



How's Business? SW Region

May 2010 data
South West Tourism and TNS

South West
England

southwesttourism 
The Regional Tourist Board for the South West of England

Introduction

South West Tourism work with TNS to produce '*How's Business?*' surveys on a monthly basis in order to provide a regular gauge of business levels in the South West region, allowing the identification of trends as they unfold, by asking about business compared to this time last year.

Businesses have advised us that this is particularly important information to have access to in these turbulent times, as it allows them to identify if they are losing or gaining market share and to change business plans and operations accordingly.

Participation in the survey is free and open to any tourism related business in the South West.

This document presents time-series data from the regional "*How's Business?*" Report at the SW Region specific level.

The regional reports are available on SWT's website at:

<http://www.swtourism.org.uk/documents/q/category/finance-facts-figures-documents/how-s-business-surveys/>

or

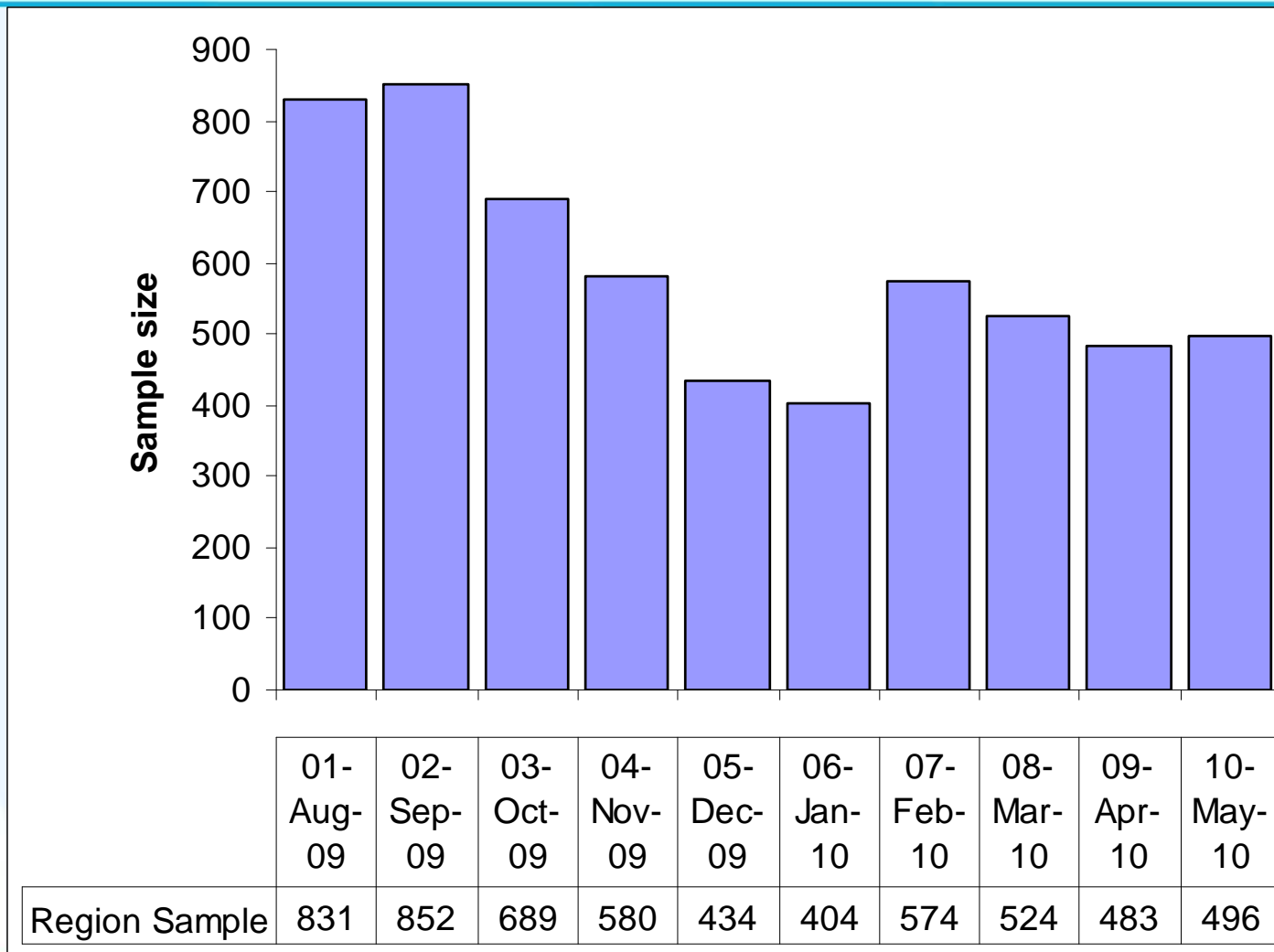
<http://tinyurl.com/3843vt2>

Nb "*Don't know*" responses are discounted from the results for comparability with the main reports.

Sample Profile.

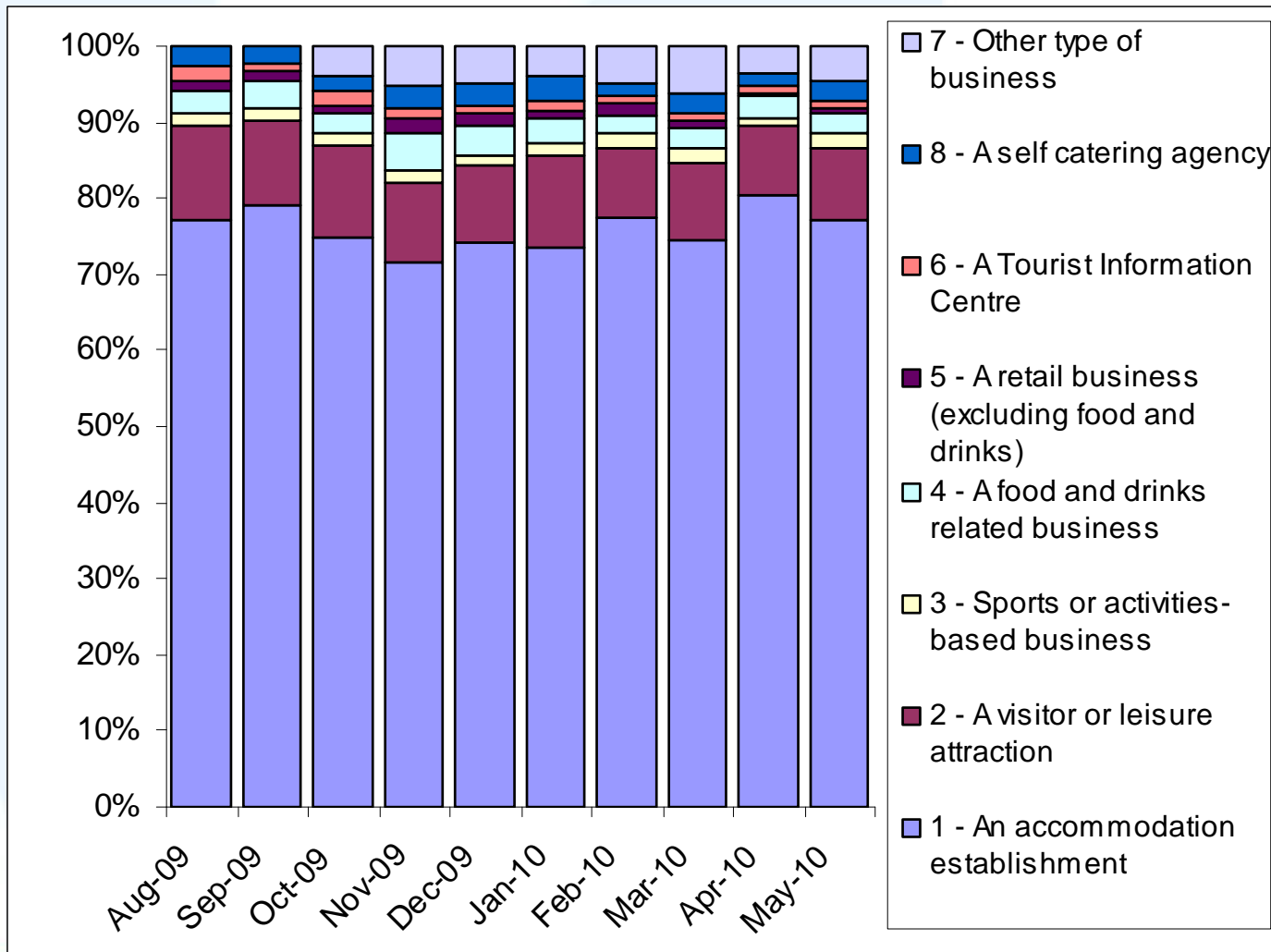
Sample Size for the SW region.

The bigger the sample size the more precise the figures.

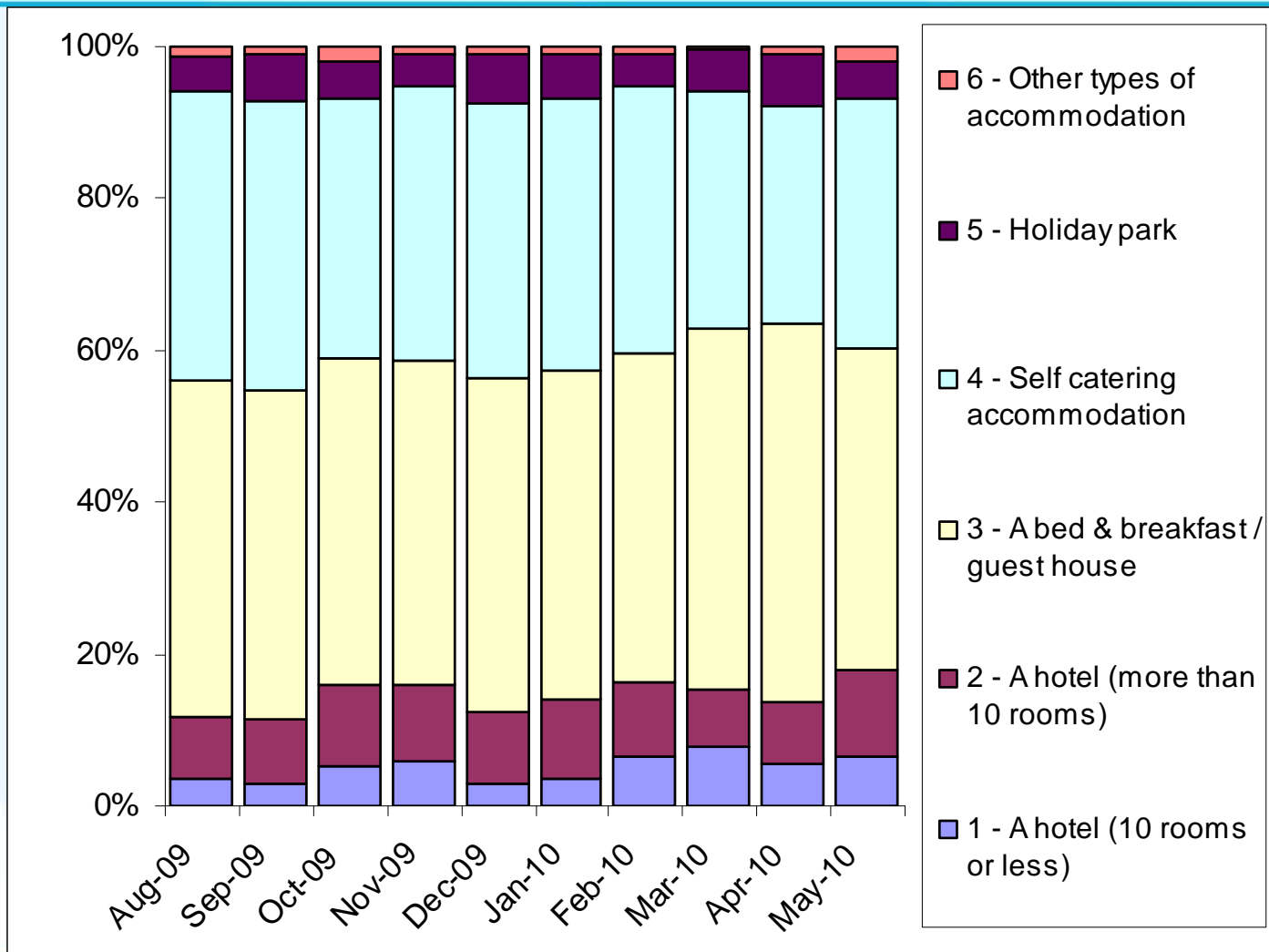


Respondent Profile – what types of businesses responded?

