



DMO Summer Survey 2024

Survey overview



This summer, we worked with the Destination Marketing Organisations (DMOs) in East Anglia to get an understanding of the tourism, leisure and hospitality sector across the area. This has allowed us to see how businesses have performed over the summer season and how external factors have contributed and impacted them.

We all love to talk about the weather and that topic featured heavily in many parts of the results.

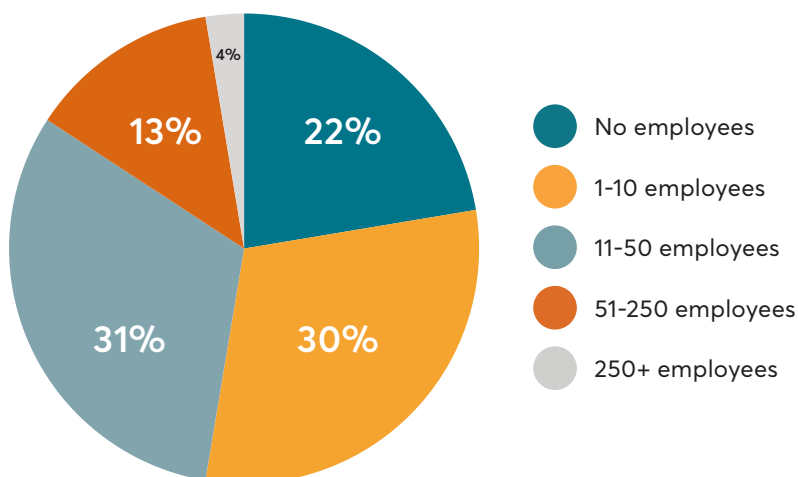
Respondents

Respondents were a good cross section of business types including the following:

- Boat hire/day boat hire
- Camping/caravan sites/holiday parks
- Hotels/guest houses/B&Bs
- Self-catering cottages/apartments
- Leisure resort/sport and leisure
- Museums/historic buildings/arts
- Pubs/restaurants
- Retail
- Attractions

Many respondents were part of more than one DMO.

Size of businesses participating in survey



Changes in footfall



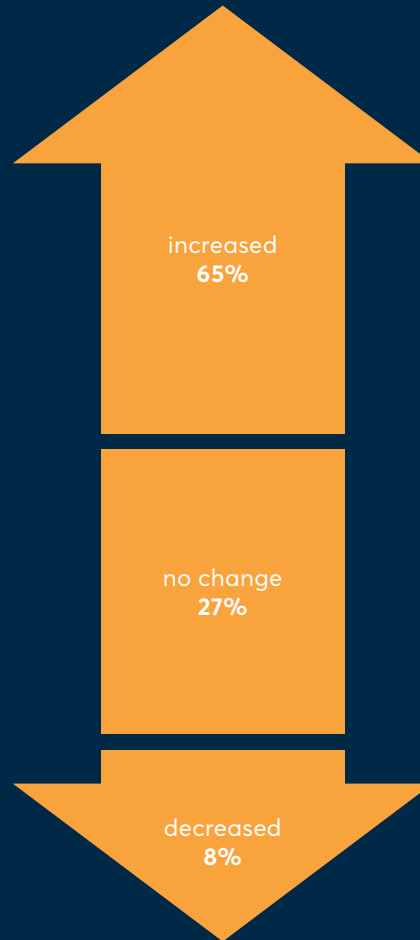
Of the respondents that noted an increased footfall, this was mainly as a result of increased marketing, displays and offers.

Those that saw a decrease said this was largely down to the poor weather at the beginning of the season.

