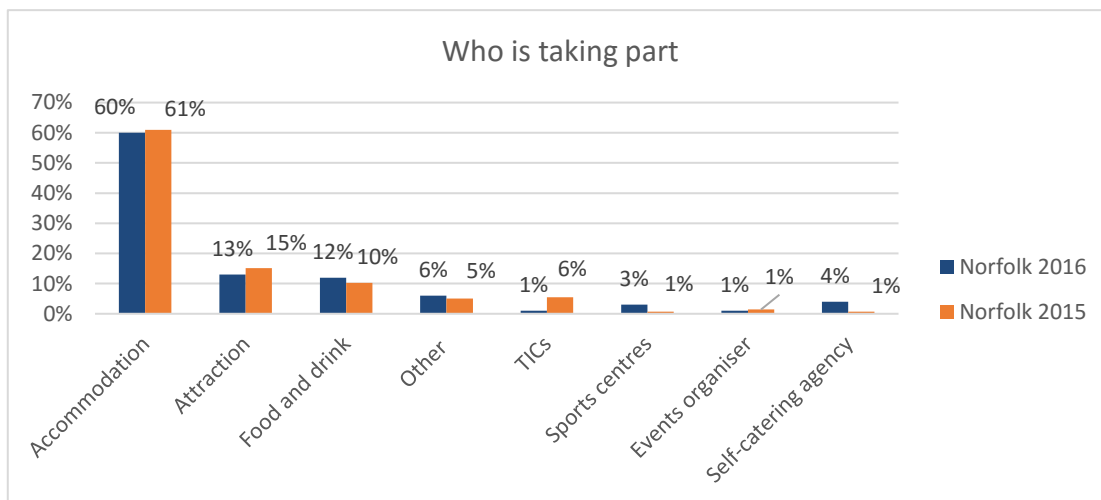


September 2016

Welcome

This business confidence monitor aims to provide the Norfolk tourism sector with an indication of recent business performance and the levels of confidence for the year. The sample size for this report is 184 businesses.

The results are based on an online survey conducted during August 2016. The survey was run concurrently with surveys for Visit Suffolk and Visit Essex as well as a nation-wide survey conducted by Visit England. The combined regional sample for the three surveys is 399 businesses. Results for England are based on a sample of 1199 responses. This report covers performance over School Summer Holidays period and measures confidence levels for the period up to the October Half Term.



Summary

This edition covers recent performance over the Summer Holidays period and measures confidence levels for the period up to October Half Term.

Looking at year on year comparisons, a smaller proportion of respondents were 'very satisfied' (46% in 2016 compared to 51% in 2015) with their recent performance. The proportion of respondents 'Quite satisfied' with their performance over Summer 2016 was slightly higher than in 2015 (41% this year compared to 39% last year).

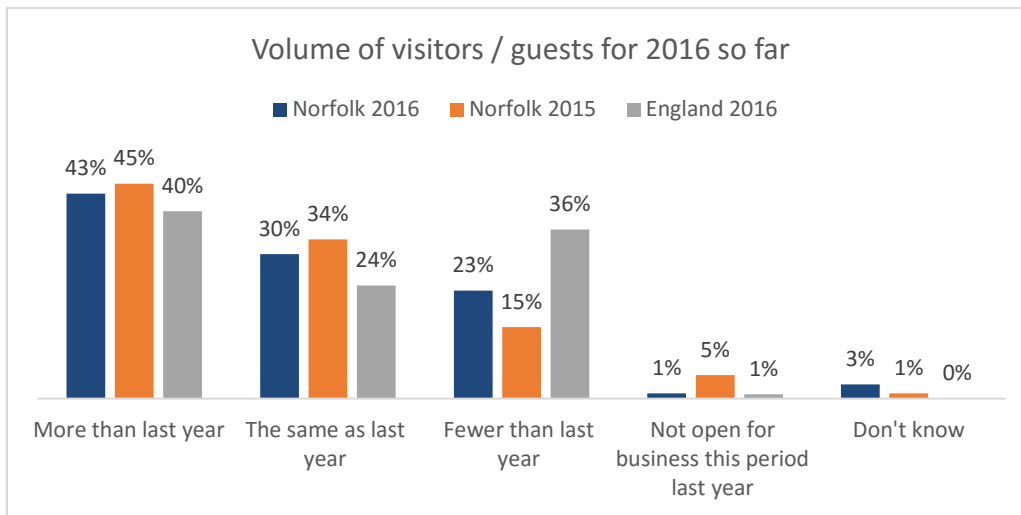
Almost three quarters (71%) indicated that booking levels for this year are 'good' (45%) or 'very good' (26%). Just under a quarter (22%) feel booking levels are 'just OK' for the time of year.