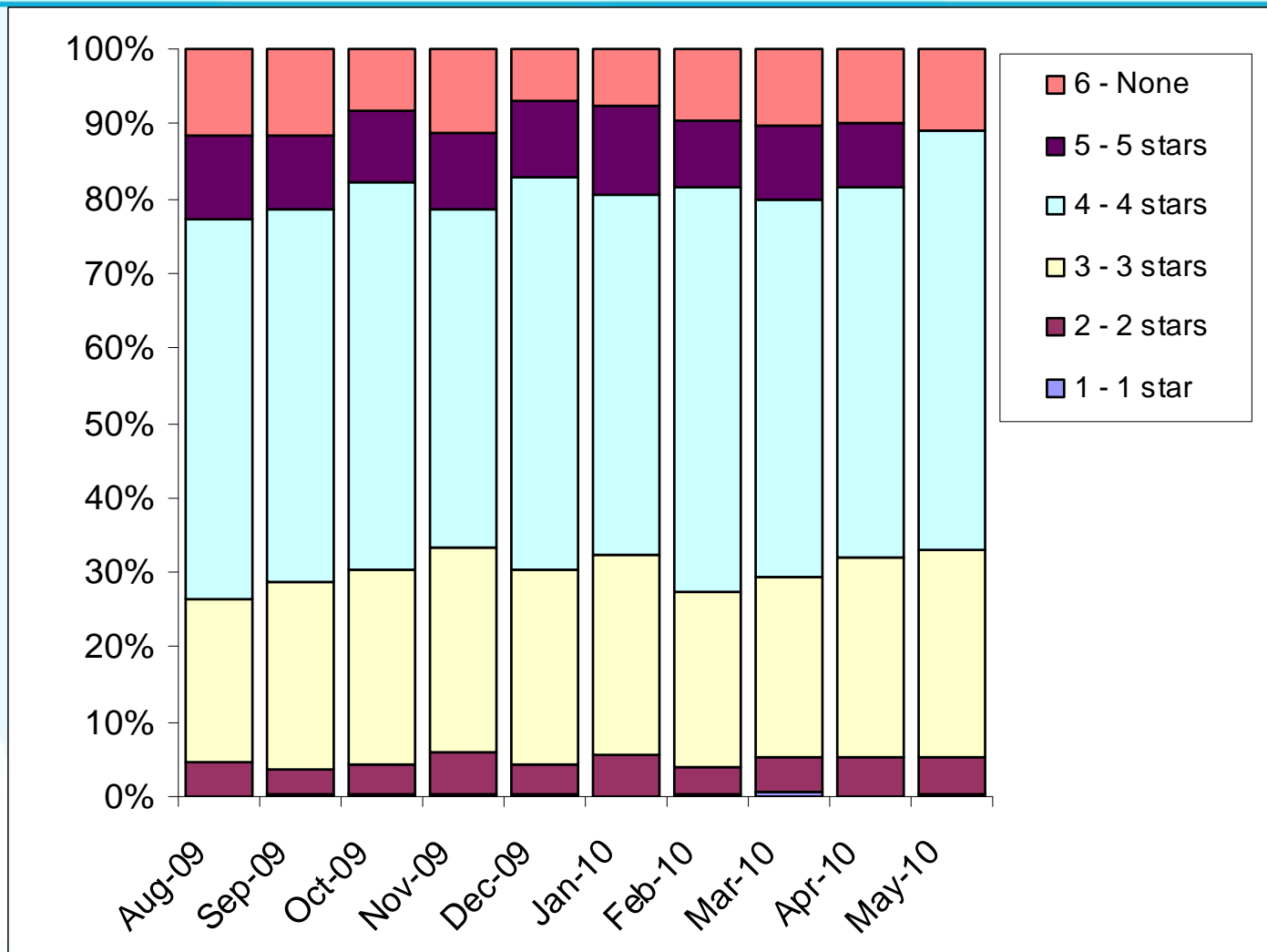
Percentage of business type in sample.



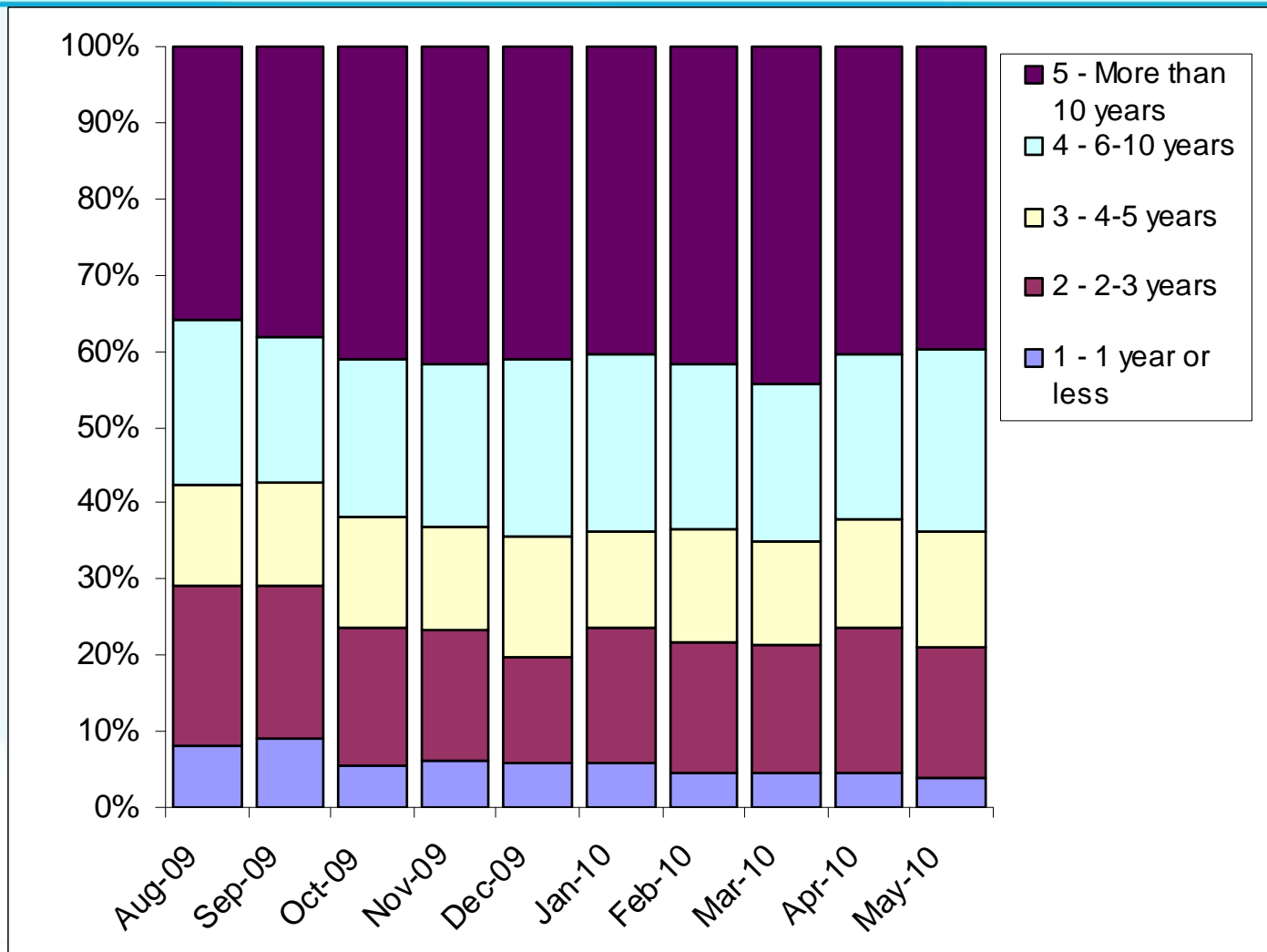
What was the composition of the accommodation businesses?



What rating were the accommodation providers?

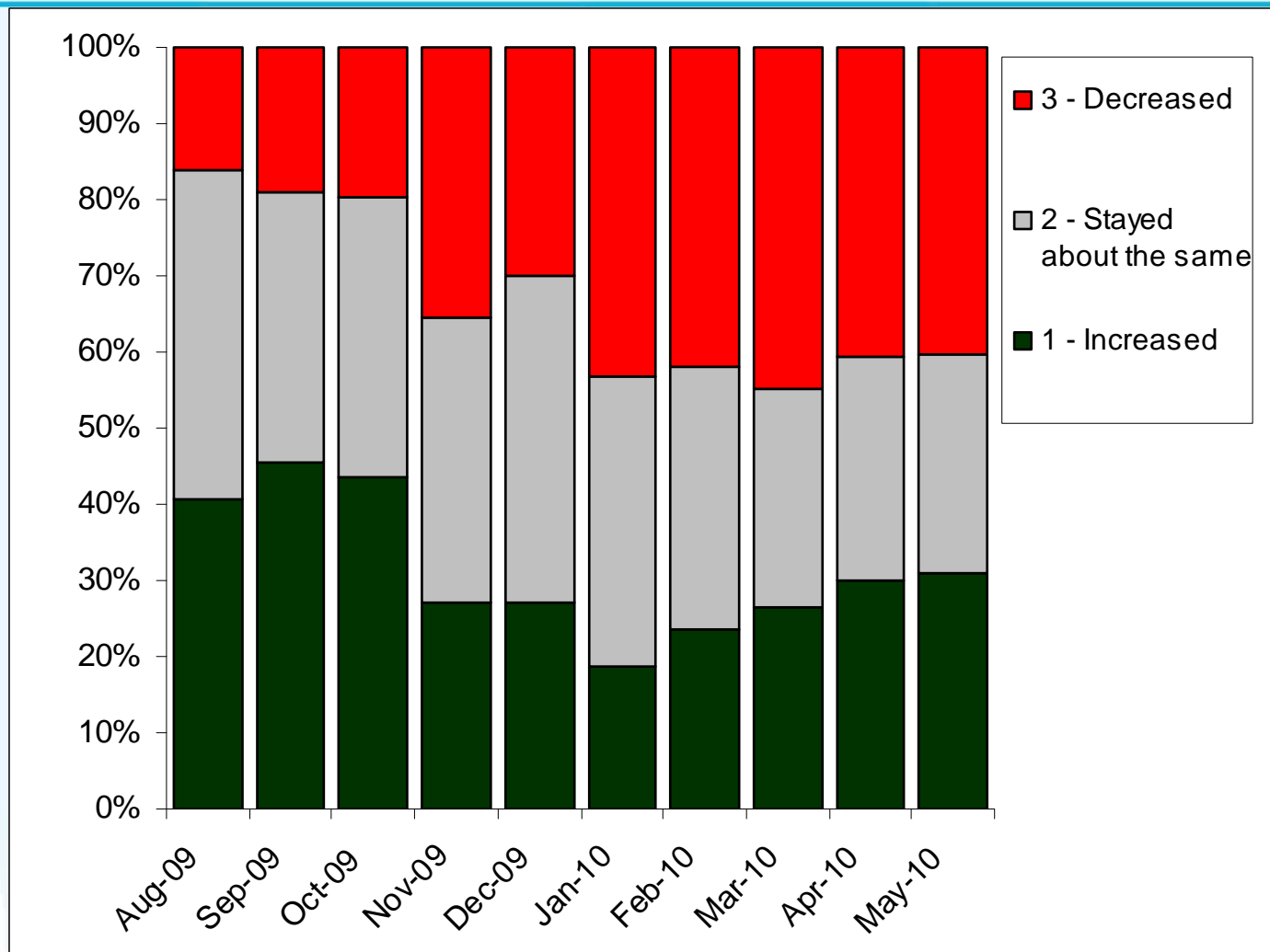


How long have all the businesses in the sample operated?

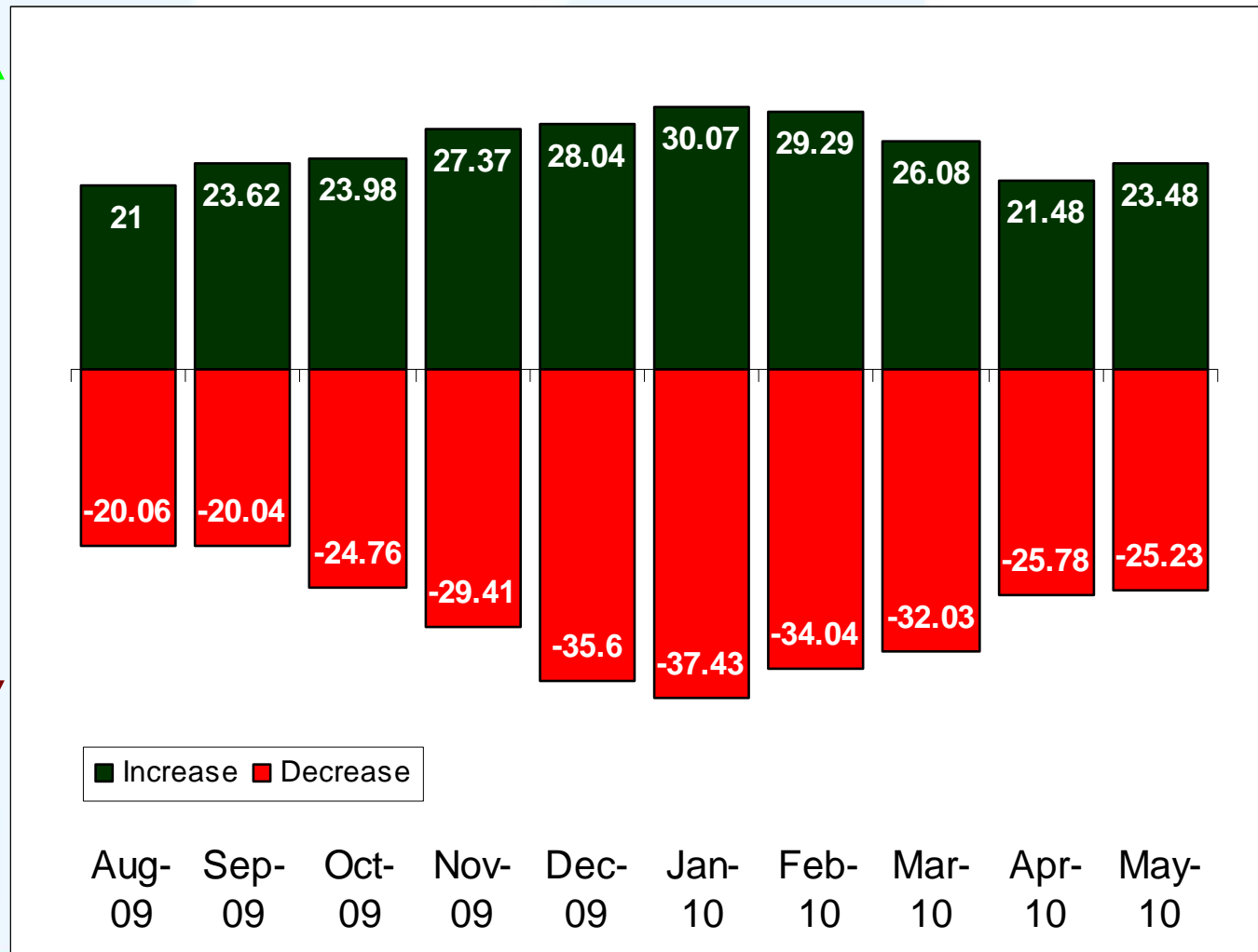


Business Performance - Number of Visitors.

