

Visit Norfolk
Tourism Business Confidence Monitor

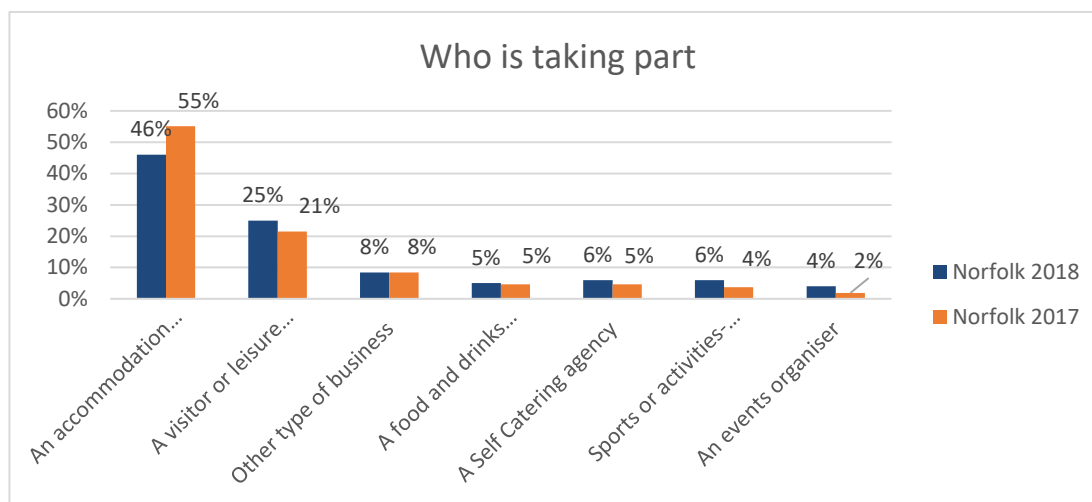


September 2018

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 135 businesses.

The results are based on an online survey conducted during August 2018. 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 299 businesses. This report covers performance from the Summer months and measures confidence levels up to October Half Term.



Summary

95%

are satisfied with their performance during the summer months

65%

report an increase in the volume of visitors compared to previous year

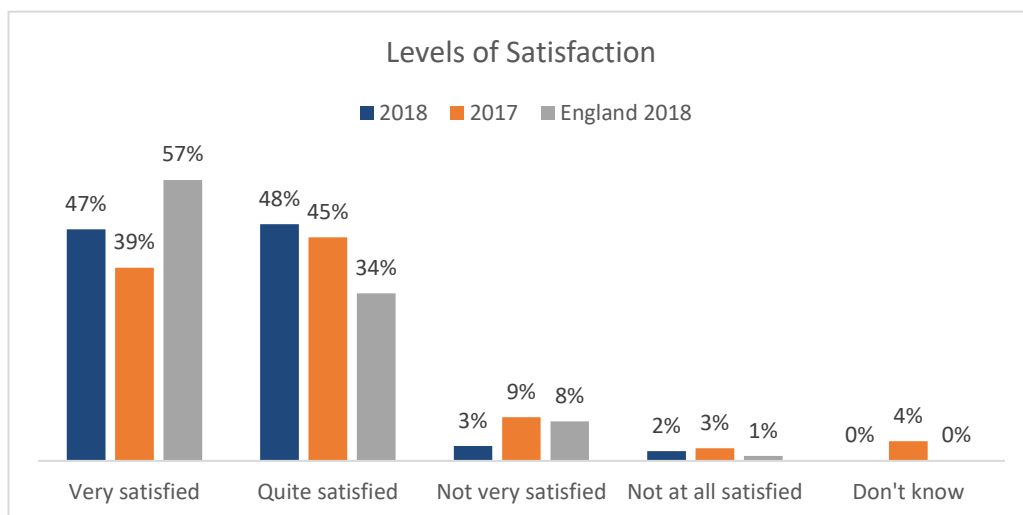
89% are positive about the immediate future, 81% report good levels of advanced