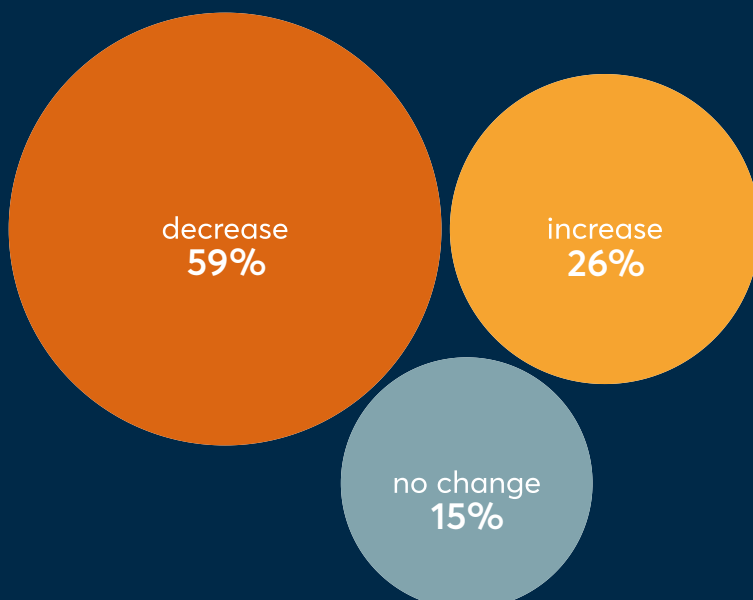
Changes to gate/admission/tickets sales/bookings

The responses showed that increased marketing had been beneficial improving the number of tickets or bookings by up to 10%.

Those that saw a decrease said sales had been impacted by the poor weather at the beginning of the season. They also felt that visitors were feeling the pinch and had less money available to spend on days out.



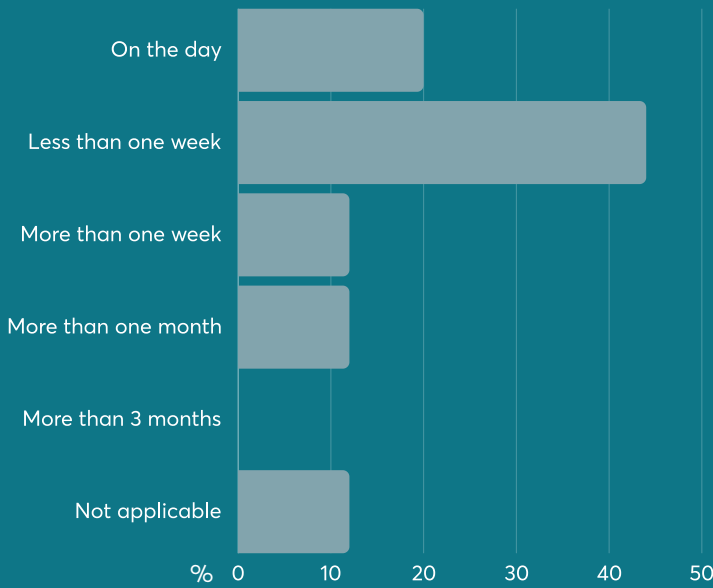
Changes to occupancy rates



26% said they had seen an increase in the region of 6-10%.

Those that saw a decrease cited a number of different reasons, some weather related, some cost of living related, but the majority couldn't identify the exact reasons.

