

# Larking Gowen

## Snap shot survey results

Between 19 August and 23 August Larking Gowen opened a 'snap shot survey' targeting tourism and leisure businesses throughout Norfolk, Suffolk and Essex. 142 responses were received and we are grateful for the impressive response during what is naturally a very busy time for the sector.

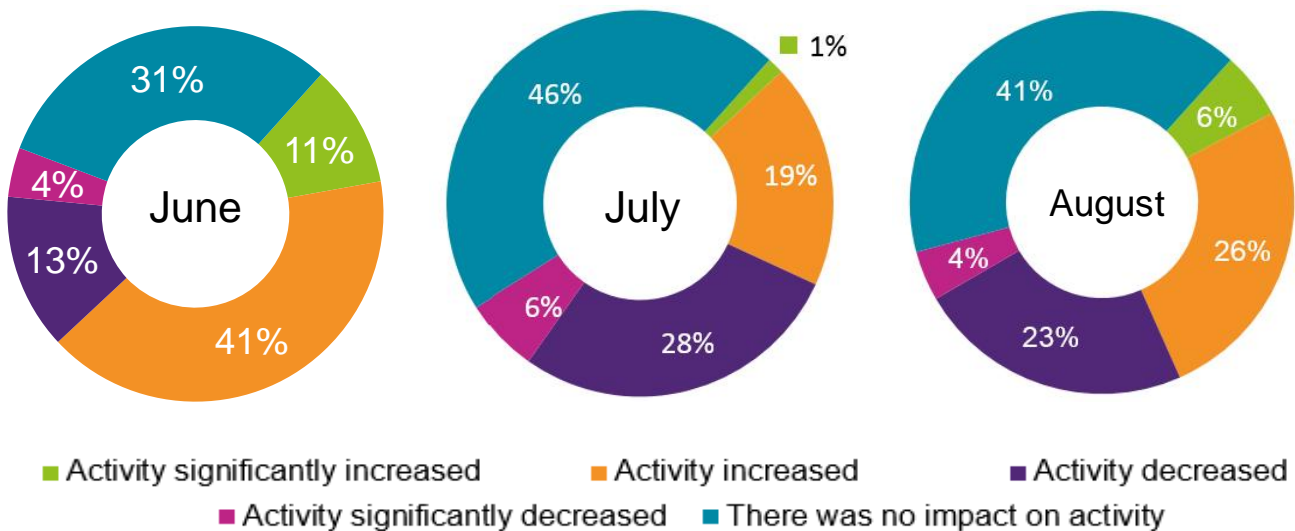
The first three questions covered how the weather affected activity during the months of June, July and August (to date). The questions were:

**Question 1:** With June seeing the longest hot spell since 1976, did this have an impact on activity?

**Question 2:** With July seeing the most rainfall for five years, did this have an immediate impact on activity?

**Question 3:** With August being indifferent so far (a typical summer) has this had an impact on activity?

The results were:



The Met Office recorded the highest temperature as 34.5 centigrade during June 2017. It also recorded better than average sunshine hours. The Met Office issued several yellow weather warnings for heavy rain from the end of June and throughout July 2017, where a number of storms were seen sweeping across areas of East Anglia, resulting in the loss of power and closure of railway lines.

While many desire 'good' weather, it is clear from the results that when the weather is questionable the majority of businesses surveyed either saw no impact on their activity, or saw increased or significant increase in activity. Businesses have a short window of opportunity to benefit from growth in the summer months. However some saw a decrease in activity levels during these key months (17% in June; 34% in July and 27% in August).

The positive responses show that our region offers a wide range of activities that are not solely weather dependent and this suggests a better awareness of what East Anglia has to offer, our accessibility and the range of activities on offer here.

The reasons some saw decline were weather related (the weather being too hot can have the same impact as too much rain) while others were impacted by factors outside their control. Overall, businesses previously had positive periods of activity, against which they are now benchmarking; hence the decline recorded.

The feedback highlights that the consumers enjoying holiday or leisure time in our region understand our climate and this is not affecting their plans and activities. The eclectic mix of what the three counties have to offer is clearly a strength, making the region relatively weather resilient.

Some of the participants made the following comments:

*“Despite being an outdoor attraction, we saw an increase in visitor numbers and income on last year”.*

*“We were at full capacity this year, as we were last year”.*

*“We have had more cancellations than normal but have mostly been able to re-sell rooms”.*

#### Question 4:

**Do you believe the changeability of the weather this summer will impact the trend for holidays next year?**

There is a perception that poor weather in one year could impact the decision making of visitors for future years. Business owners clearly believe that the majority of those taking holidays and enjoying leisure time in our region don't follow this trend.

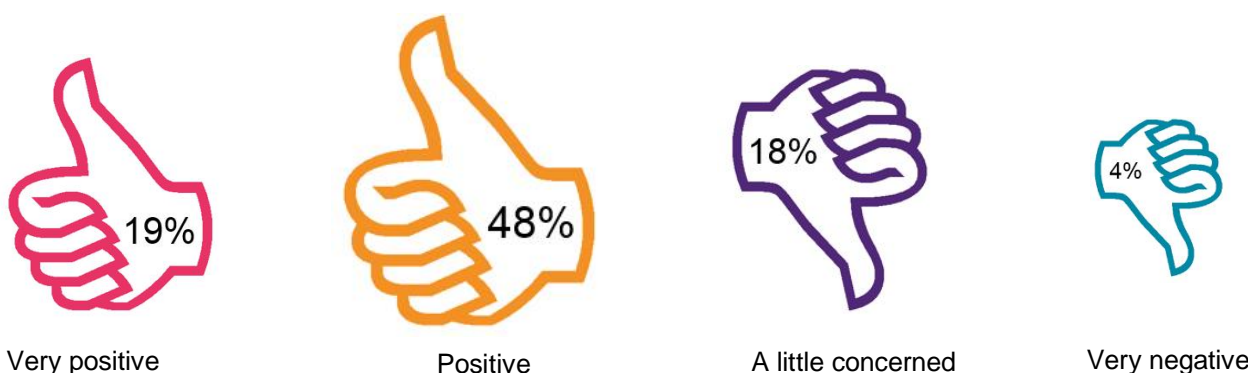
Nearly 3 in 5 stated that visitors to our region understand the weather and will keep coming back regardless. However, 1 in 5 businesses indicated that some customers will start thinking about holidaying abroad, seeking out better weather. While a similar level anticipate that meteorological factors will lead to customers, staying in the UK, booking later.

