

Visit Norfolk
Tourism Business Confidence Monitor

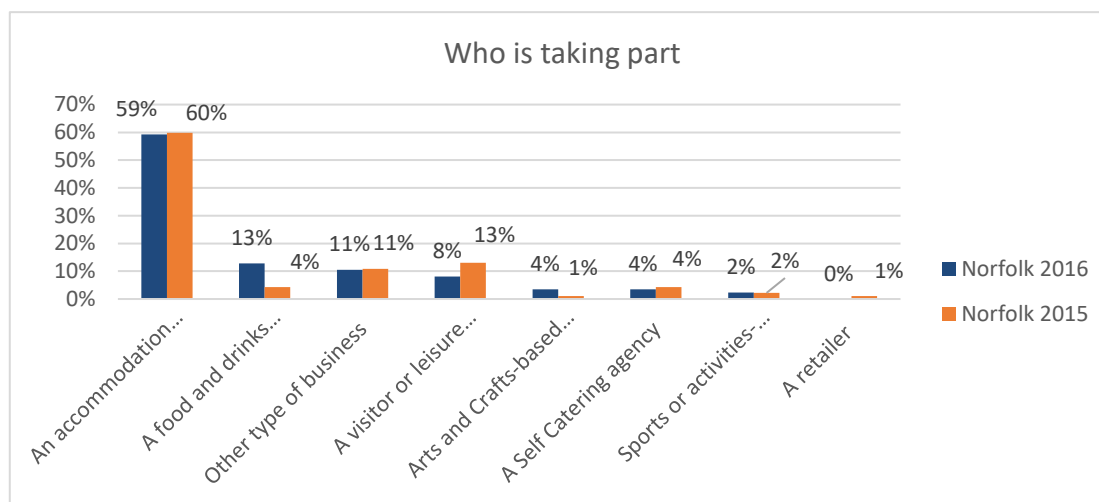


December 2016

Welcome

This business confidence monitor aims to provide the Norfolk tourism sector with an indication of recent business performance and the level of confidence amongst businesses. Destination Research is commissioned by Visit Norfolk to conduct the survey, collate the results and publish this report. The sample size for this report is 196 businesses.

The results are based on an online survey conducted during November 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 412 businesses. This report covers performance from October Half Term and measures confidence levels for 2016 as a whole.



Summary

This edition covers performance from October Half Term and measures confidence levels for 2016 as a whole.

Over two fifths (41%) reported an increase in the volume of visitors / guests since October Half Term, compared to the same period the previous year.

Looking at year on year comparisons, a slightly smaller proportion of respondents were 'very satisfied' (36%) with their recent performance, compared to 37% in 2015.

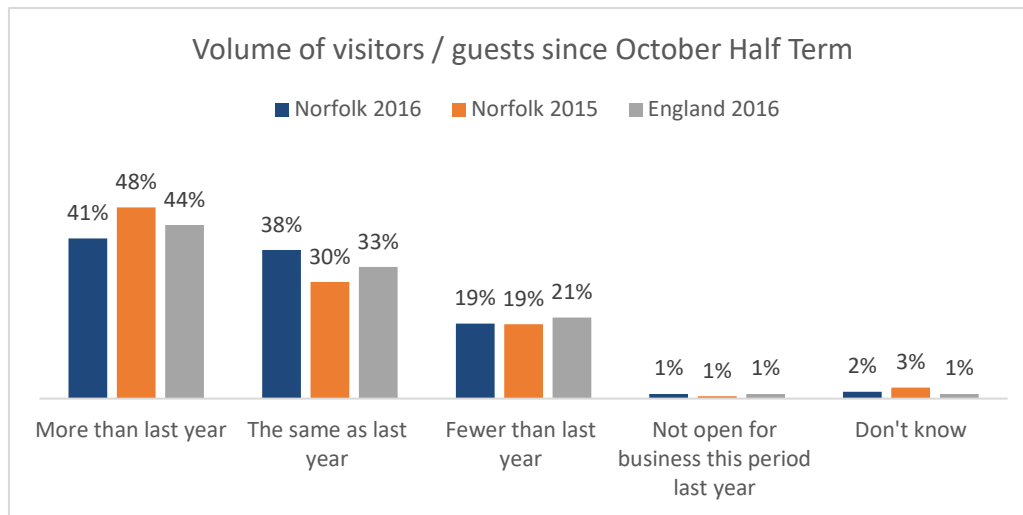
Almost three quarters (71%) indicated that booking levels for this time of the year are 'good' (45%) or 'very good' (26%). Just under a quarter (22%) feel booking levels are 'just OK' for the time of year.