The results for the survey show that 41% expect to perform 'a little better than last year' and a further 18% believe business will be 'much better' than in 2015. These results are slightly below the confidence levels experienced in 2015 and the national average.



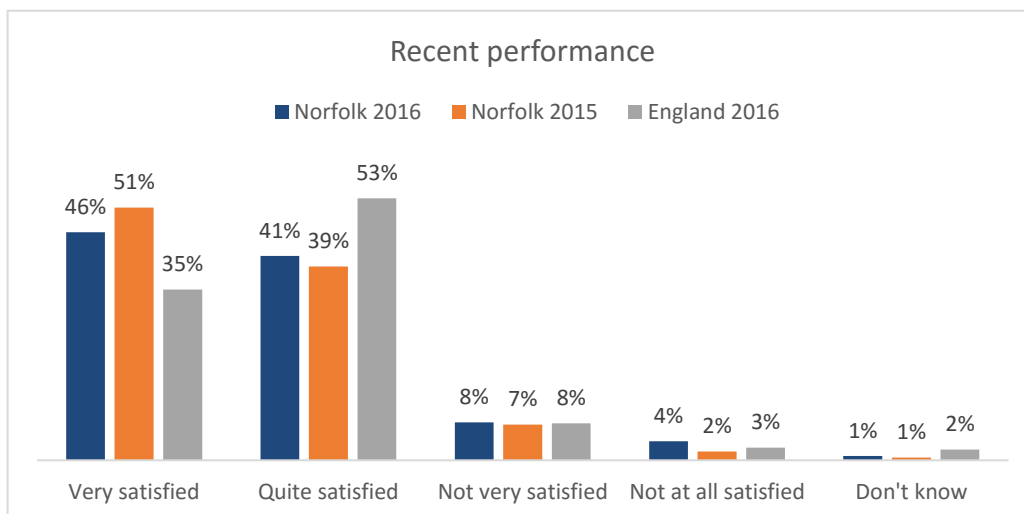
Business Performance

Participants were asked to assess their performance during the summer holiday season. Over two fifths (43%) reported an increase in the volume of visitors / guests compared to the same period the previous year. A further 30% attracted 'the same volume of visitors' than in 2015. These results are very slightly below the volumes achieved in 2015, when 45% saw an increase in visitor numbers compared to the previous year. However, they are slightly above the national average.



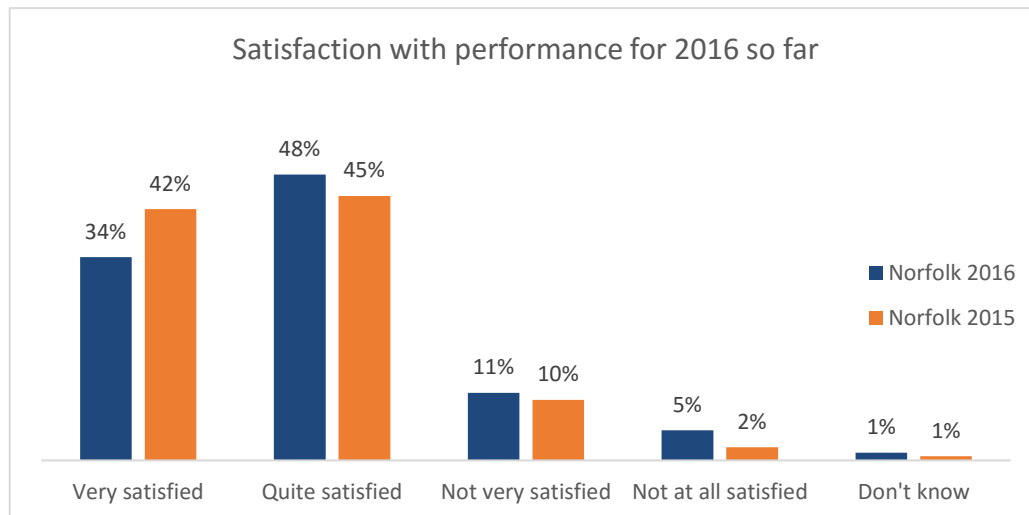
2016 overview

Looking at year on year comparisons, a smaller proportion of respondents were 'very satisfied' (46% in 2016 compared to 51% in 2015) with their recent performance. The proportion of respondents 'Quite satisfied' with their performance over Summer 2016 was slightly higher than in 2015 (41% this year compared to 39% last year). Satisfaction levels are higher than the national average.