The popularity of the area, has led a small percentage of business (2%) to believe that limited availability within the region means that tourists will be booking earlier, regardless of weather. If this is a factor then extending the trend to the shoulder months around the main seasons will bring substantial rewards.



#### Question 5:

**Based on results for this summer how positive are you feeling about the rest of 2017?**

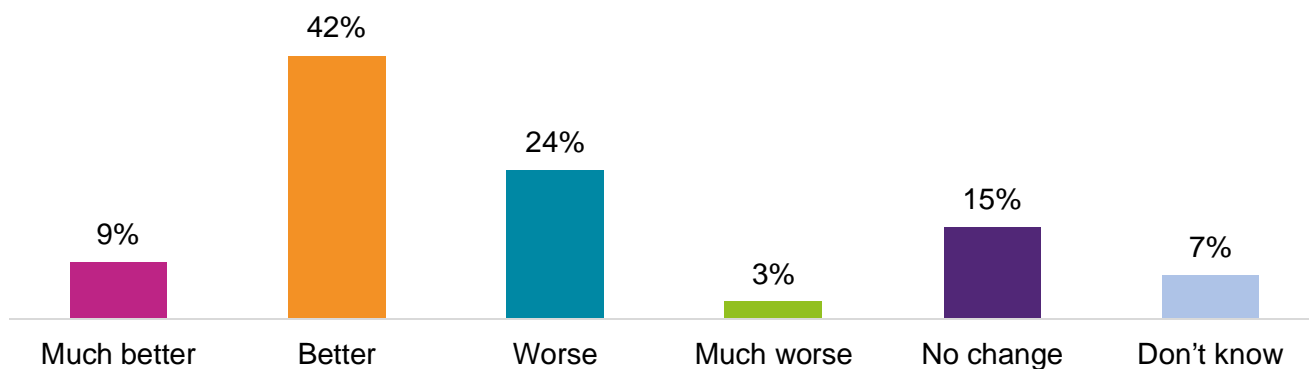


(11% of participants were indifferent).

Business activity to date has been good, and therefore the majority of tourism businesses are feeling positive about the rest of 2017. Only a small number of businesses are feeling very negative about the near future. The factors may not be wholly related to the impact of the weather, but lost business in the high season can't be recovered later in the year, and these views would appear to reflect this. Interestingly, 22% of businesses feeling negative about the rest of the year is consistent with expectations identified by a similar percentage at the start of the year in the [Larking Gowen Tourism and Leisure Business Survey 2017](#) where 21% of businesses said they felt less optimistic about the future.

### Question 6:

By comparison to the summer of 2016 how has trade performed overall?



The strength of the tourism sector in our region is clearly outlined in the results with a better performance for 2017 in comparison with 2016. However, 1 in 6 businesses indicated no change while 1 in 4 have acknowledged that this year has been worse for them.

Some of the participators made the following comments:

*"The shoulder months have been better, during high season we were at full capacity".*  
*"There has been a steady stream of good bookings".*

Anecdotal comments indicate that in some cases the positive impact was not just volume. In several cases a reduced number of actual visitors was outlined, but the spending levels had increased. This is an interesting observation when economically incomes are being squeezed and inflation rising.

### Question 7:

Do you think Brexit has impacted your visitor numbers this summer?



From the feedback received, 1 in 3 businesses were not clear as to whether Brexit had impacted the visitor numbers this summer.

Of those businesses measuring the impact of Brexit, the vast majority suggested that there was no impact while similar numbers appeared to have either been positively or negatively affected. Some feedback indicated that the election had as much of an impact on customer decision making and timing of decisions, with the movement in the value of the pound being the largest influencing factor.

## Our thanks

We would like to thank all of those who participated in this survey for their time and support. We are very grateful to those who support the sector and the organisations that work with the businesses.

Helen Cutting, Brand Manager for Visit Suffolk, saw longer term and season extending benefits when she said:

*"It is positive to see that generally businesses are prepared for the British weather and that visitors likewise know that a holiday in the UK doesn't always promise sunshine. With businesses reporting a better year than 2016 and Brexit not having a huge effect at the moment, it puts the region in a good position to further develop as an all-year-round destination."*

Lisa Bone, Strategic Tourism Manager for Visit Essex, had similar views, highlighting the opportunity to benefit from recurring business and said:

*"Most Essex attractions are suitable for 'all weather', and even those 'outside' continue to operate if it rains, so to hear that both Brexit and the English weather generally, have had little effect on our visitor numbers, is reassuring. Going into the last quarter of 2017, the region's businesses will continue to ensure their visitors enjoy a great experience, encouraging new and repeat business, whatever the weather!"*

## Your opportunity to engage

If you believe there are other issues which could be usefully explored and shared in the sector please do not hesitate to contact us. Our aim is to provide current, relevant data to businesses in the sector and we are open to ideas and initiatives.

Our surveys are completely confidential and we do not share any information other than the collective results with any third party or tourism body. If you would like to discuss the findings outlined above or any aspect of our surveys, please contact:

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