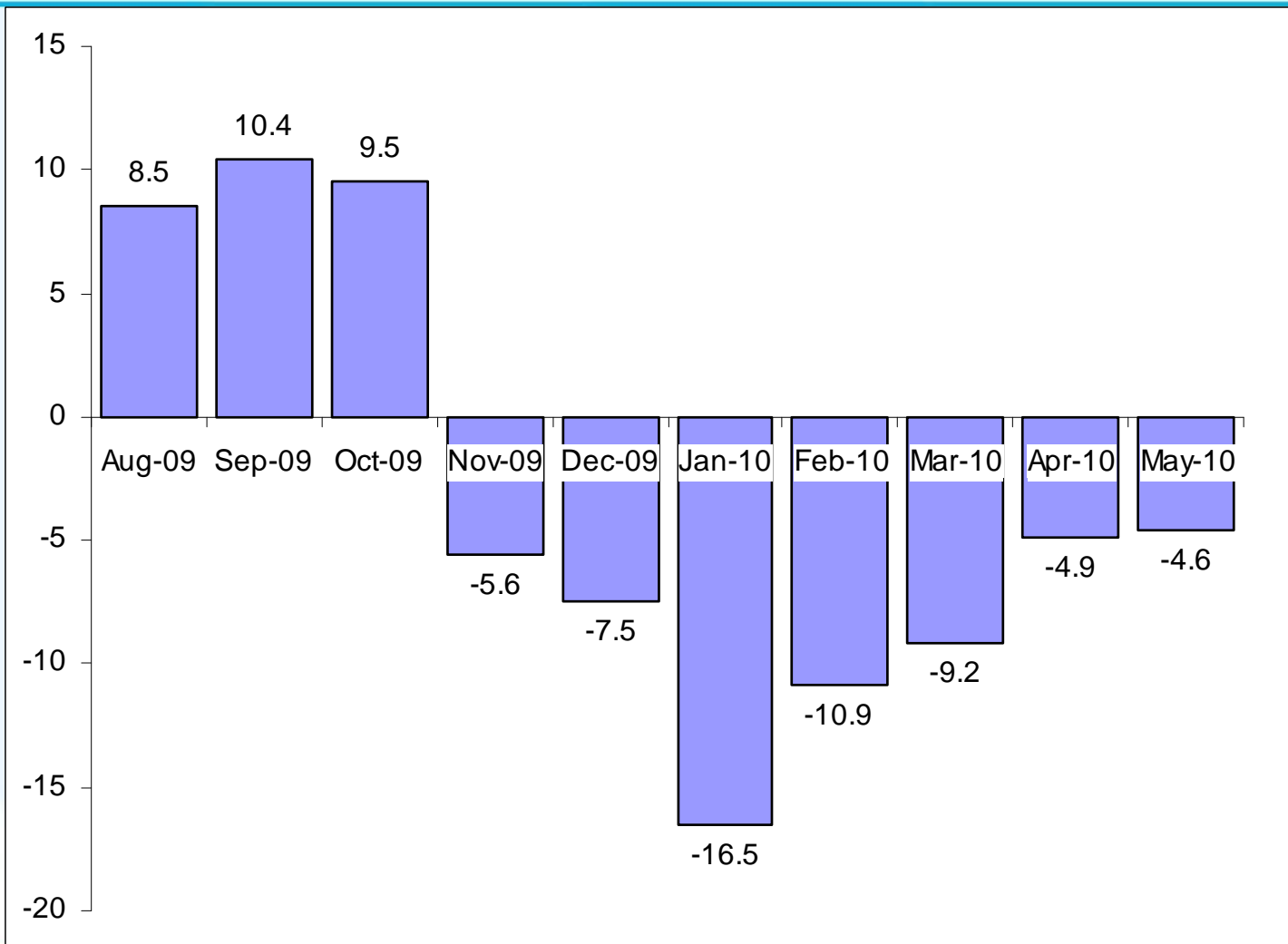
Businesses in the SW Region reported on their visitor numbers, comparing e.g. August 09 to August 08.



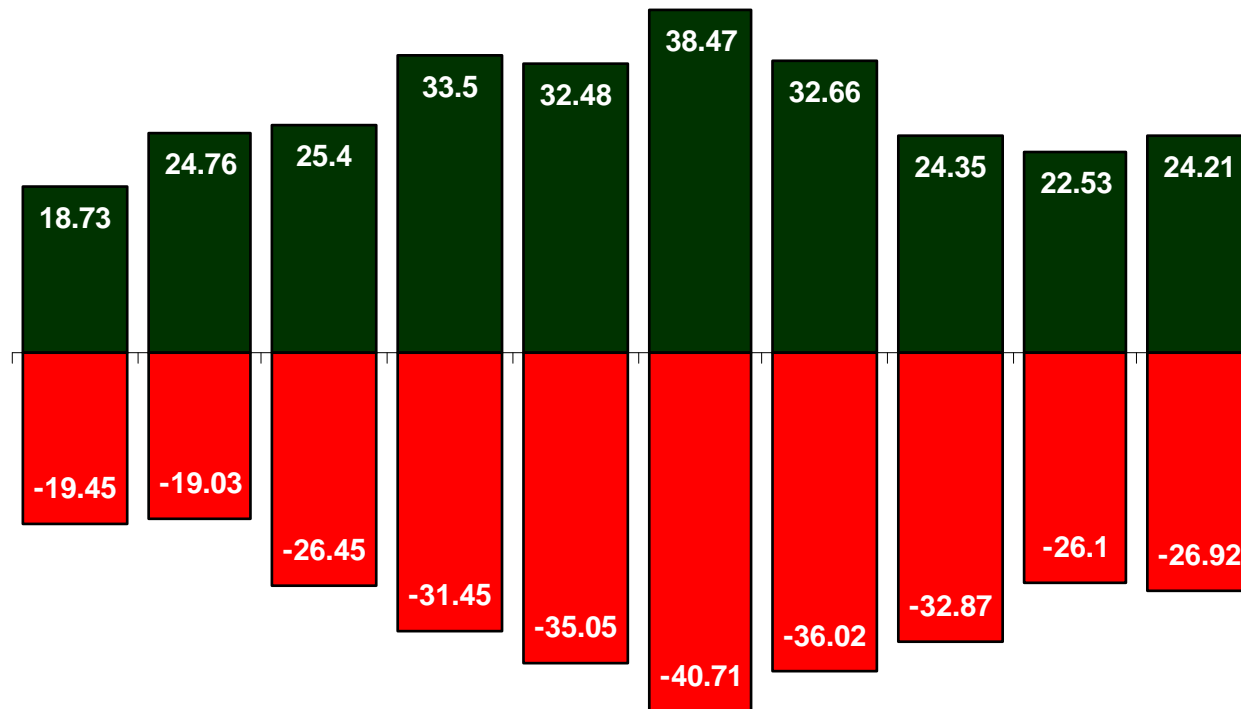
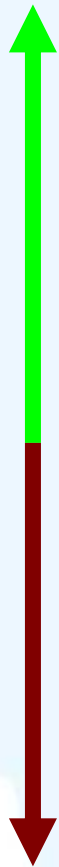
Businesses in the SW Region who provided a percentage increase or decrease in visitor numbers, these are the averages of those figures.



The actual percentage change in visitor numbers is shown for the SW Region.



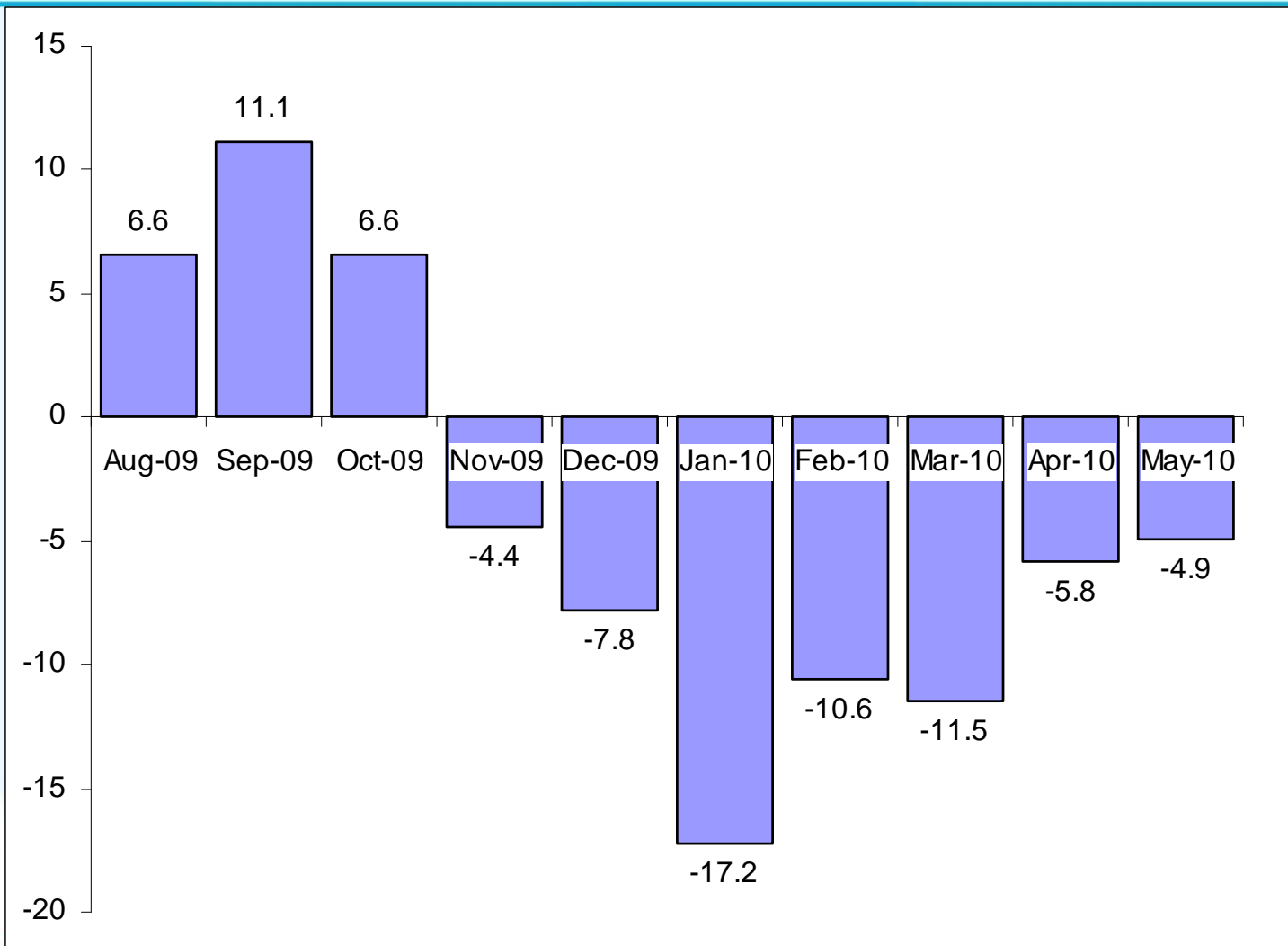
Accommodation businesses in the SW Region who provided a percentage increase or decrease in visitor numbers, these are the averages of those figures.