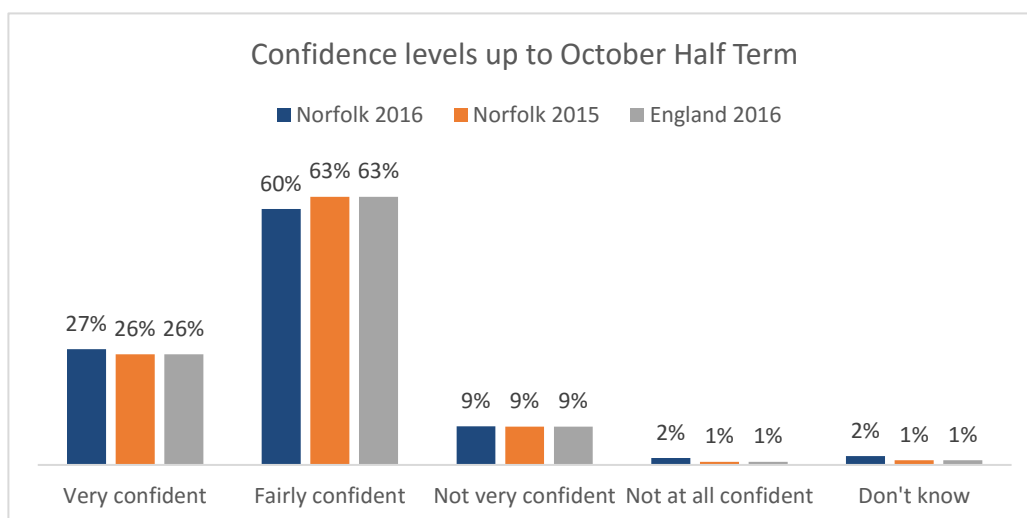
2016 overview

Looking at 2016 so far (January to August) about four fifths (82%) were either 'very satisfied' (34%) or 'quite satisfied' (48%) with performance to date. However, this is lower than in 2015 when 87% of businesses said they were either 'very satisfied' (42%) or 'quite satisfied' (45%). 11% said they were 'not very satisfied' with their performance this year.



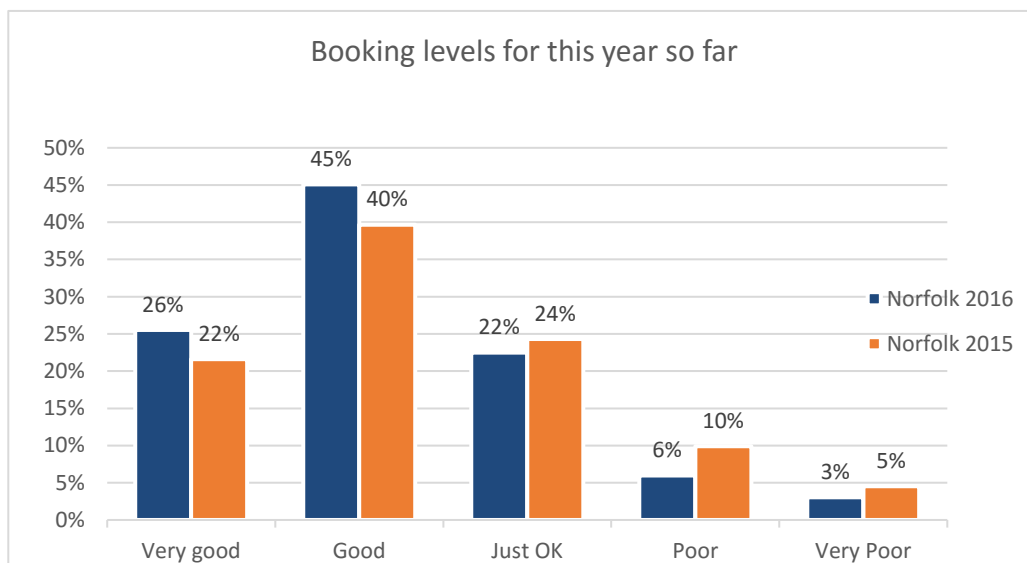
Confidence levels

Optimism is strong and similar to the levels achieved last year and the national average. Only 9% of businesses are not very confident about their performance until October Half Term.