Participants were asked to assess their performance for 2016 as a whole. Despite the challenging start of the year and the early Easter, over half (56%) rated their 2016 perform as better than 2015.

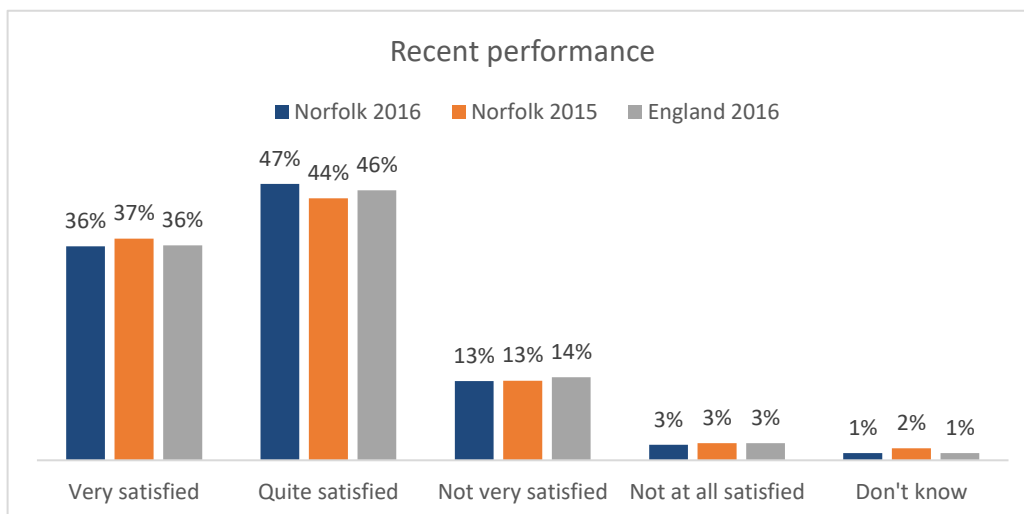


Recent performance

Participants were asked to assess their performance since October Half Term. Two in five businesses (41%) reported an increase in the volume of visitors / guests compared to the same period the previous year. A further 38% attracted 'the same volume of visitors' than in 2015. These results are slightly below the volumes achieved in 2015, when 48% saw an increase in visitor numbers compared to the previous year. However, they are slightly above the national average.