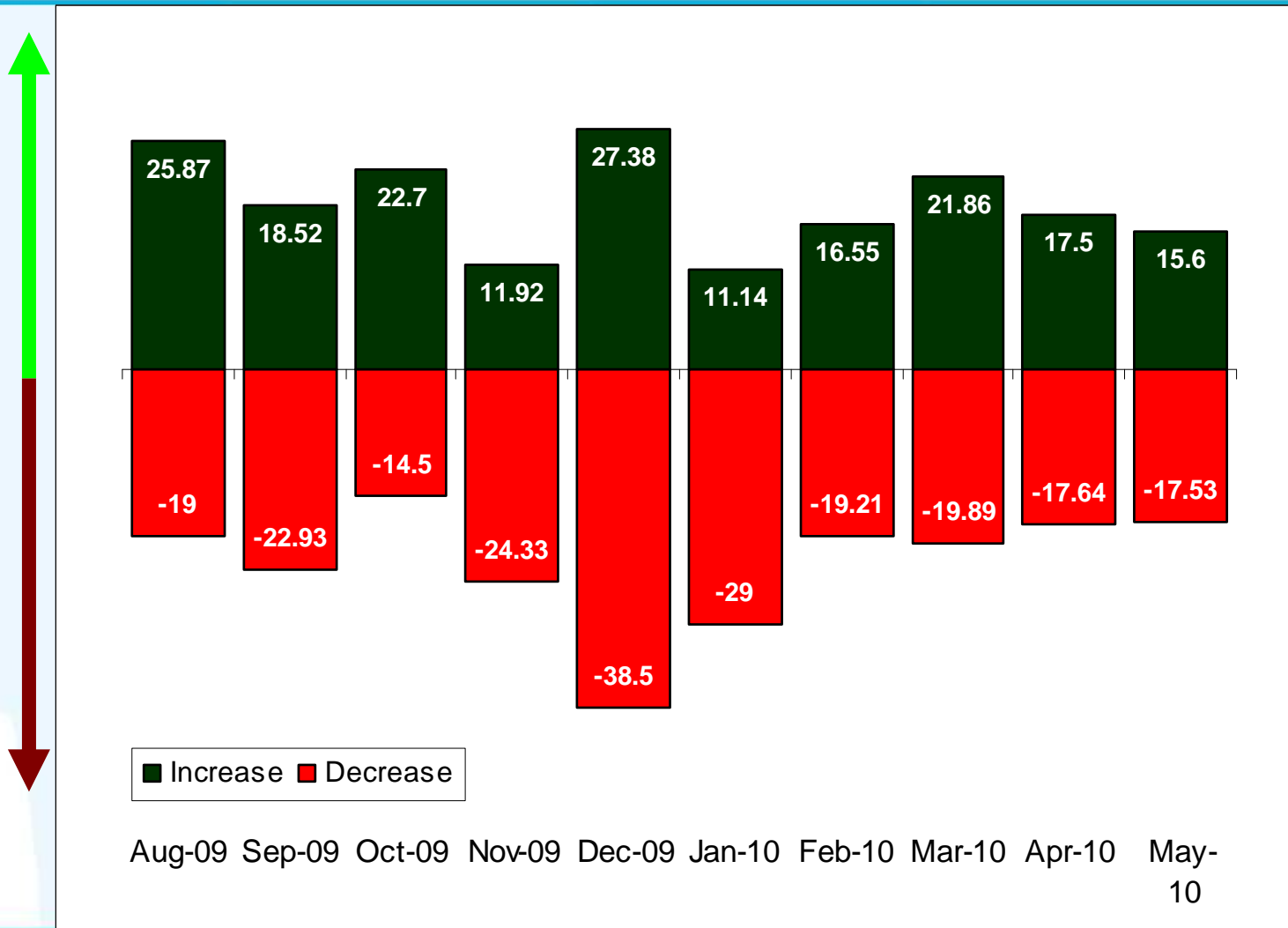
■ Increase ■ Decrease

Aug-09 Sep-09 Oct-09 Nov-09 Dec-09 Jan-10 Feb-10 Mar-10 Apr-10 May-10

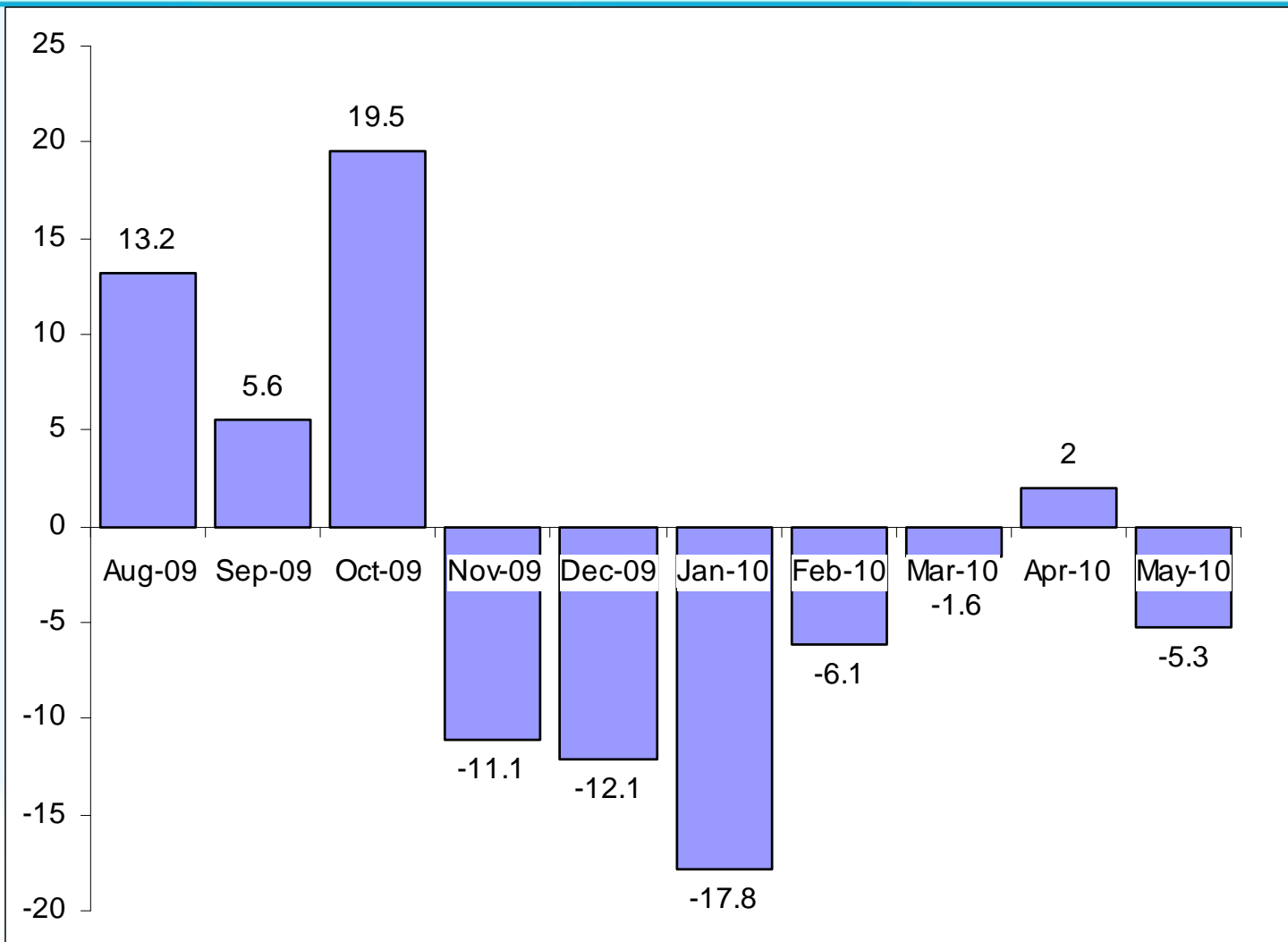
The actual percentage change in visitor numbers is shown for accommodation businesses in the SW Region.



Attractions in the SW Region who provided a percentage increase or decrease in visitor numbers, these are the averages of those figures.

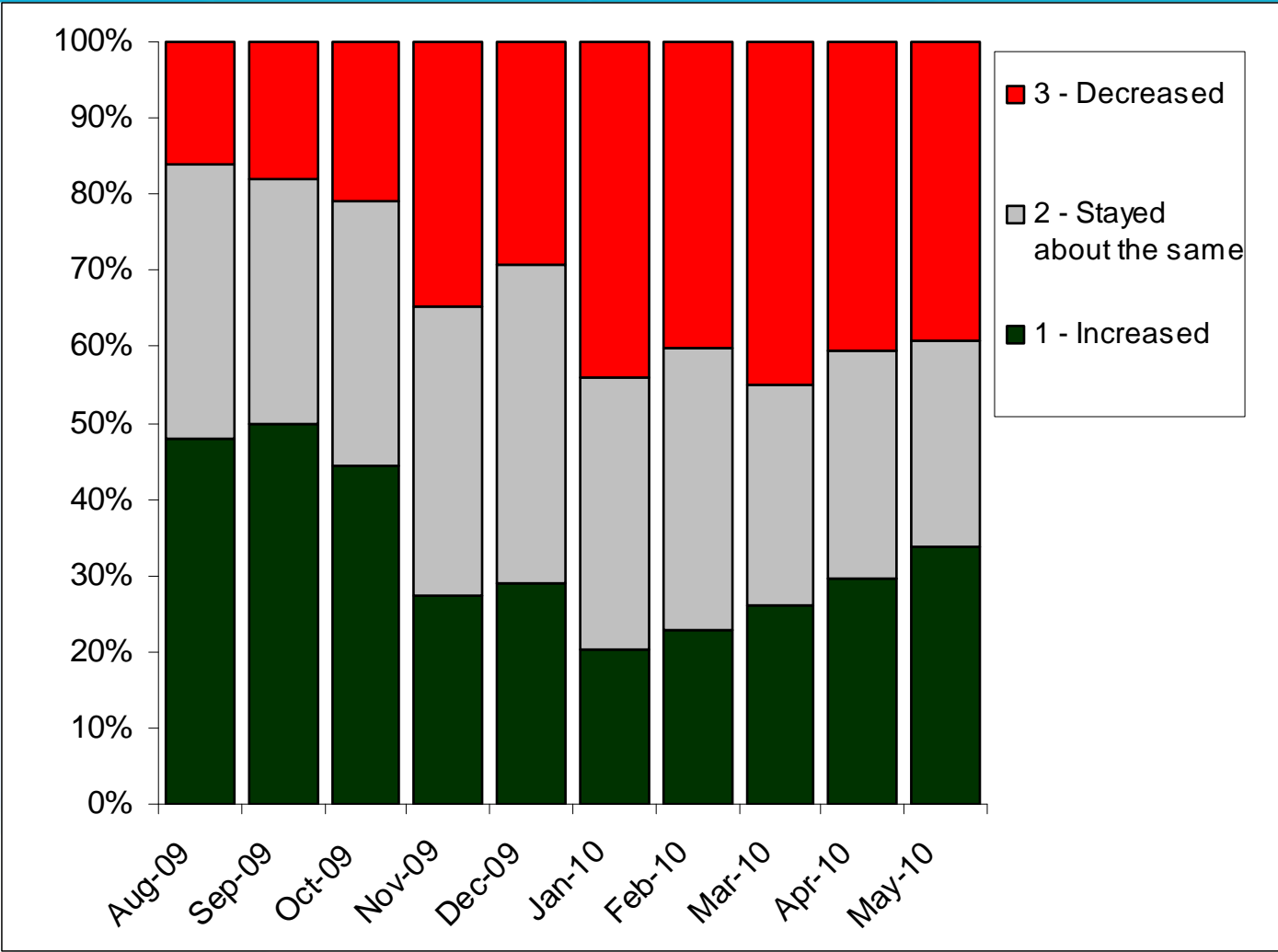


The actual percentage change in visitor numbers is shown for attractions in the SW Region.

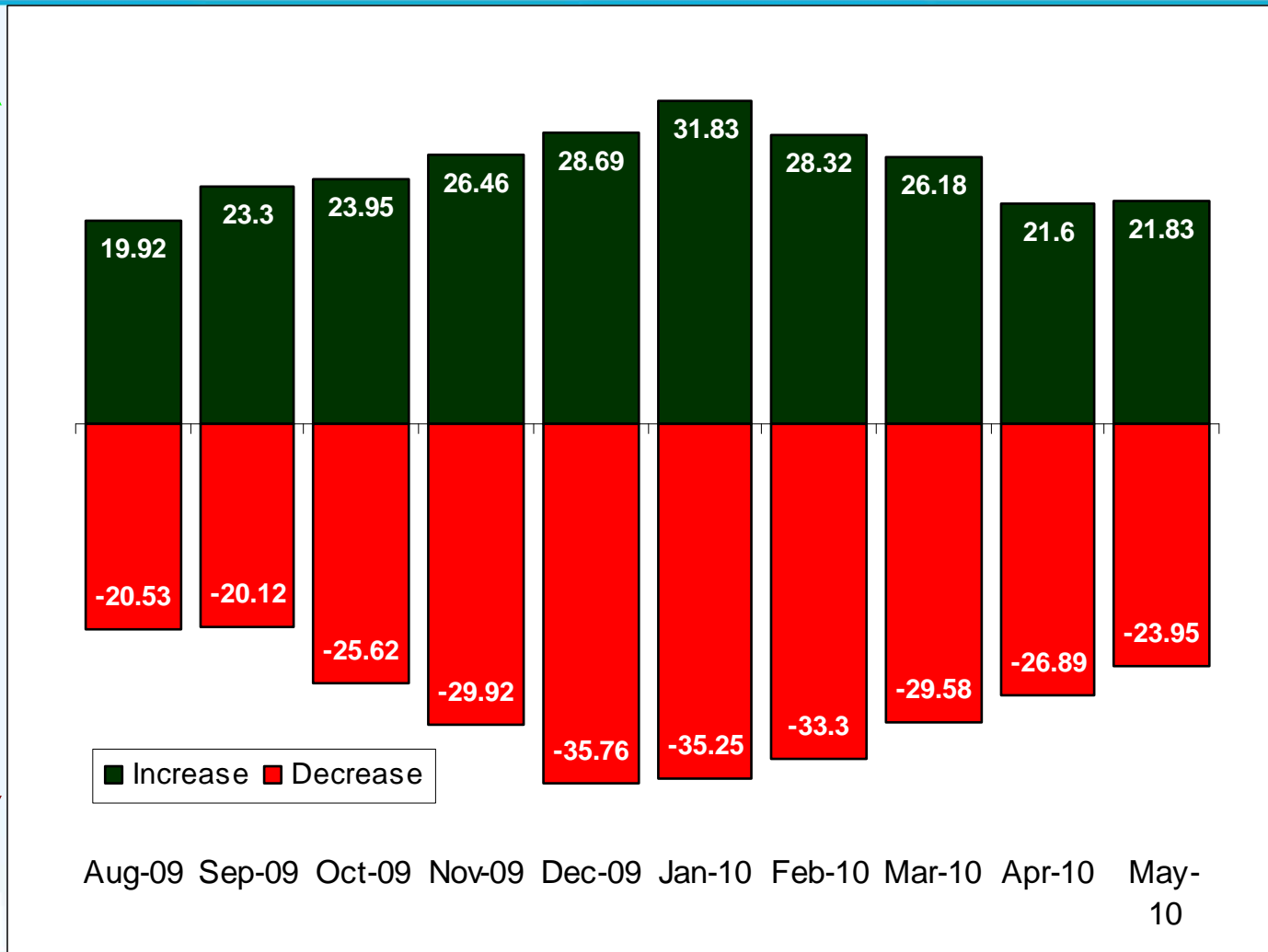


Business Performance - Turnover and Profitability.

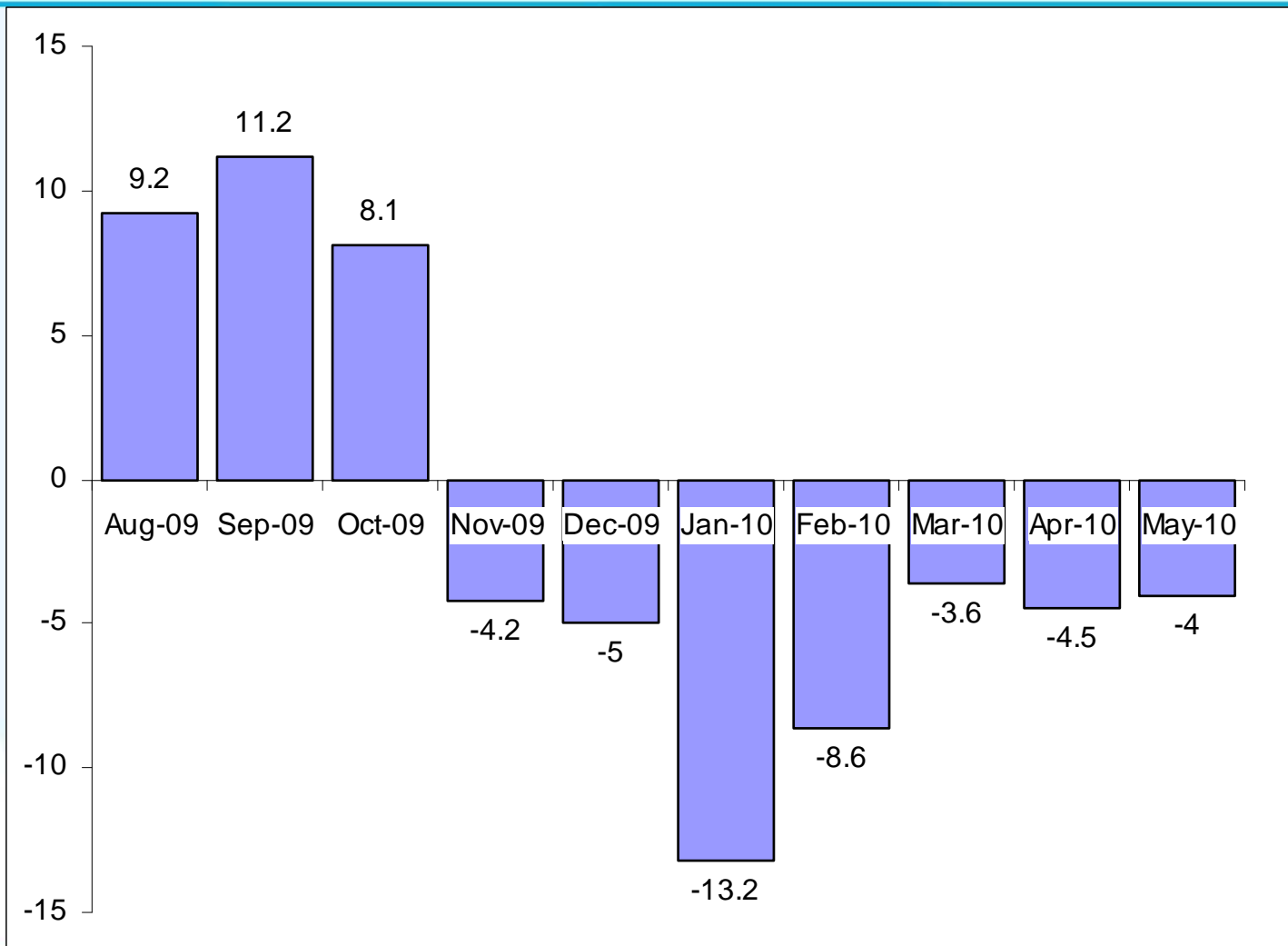
Businesses in the SW Region reported on their turnover, comparing e.g. August 09 to August 08.