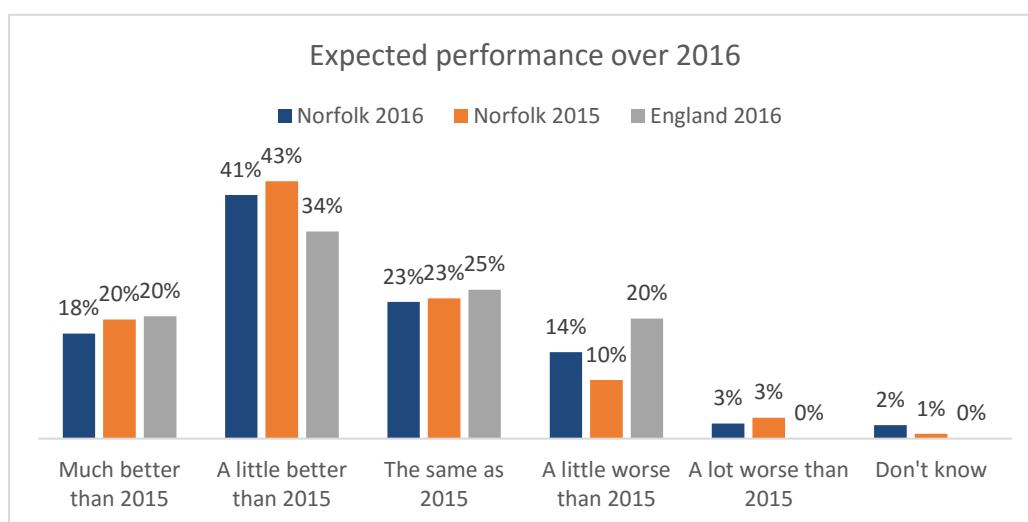
Confidence levels

Advance booking levels among accommodation establishments are higher than they were this time last year. Almost three quarters (71%) indicated that booking levels for this year are 'good' (45%) or 'very good' (26%). Just under a quarter (22%) feel booking levels are 'just OK' for the time of year.



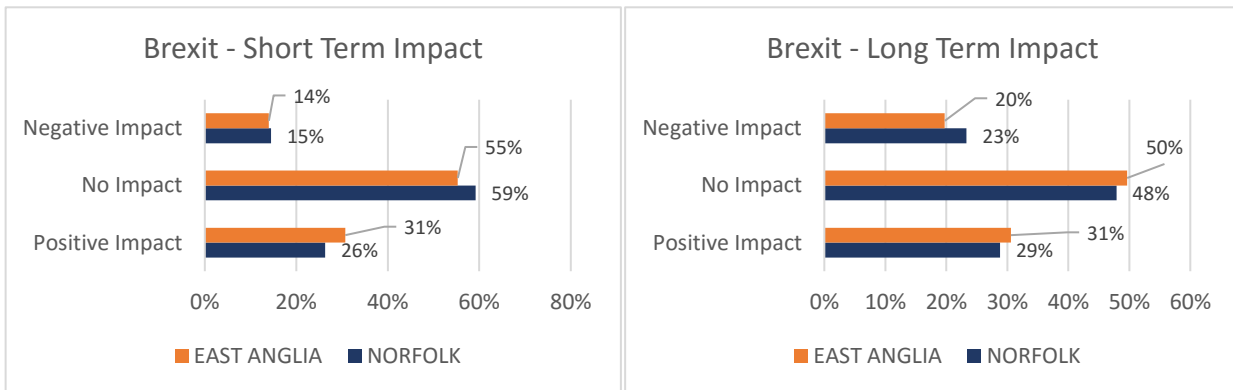
2016 overall expected performance

Despite the challenging start of the year and the early Easter, expectations for 2016 as a whole are high, although not at 2015 levels. 41% expect to perform 'a little better than last year' and a further 18% believe business will be 'much better' than in 2015. These results are slightly below the confidence levels experienced in 2015 and the national average.