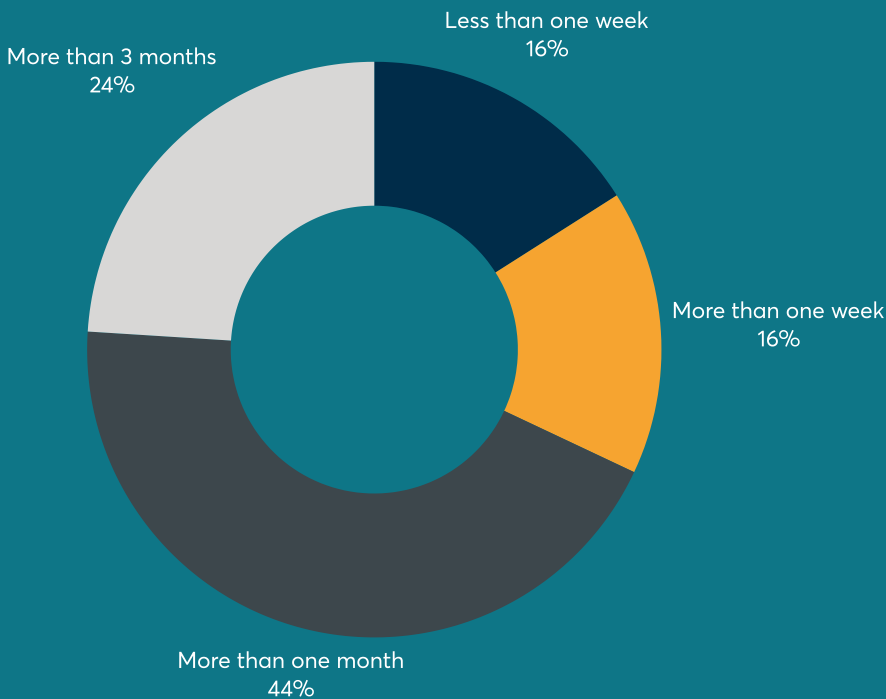
Advance bookings for attractions



Short term bookings for attractions seemed to be the trend, with some noting that bookings came through the night before, once guests had checked the weather. Bigger events tended to be booked in advance.

Advance bookings for accommodation

68% of people said they were getting bookings one month or more in advance which they said was helpful for business planning.

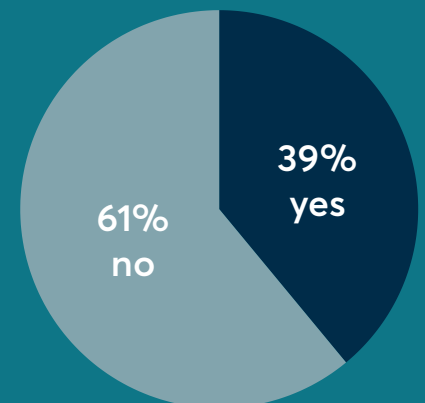


Changes to opening hours

85% of businesses responded that their opening hours had stayed the same as the previous summer, with the remaining 15%, mainly attractions, citing increased opening times.

For those offering accommodation, just two people responded that the hours had decreased.

Have there been any special offers or promotions?

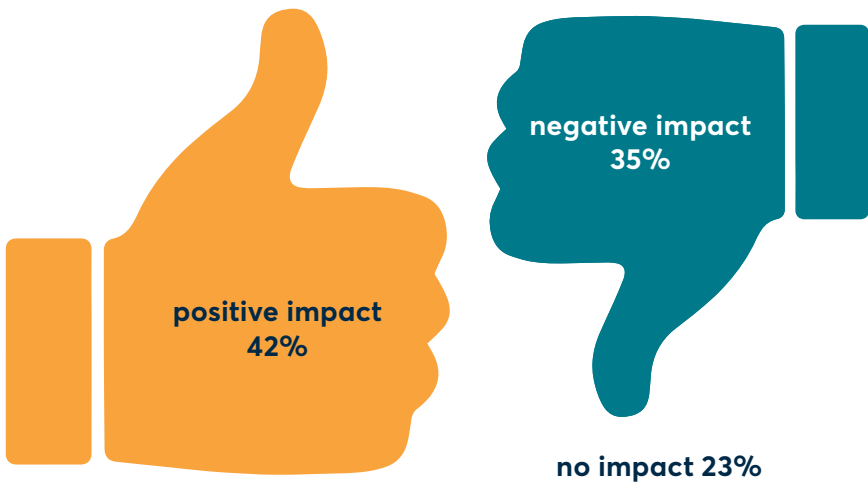


39% of those surveyed had initiated special offers or promotions to attract customers.

Fewer than 10% of respondents in the hospitality sector stated that they had increased the amount of complementary goods or services they were offering to guests.