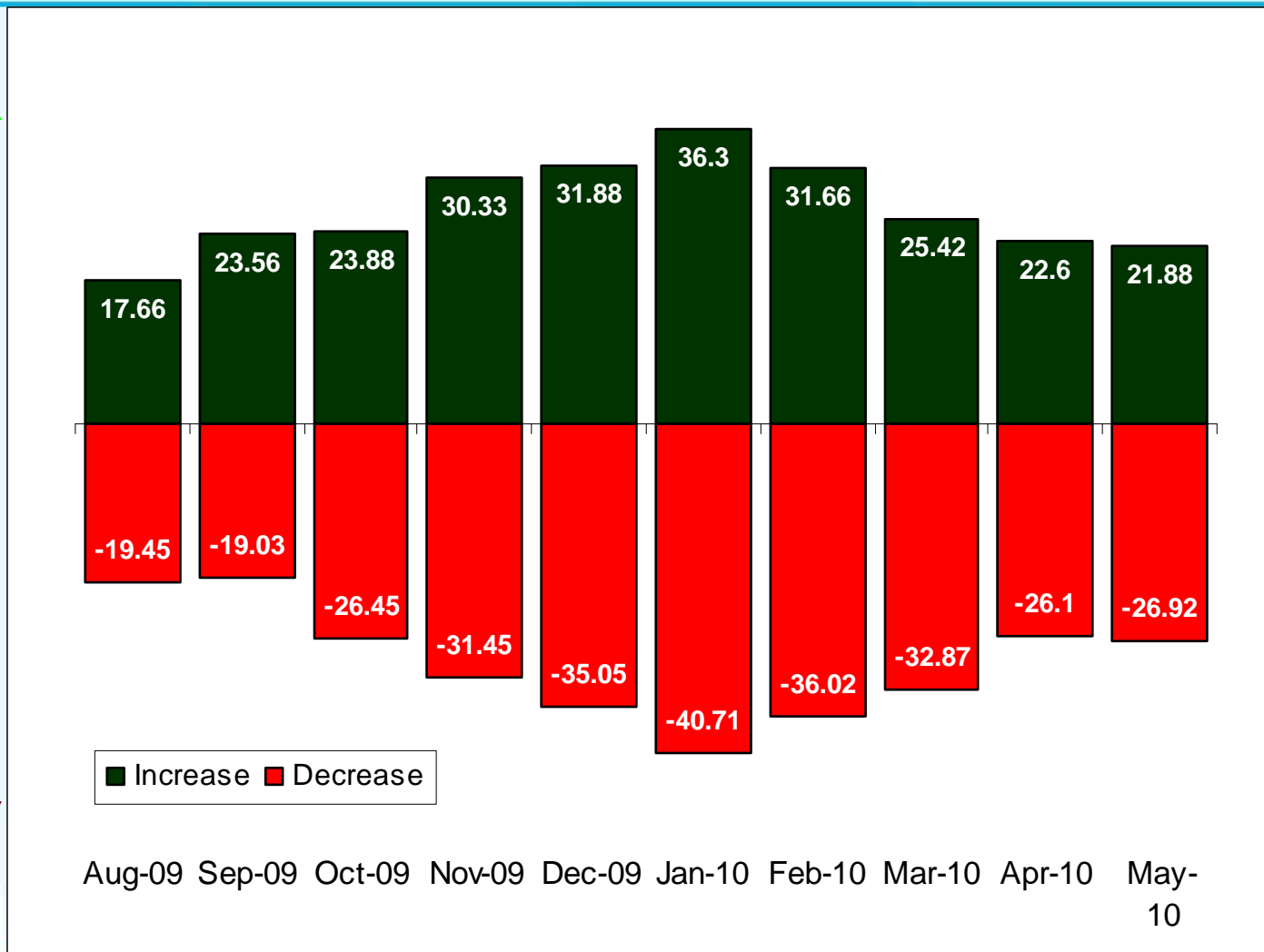
Businesses in the SW Region who provided a percentage increase or decrease in turnover, these are the averages of those figures.



The actual percentage change in turnover is shown for the SW Region.



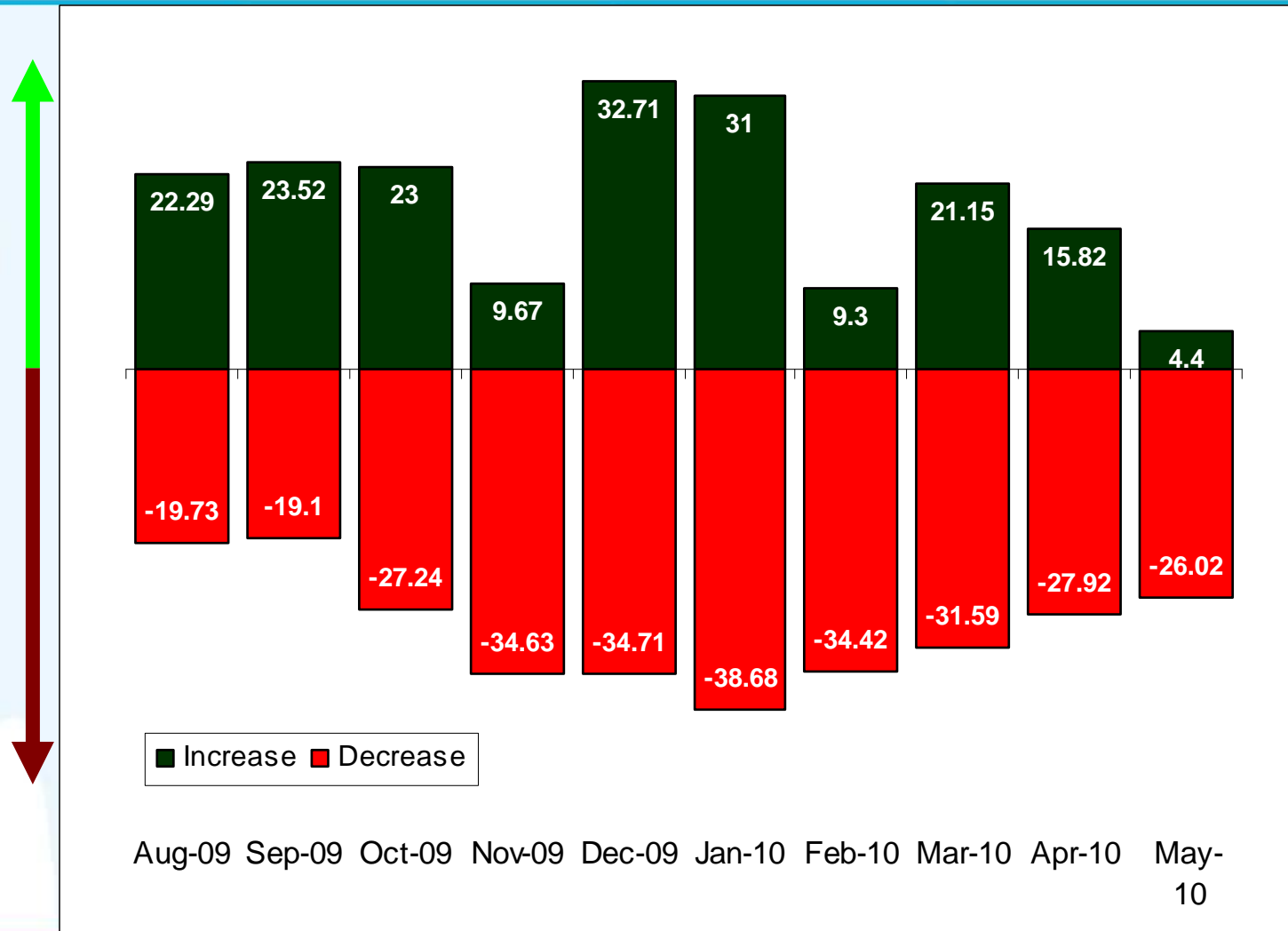
Accommodation businesses in the SW Region who provided a percentage increase or decrease in turnover, these are the averages of those figures.



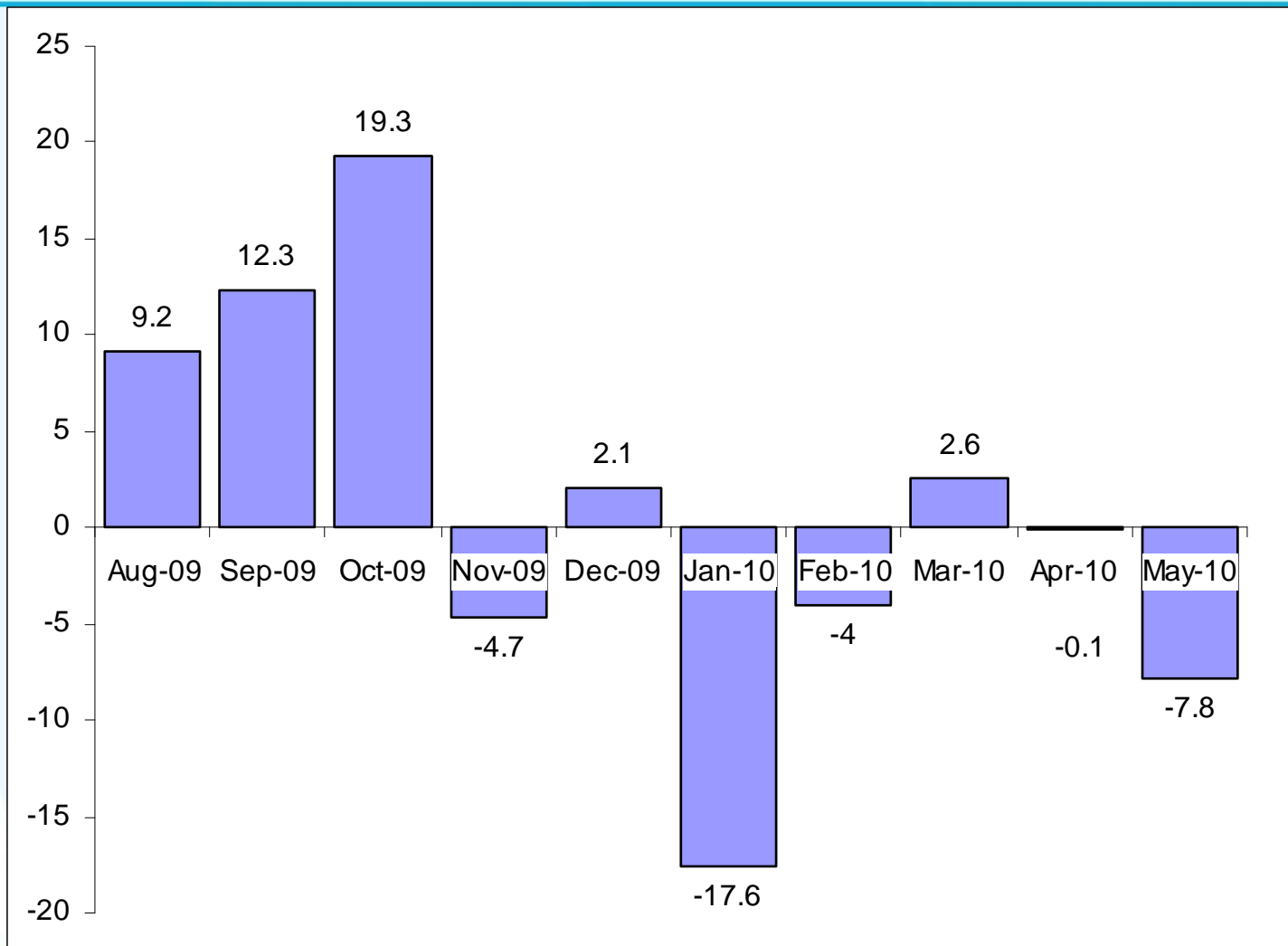
The actual percentage change in turnover is shown for Accommodation businesses in the SW Region.