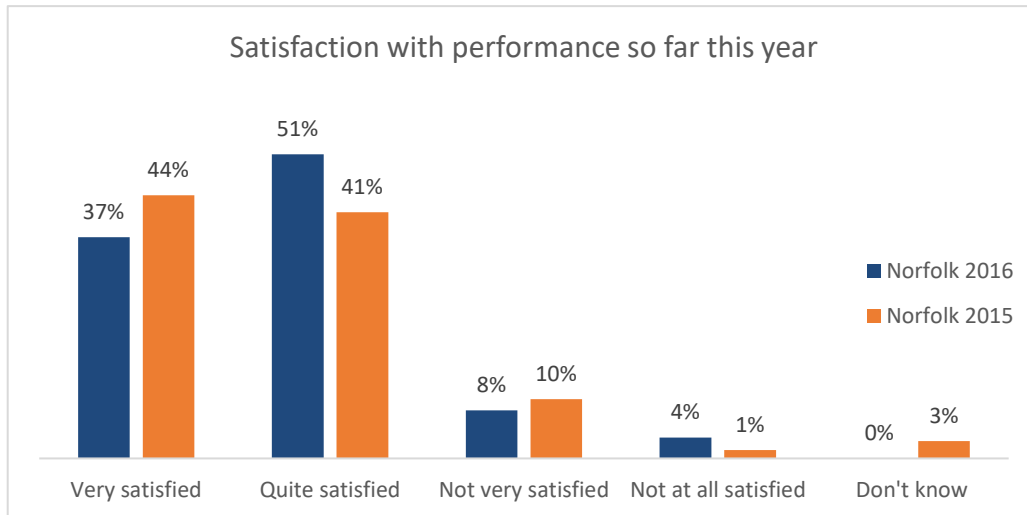


Looking at year on year comparisons, a slightly smaller proportion of respondents were 'very satisfied' (36%) with their recent performance during 2016, compared to 37% in 2015. The proportion of respondents 'Quite satisfied' with their performance over October Half Term was slightly higher than in 2015 (47% this year compared to 44% last year). Satisfaction levels are on a par with the national average.



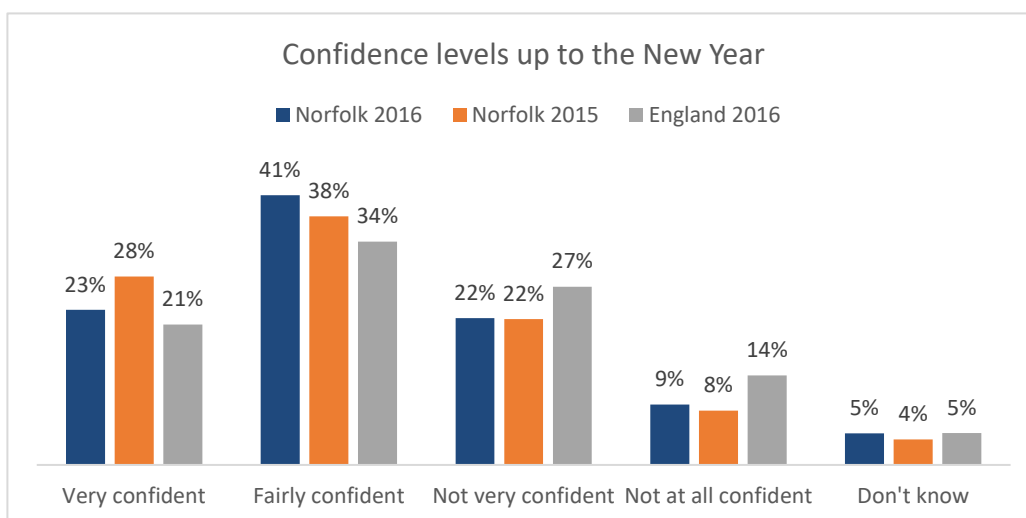
2016 overview

A first assessment of the 2016 performance shows that 88% of respondents were either 'very satisfied' (37%) or 'quite satisfied' (51%) with performance over 2016. This is slightly better than 2015 when 85% of businesses said they were either 'very satisfied' (37%) or 'quite satisfied' (44%). However, note that the proportion of businesses who were 'very satisfied' with their performance in 2015 is higher than in 2016.