67% expect to generate growth this year and a further 15% expect to perform at



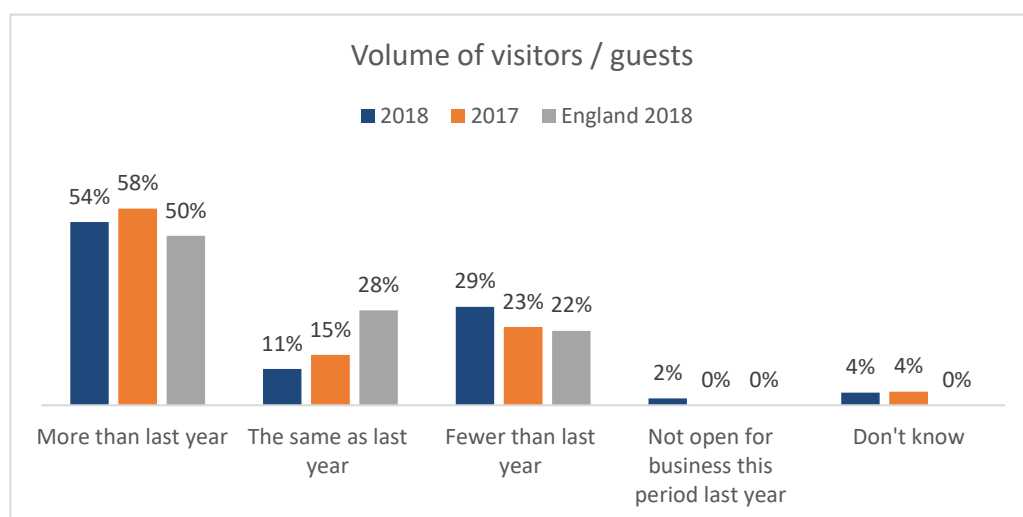
Recent Performance

Participants were asked to assess their performance during the summer months. Almost half (47%) were 'very satisfied' with their performance, up from 39% in 2017. The proportion of respondents 'Quite satisfied' with their performance was higher than in 2017 (48% this year compared to 45% last year). Satisfaction levels are level with the national average although the proportion of very satisfied businesses at national level is higher.



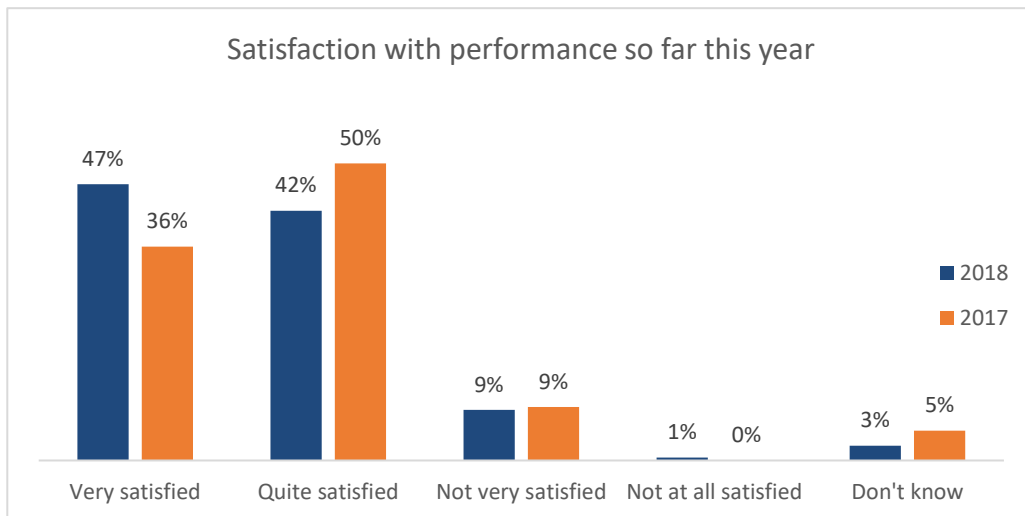
2018 So far

Participants were asked to assess their performance for 2018 so far. More than half (54%) reported an increase in the volume of visitors / guests compared to the previous year. A further 11% attracted 'the same volume of visitors' than in 2017. These results are slightly below than the volumes achieved in 2017 which would suggest that for some the good summer performance was not enough to compensate for the poor performance earlier in 2018 (primarily due to the cold weather).



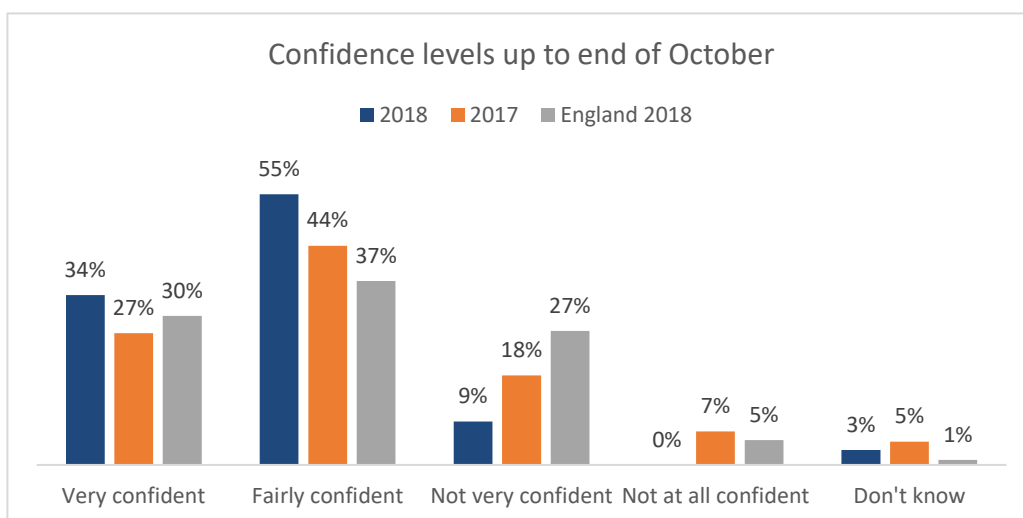
2018 So far

An assessment of the 2018 performance to-date shows that 89% of respondents were either 'very satisfied' (47%) or 'quite satisfied' (42%) with recent performance. This is above 2017, when 36% of businesses said they were 'very satisfied' and 50% 'quite satisfied'.