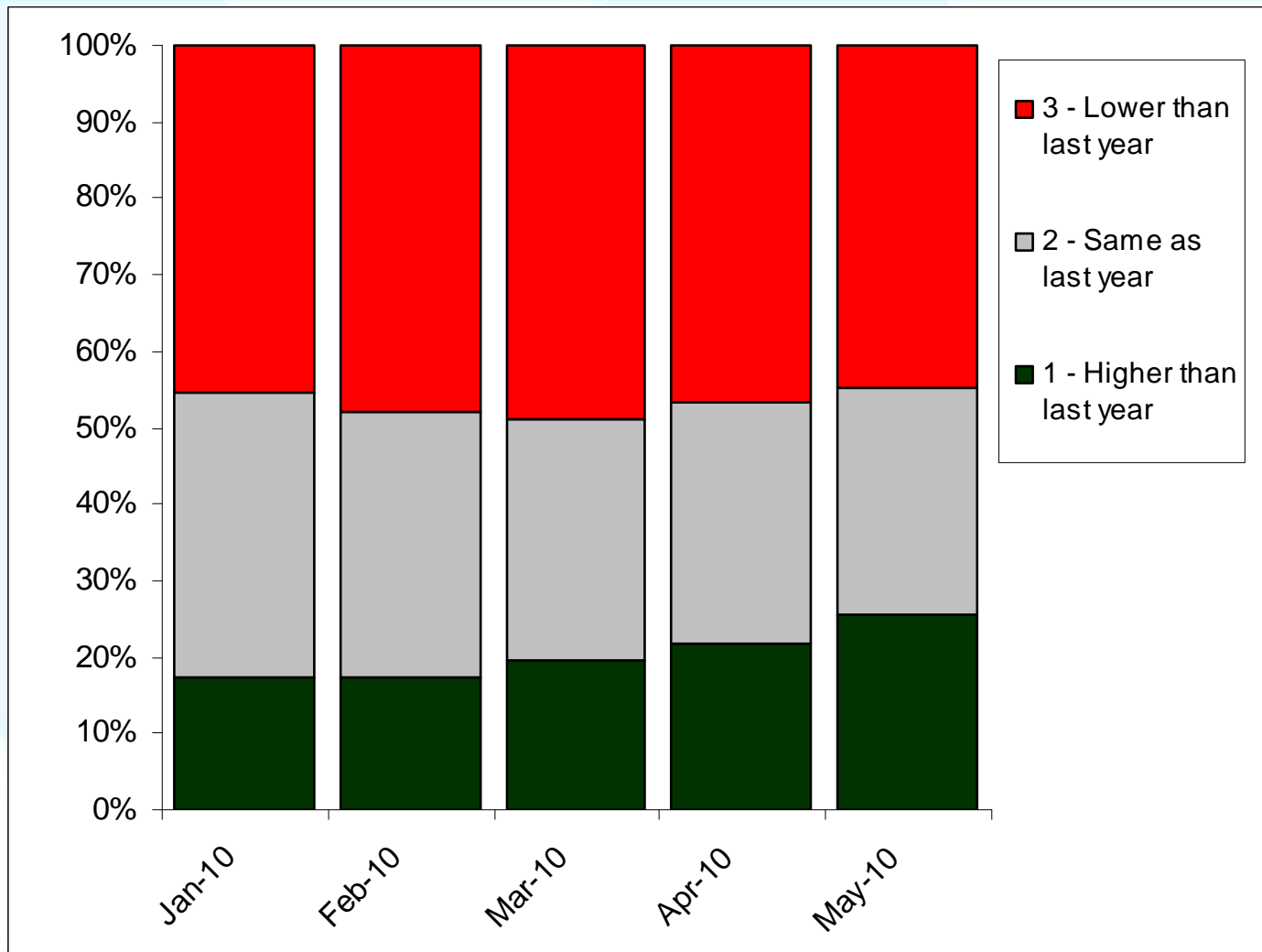
Attractions in the SW Region who provided a percentage increase or decrease in turnover, these are the averages of those figures.



The actual percentage change in turnover is shown for attractions in the SW Region.

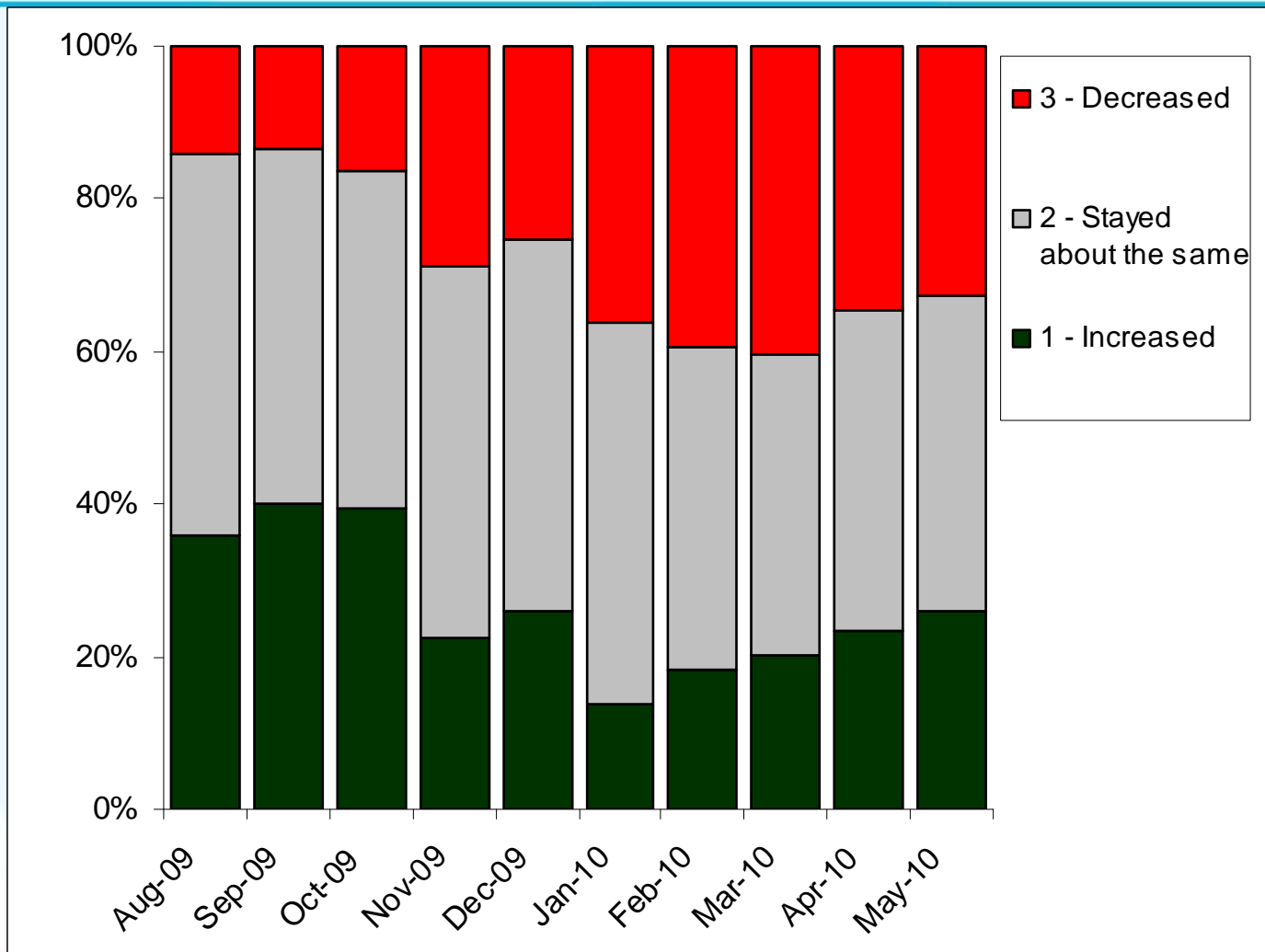


Businesses in the SW Region reported on their profitability, comparing e.g. January 10 to January 09.

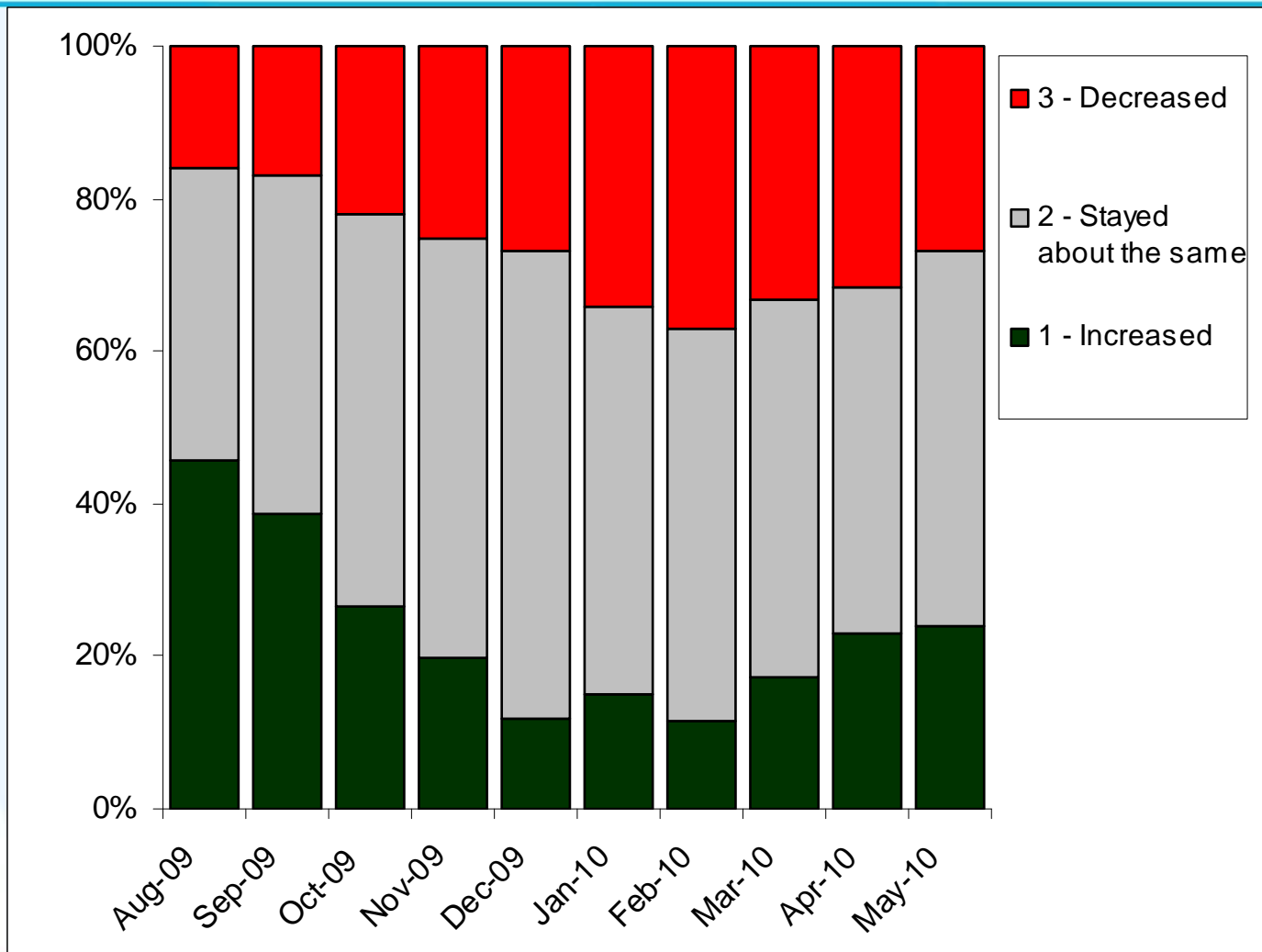


Visitor Characteristics.

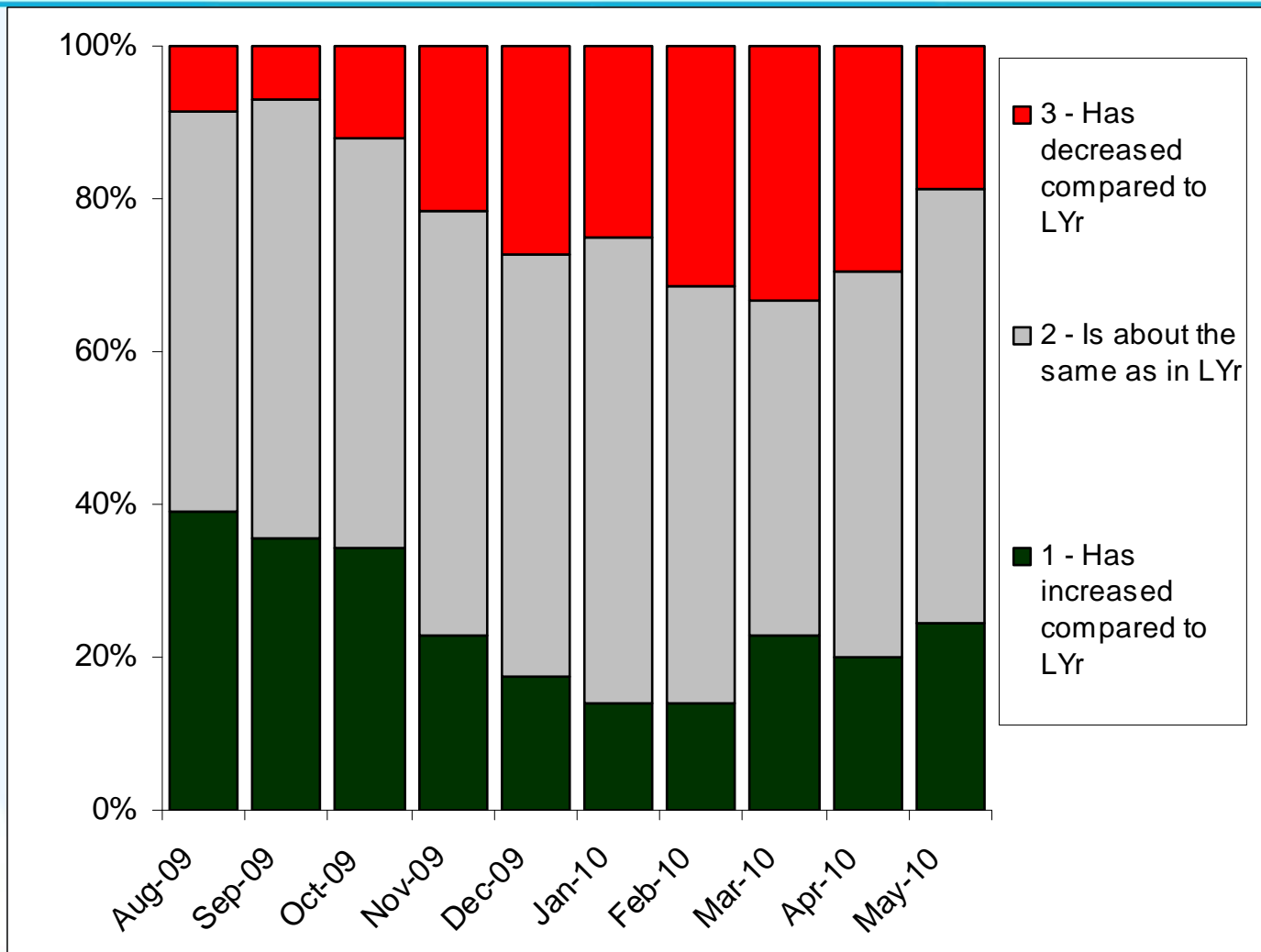
Businesses in the SW Region reported on their British visitor numbers, comparing e.g. August 09 to August 08.