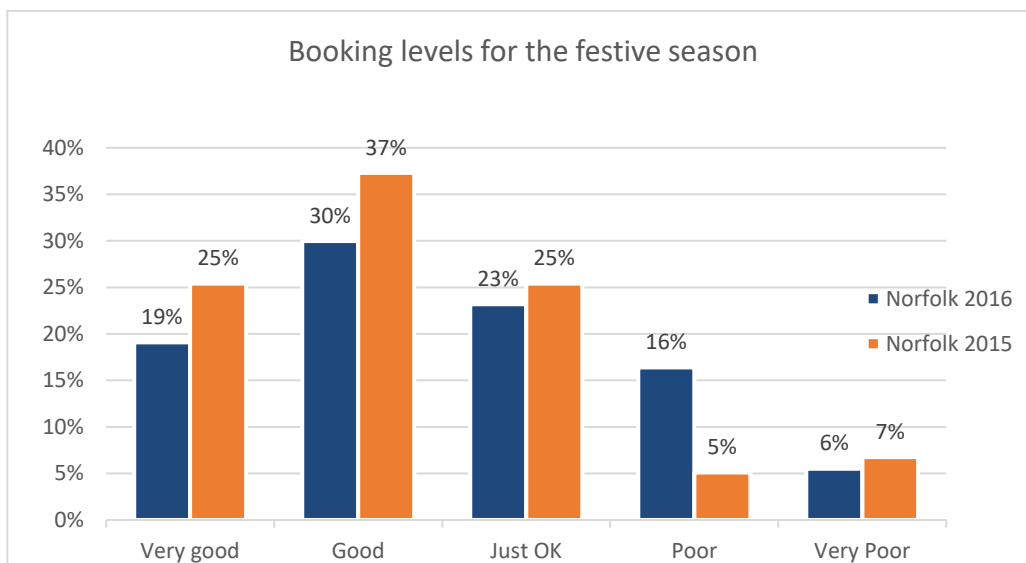
Confidence levels

Optimism is strong but slightly lower than the levels achieved last year. This is likely to be related to uncertainty generated by recent events, including the results of the Brexit vote.



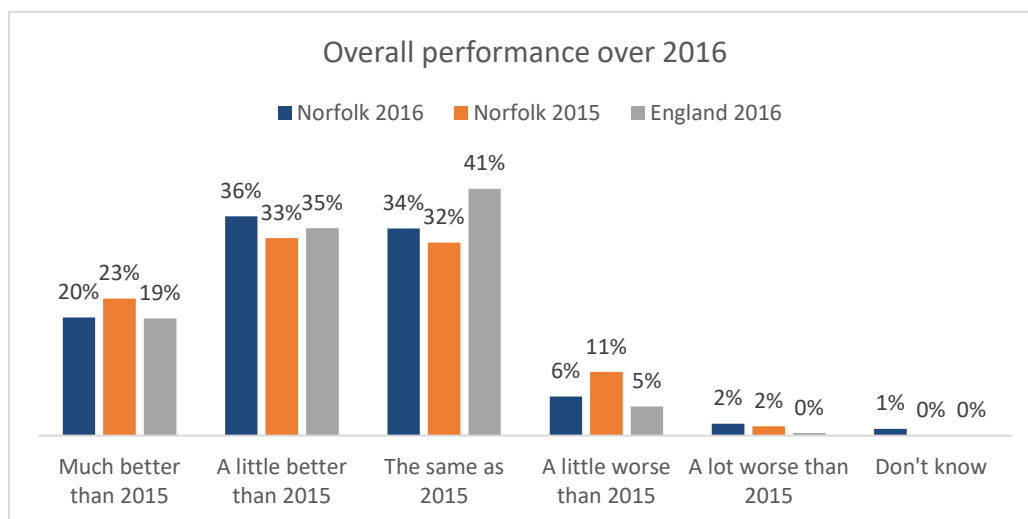
Christmas and New Year

Advance booking levels among accommodation establishments are lower than they were this time last year. Almost half (49%) reported booking levels for this year to be 'good' (30%) or 'very good' (19%). Just under a quarter (23%) feel booking levels are 'just OK' for the time of year. However, almost a quarter stated their bookings for the festive season were 'poor' (16%) or 'very poor' (6%).