Weather

A topic we all love to talk about is the weather and it featured heavily in many responses. The results are very much a mixed bag, very much due to the early rainfall and then the sun making an appearance over the school summer holidays.



If anything, the weather was too good for inland attractions however it probably attracted more holidaymakers into Norfolk."

Businesses operating mainly indoors noted that the wet weather was helpful in attracting more footfall earlier on in the season.

Once the summer holiday brought along the sunshine, there were 'too few rainy days' for some. The outdoor attractions then benefitted from the increase in visitors as well as sales of ice creams and soft drinks.

For those offering accommodation, it seemed that the rain dampened enthusiasm to book ahead. Campsites are an example of businesses that were affected by this, and the slow start didn't help the season overall.

June and July were quiet, with August improving. Bookings came in later than usual and were impacted by the very unpredictable weather.

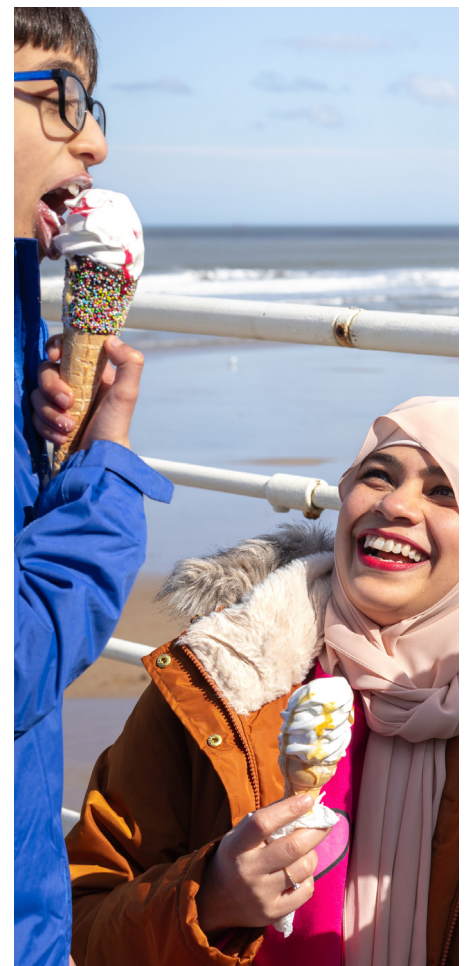
Customer spending behaviours

"Customers are being very careful with money. They want more value, are asking for discounts and being very price conscious."

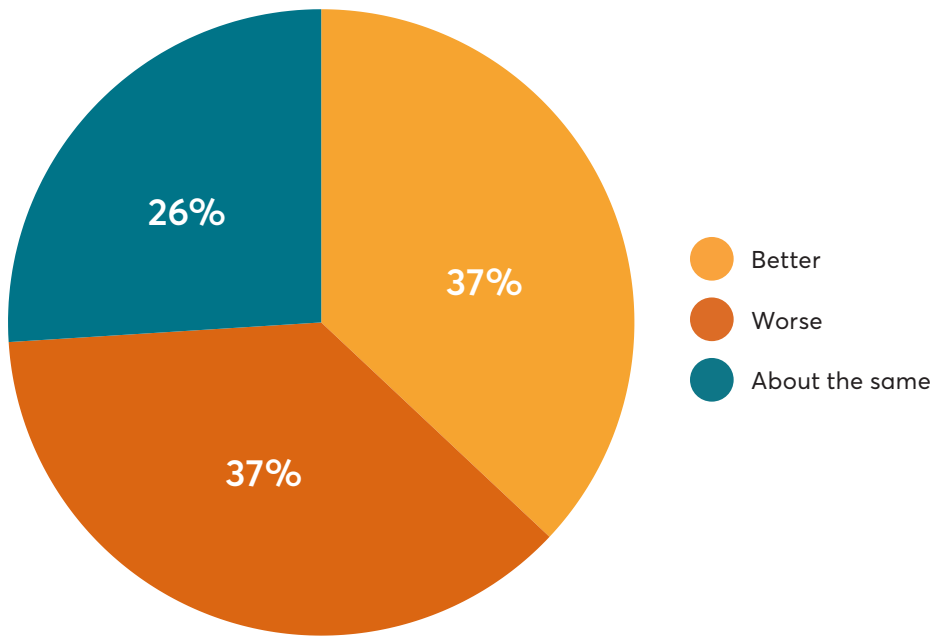
"Although people are taking fewer days out, they're making the most of the day and spending more whilst they are out."