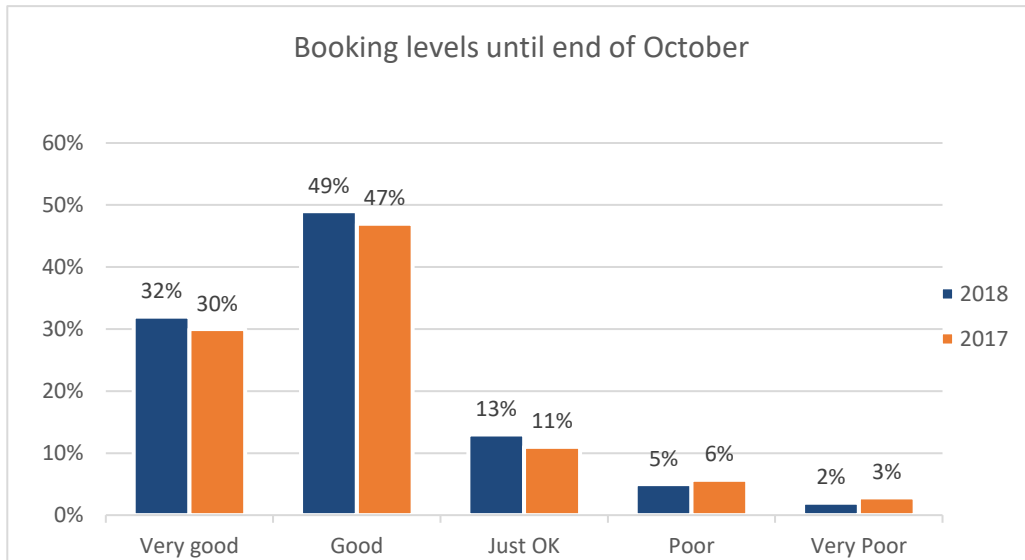
Summer to October Half Term Period - Confidence levels

Optimism is strong band significantly higher than the levels achieved last year. Norfolk is so far more optimistic about performance over the next few months than the national average.



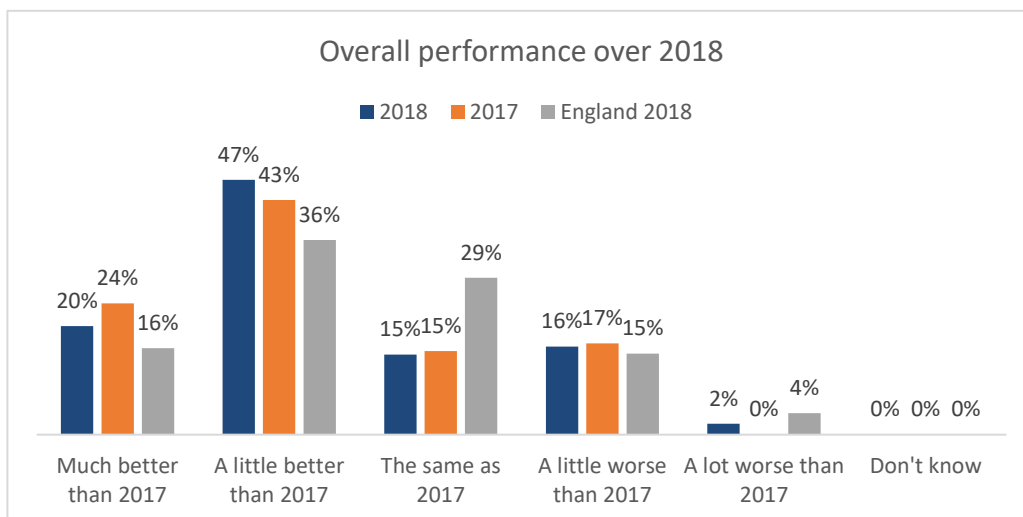
Summer to October Half Term Period - Booking Levels

Advance booking levels among accommodation establishments are slightly higher than they were this time last year. Four in five reported booking levels for this year to be 'good' (49%) or 'very good' (32%). Only 13% felt that booking levels to be 'just OK' for the time of year.



2018 - Overall Expectations

Participants were asked to assess their expected performance for 2018 as a whole. Just over two thirds (67%) expect to perform as better than in 2017. A further 15% expect to perform at the same level as in 2017. This assessment is more positive than the national average.



August Bank Holiday

Our topical question for this edition focussed on the performance over the August Bank Holiday weekend, based on a score of 0-10 where 0 means a very negative performance and 10 means an excellent performance.



East = Essex + Norfolk + Suffolk

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