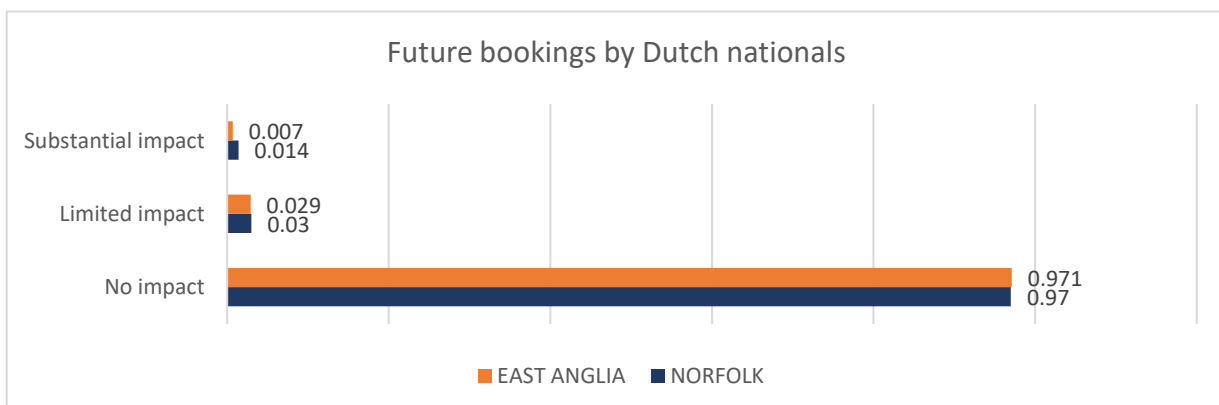
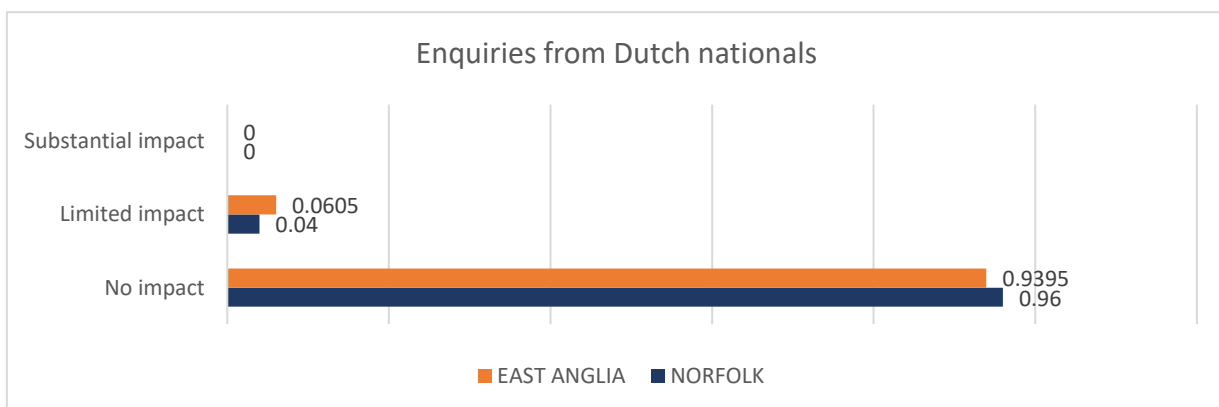
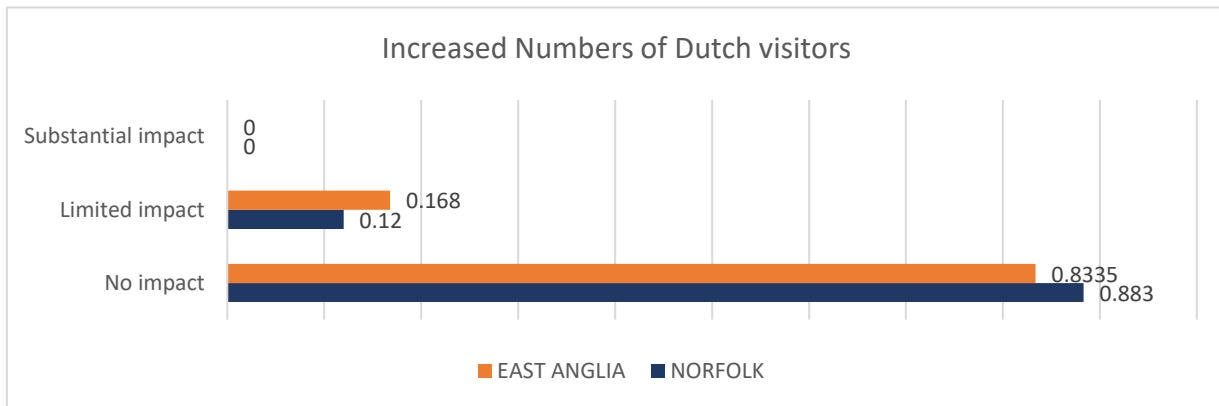
2016 overall performance

Participants were asked to assess their performance for 2016 as a whole. Despite the challenging start of the year and the early Easter, over half (56%) rated their 2016 perform as better than 2015. These results are very similar to the assessment made at the end of 2015. However, at the time 11% said their performance had been 'a little worse' than the previous year for 6% this year.



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 a slightly lower number of visits and enquiries from Dutch nationals (compared to East Anglia as a whole) and the same number of bookings.



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