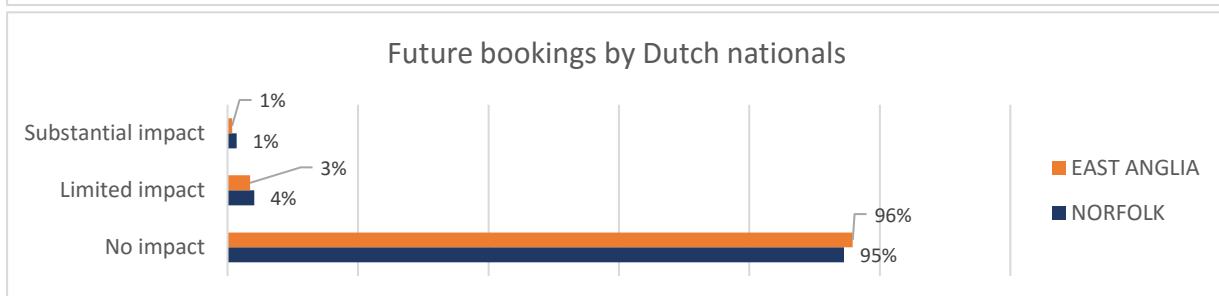
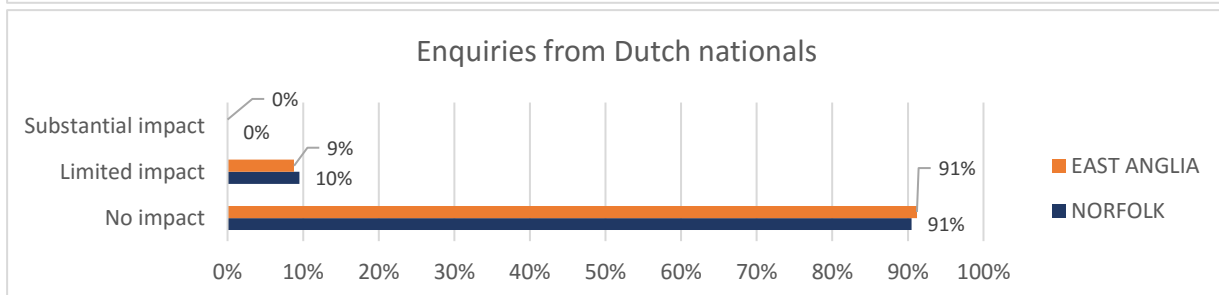
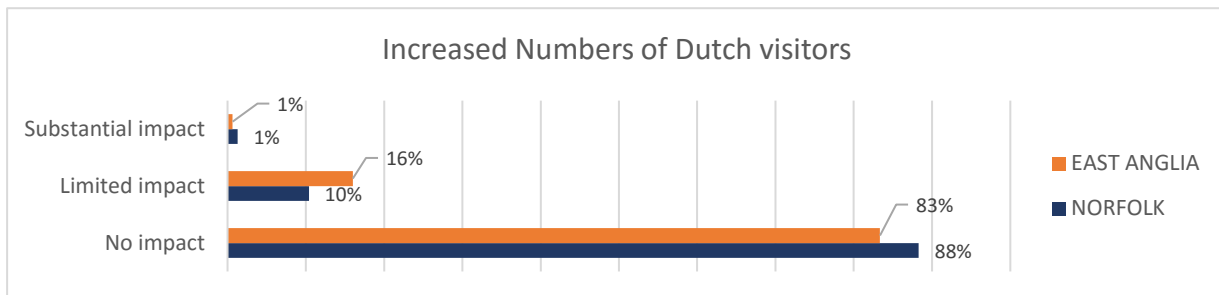
EU Referendum

Following the EU membership referendum in June 2016, the UK voted to leave the EU. Respondents were asked to assess the short and long term impacts of that decision. On average over half of all Norfolk business believe that Brexit will have no impact on their performance. However, the proportion of those who believe there will be a negative impact on both the short and long terms is slightly above the East Anglia average.



Duth market

Visit East Anglia conducted an overseas promotion campaign to attract more Dutch visitors to the region. Businesses were asked to assess the impact that the campaign had on their business in terms of increased number of visits, enquiries and bookings from Dutch nationals. The survey shows that Norfolk has so far received less visits from Dutch nationals (compared to East Anglia) but a higher number of enquires and slightly more bookings.



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