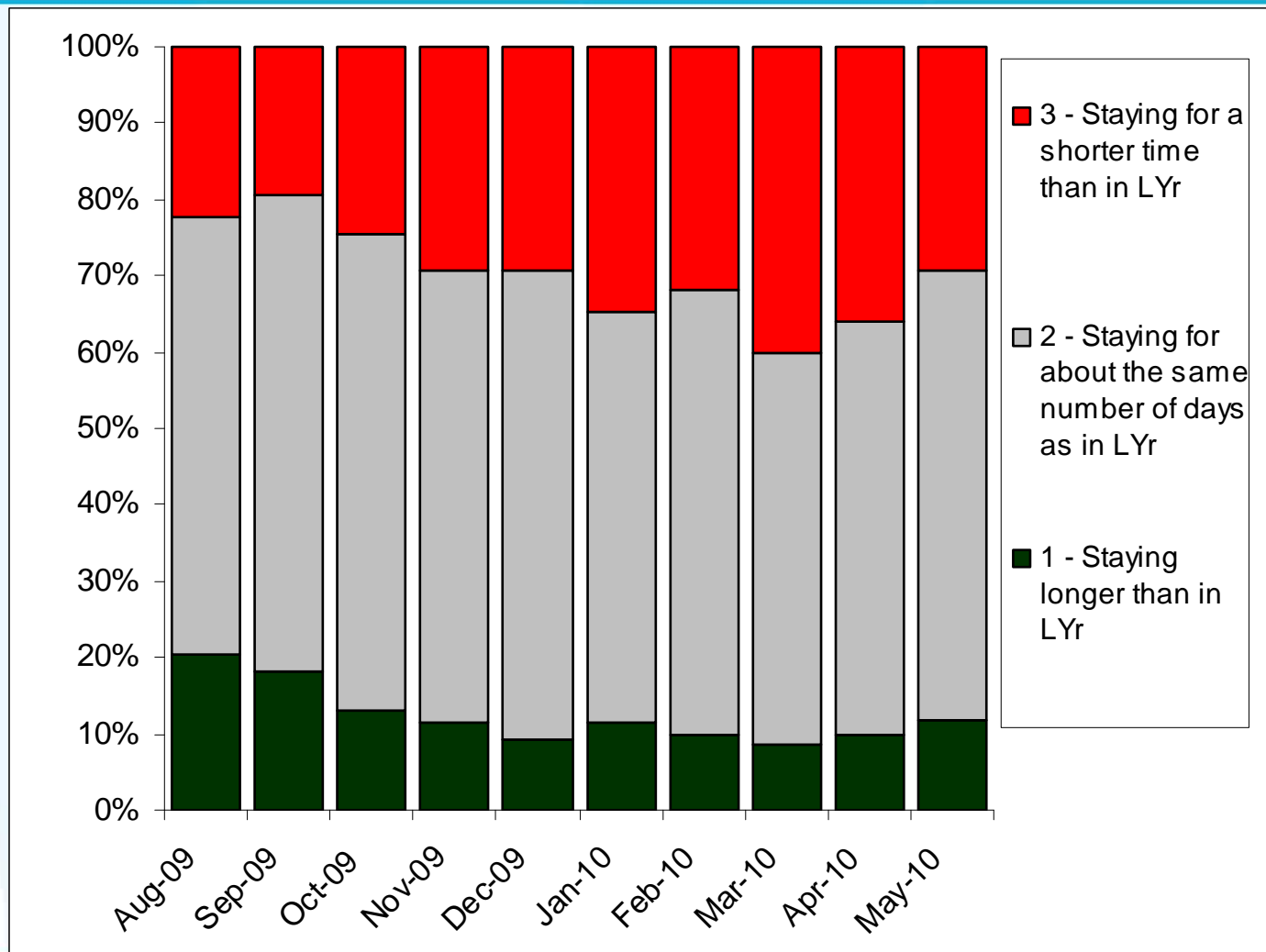
Businesses in the SW Region reported on their Overseas visitor numbers, comparing e.g. August 09 to August 08.



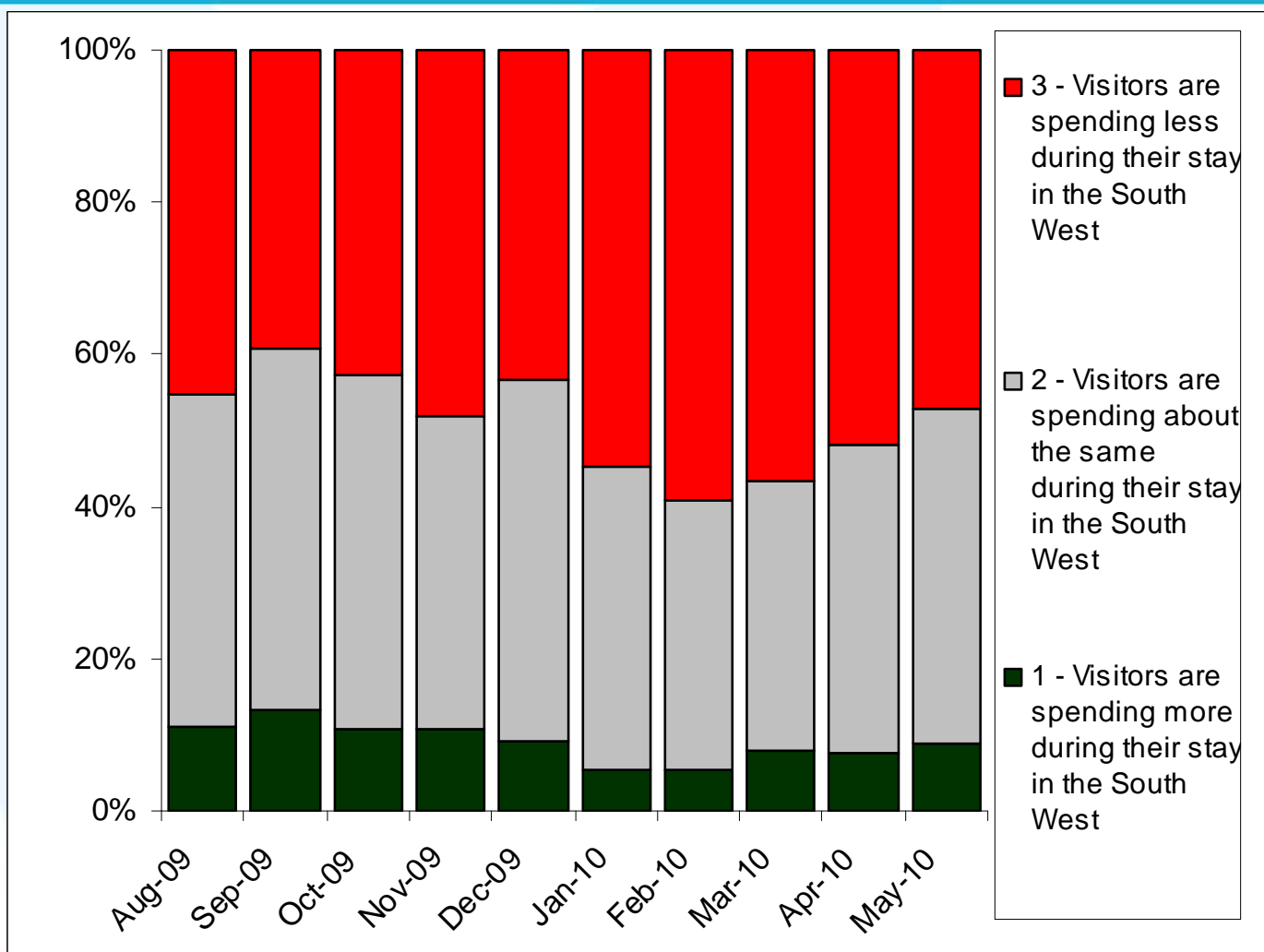
Businesses in the SW Region reported on their first time visitor numbers, comparing e.g. August 09 to August 08.



Businesses in the SW Region reported on the length of stay of visitors, comparing e.g. August 09 to August 08.

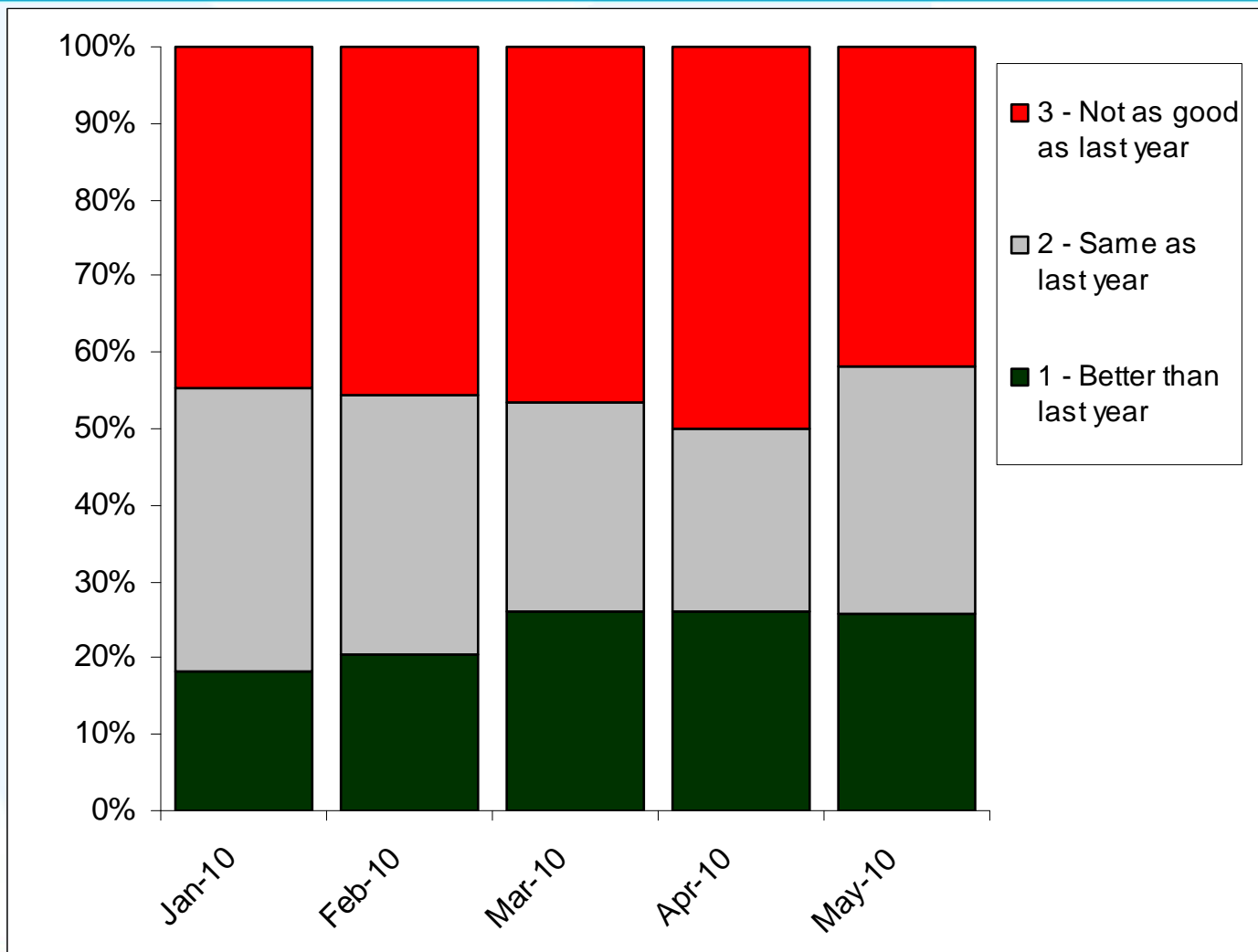


Businesses in the SW Region reported on the spending of visitors, comparing e.g. August 09 to August 08.

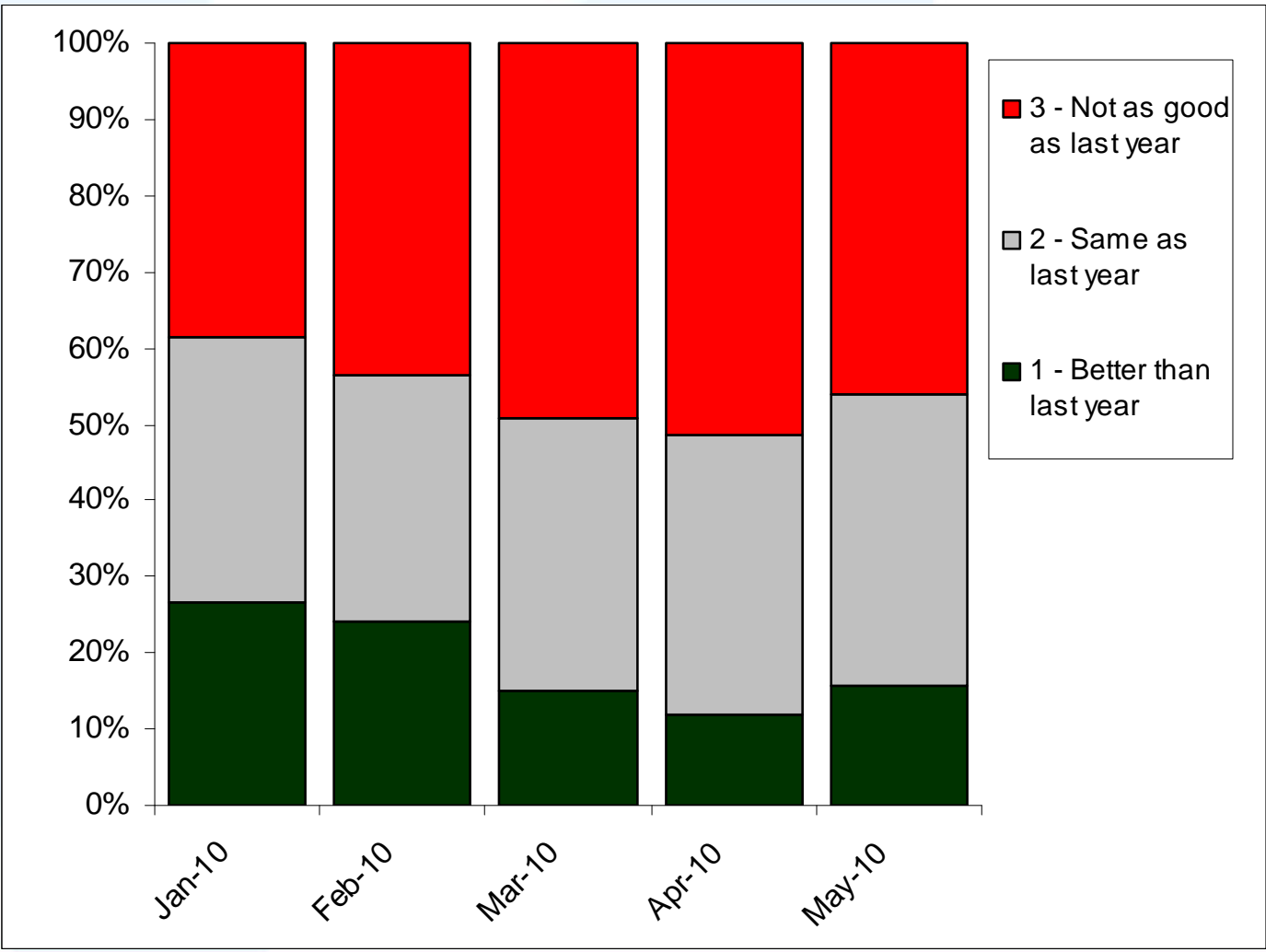


Booking levels and future outlook.

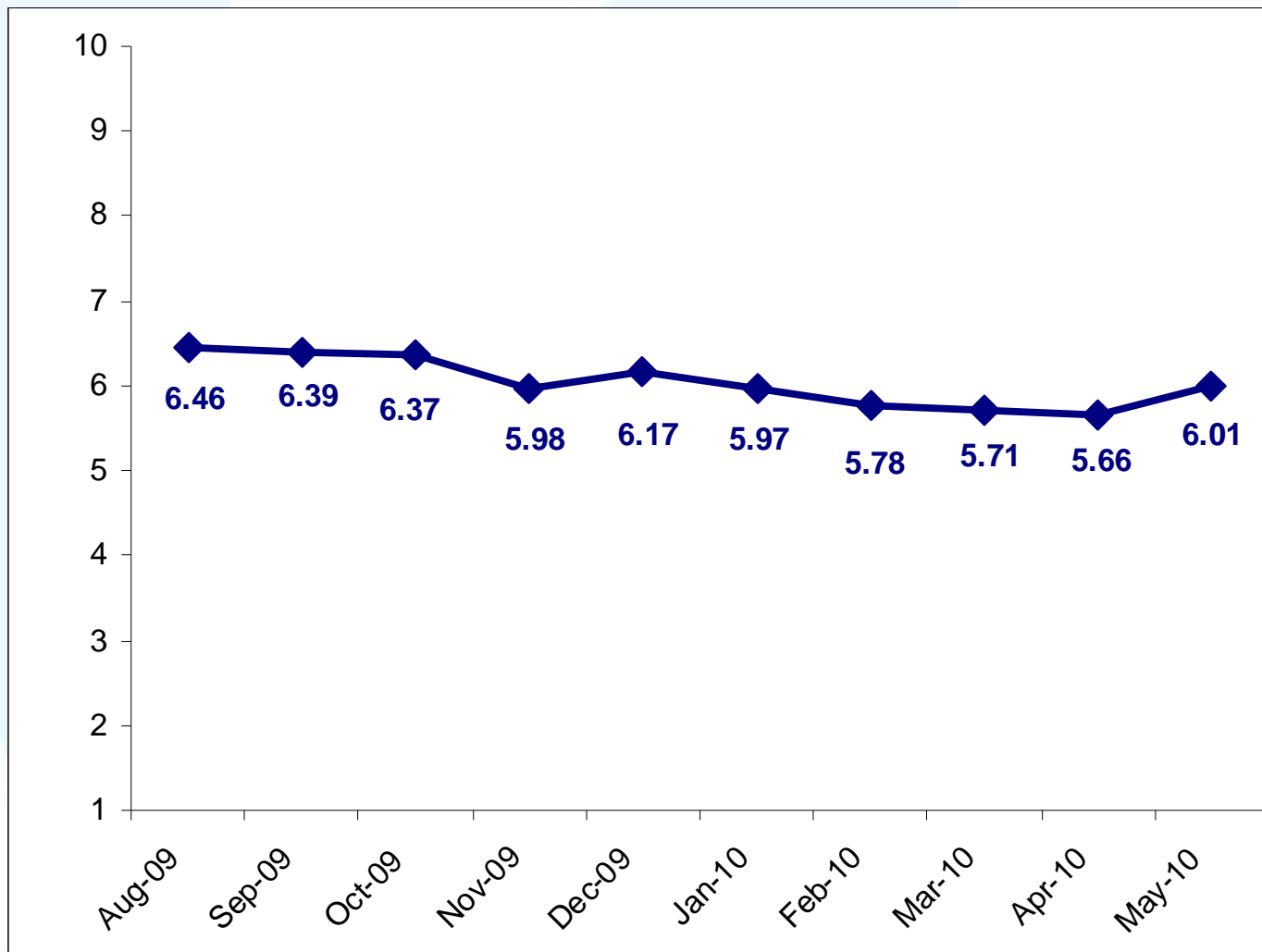
Businesses in the SW Region reported on their bookings up to Easter (in Jan, Feb, and Mar), and on their bookings to the summer months (in Apr), comparing levels with this time last year.



Businesses in the SW Region reported on their bookings after Easter (in Jan, Feb, and Mar), and on their bookings after the summer months (in Apr), comparing levels with this time last year.



Using a 1 to 10 scale (1 is very pessimistic, and 10 very optimistic) businesses in the SW Region provided a score for tourism prospects in the SW. This is the average.



Data tables.

The following slides present the data behind the charts shown previously.

Table 1	Business Type	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - An accommodation establishment	77%	79%	75%	72%	74%	74%	77%	74%	81%	77%	-	-
	2 - A visitor or leisure attraction	13%	11%	12%	11%	10%	12%	9%	10%	9%	9%	-	-
	3 - Sports or activities-based business	2%	2%	2%	2%	1%	1%	2%	2%	1%	2%	-	-
	4 - A food and drinks related business	3%	4%	3%	5%	4%	3%	2%	3%	3%	3%	-	-
	5 - A retail business (excluding food and drink)	1%	1%	1%	2%	1%	1%	2%	1%	0%	1%	-	-
	6 - A Tourist Information Centre	2%	1%	2%	1%	1%	1%	1%	1%	1%	1%	-	-
	8 - A self catering agency	3%	2%	2%	3%	3%	3%	2%	3%	2%	2%	-	-
	7 - Other type of business	-	-	4%	5%	5%	4%	5%	6%	4%	5%	-	-

Table 2	Accommodation type	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - A hotel (10 rooms or less)	3%	3%	5%	6%	3%	4%	7%	8%	5%	7%	-	-
	2 - A hotel (more than 10 rooms)	8%	9%	11%	10%	10%	10%	10%	8%	8%	11%	-	-
	3 - A bed & breakfast / guest house	44%	43%	43%	43%	44%	43%	43%	47%	50%	42%	-	-
	4 - Self catering accommodation	38%	38%	34%	36%	36%	36%	35%	31%	29%	33%	-	-
	5 - Holiday park	4%	6%	5%	4%	7%	6%	4%	6%	7%	5%	-	-
	6 - Other types of accommodation	1%	1%	2%	1%	1%	1%	1%	0%	1%	2%	-	-

Table 3	Quality grading	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - 1 star	-	0%	0%	0%	0%	-	0%	1%	-	0%	-	-
	2 - 2 stars	5%	3%	4%	5%	4%	6%	4%	5%	5%	4%	-	-
	3 - 3 stars	22%	25%	26%	27%	26%	27%	24%	24%	27%	25%	-	-
	4 - 4 stars	51%	50%	52%	45%	52%	48%	54%	51%	50%	50%	-	-
	5 - 5 stars	11%	10%	10%	10%	10%	12%	9%	10%	9%	10%	-	-
	6 - None	12%	12%	8%	11%	7%	8%	10%	10%	10%	10%	-	-

Table 4	Number of years business in operation	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - 1 year or less	8%	9%	6%	6%	6%	6%	5%	4%	5%	4%	-	-
	2 - 2-3 years	21%	20%	18%	17%	14%	18%	17%	17%	19%	17%	-	-
	3 - 4-5 years	13%	14%	15%	13%	16%	13%	15%	14%	14%	15%	-	-
	4 - 6-10 years	22%	19%	21%	21%	23%	23%	22%	21%	22%	24%	-	-
	5 - More than 10 years	36%	38%	41%	42%	41%	41%	42%	44%	40%	40%	-	-

Table 5	Visitor numbers compared to last year	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Increased	41%	45%	44%	27%	27%	19%	24%	26%	30%	31%	-	-
	2 - Stayed about the same	43%	36%	37%	37%	43%	38%	34%	29%	29%	29%	-	-
	3 - Decreased	16%	19%	20%	36%	30%	43%	42%	45%	41%	40%	-	-
Table 6	If numbers increased...	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	Mean increase in visitor numbers	21%	24%	24%	27%	28%	30%	29%	26%	21%	23%	-	-
Table 7	If numbers decreased...	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	Mean decrease in visitor numbers	-20%	-20%	-25%	-29%	-36%	-37%	-34%	-32%	-26%	-25%	-	-
Table 8	Turnover compared to last year	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Increased	48%	50%	44%	27%	29%	20%	23%	26%	30%	34%	-	-
	2 - Stayed about the same	36%	32%	35%	38%	42%	36%	37%	29%	30%	27%	-	-
	3 - Decreased	16%	18%	21%	35%	29%	44%	40%	45%	41%	39%	-	-
Table 9	If turnover increased...	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	Mean increase in turnover	20%	23%	24%	26%	29%	32%	28%	26%	22%	22%	-	-
Table 10	If turnover decreased...	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	Mean decrease in turnover	-21%	-20%	-26%	-30%	-36%	-35%	-33%	-30%	-27%	-24%	-	-

Table 11	British visitors compared to last year	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Increased	36%	40%	40%	22%	26%	14%	18%	20%	24%	26%	-	-
	2 - Stayed about the same	50%	46%	44%	49%	49%	50%	42%	39%	42%	42%	-	-
	3 - Decreased	14%	14%	16%	29%	25%	36%	40%	40%	35%	33%	-	-
Table 12	Overseas visitors compared to last year	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Increased	46%	39%	26%	20%	12%	15%	11%	17%	23%	24%	-	-
	2 - Stayed about the same	38%	44%	51%	55%	61%	51%	52%	50%	45%	49%	-	-
	3 - Decreased	16%	17%	22%	25%	27%	34%	37%	33%	32%	27%	-	-
Table 13	Length of stay	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Staying longer than in LYr	20%	18%	13%	11%	9%	11%	10%	9%	10%	12%	-	-
	2 - Staying for about the same number of days	58%	63%	62%	59%	61%	54%	58%	51%	54%	59%	-	-
	3 - Staying for a shorter time than in LYr	22%	19%	25%	29%	29%	35%	32%	40%	36%	29%	-	-
Table 14	Number of first time visitors	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Has increased compared to LYr	39%	35%	34%	23%	17%	14%	14%	23%	20%	24%	-	-
	2 - Is about the same as in LYr	52%	58%	53%	55%	55%	61%	55%	44%	50%	57%	-	-
	3 - Has decreased compared to LYr	9%	7%	12%	22%	27%	25%	31%	33%	30%	19%	-	-
Table 15	Spending by visitors	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Visitors are spending more during their stay	11%	13%	11%	11%	9%	5%	5%	8%	8%	9%	-	-
	2 - Visitors are spending about the same during their stay	44%	47%	47%	41%	48%	40%	35%	36%	41%	44%	-	-
	3 - Visitors are spending less during their stay	45%	39%	43%	48%	43%	55%	59%	57%	52%	47%	-	-

Table 16	Optimism score for tourism in SW	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	Mean score	6.46	6.39	6.37	5.98	6.17	5.97	5.78	5.71	5.66	6.01	-	-
Table 17	Business profitability	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Higher than last year	-	-	-	-	-	17%	17%	20%	22%	25%	-	-
	2 - Same as last year	-	-	-	-	-	37%	34%	31%	32%	30%	-	-
	3 - Lower than last year	-	-	-	-	-	45%	48%	49%	47%	45%	-	-
Table 18	Bookings up to Easter/ Summer*	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Better than last year	-	-	-	-	-	18%	20%	26%	26%	26%	-	-
	2 - Same as last year	-	-	-	-	-	37%	34%	28%	24%	32%	-	-
	3 - Not as good as last year	-	-	-	-	-	45%	46%	46%	50%	42%	-	-
* Easter for Jan/Feb/Mar; summer for April surveys													
Table 19	Bookings after Easter/ Summer*	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10
	1 - Better than last year	-	-	-	-	-	27%	24%	15%	12%	16%	-	-
	2 - Same as last year	-	-	-	-	-	35%	32%	36%	37%	38%	-	-
	3 - Not as good as last year	-	-	-	-	-	38%	44%	49%	52%	46%	-	-

South West Tourism (SWT)

South West Tourism is the independent strategic regional body for tourism, mainly funded by the South West of England Regional Development Agency.

Role of SWT:

- The leader and voice of tourism at regional level
- To provide intelligence, knowledge, advice, and promote best practice, in business operations, skills, quality and welcome
- The custodian of the regional tourism development strategy and regional tourism development plan
- To provide expert advice and guidance which facilitates wise and targeted investment in tourism infrastructure and development
- By working with “beacon businesses” to support tourism development in the region through T2015 Action Programmes, which tackle pan regional areas of weakness and opportunity
- To facilitate the continuous improvement in how the appeal of the region, the tourism experience themes and its destinations are communicated and promoted to our existing and potential visitors.