"Secondary spend seemed to decline generally, except for café and shop purchases, which saw significant increase."

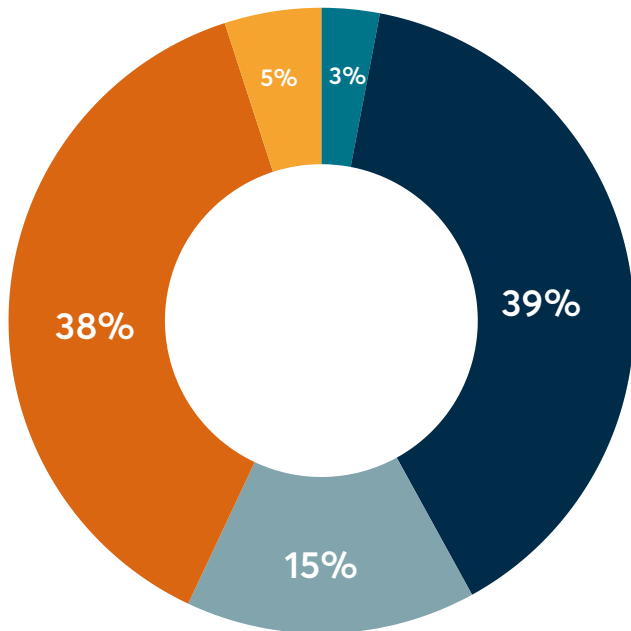
"People are choosing cheaper stays and booking last minute. They're taking shorter breaks and outside of the peak season."



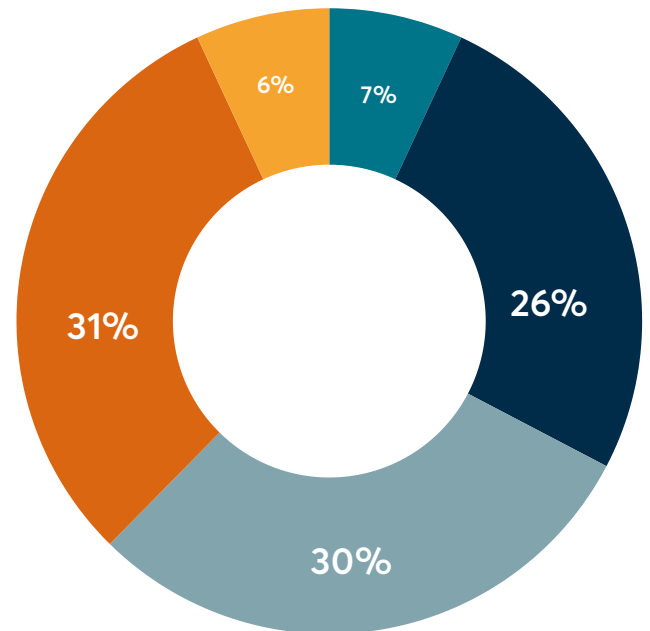
How did businesses rate their overall performance compared to 2023



Outlook for the Autumn season



Outlook for the Christmas season



Outlook for 2025 – will it be as challenging?

81% said yes. They thought 2025 would be challenging for businesses, with households having less disposable income. The uncertainty over the new Government and their plans was a common worry, and concerns that increases in taxes could halt expansion plans caused more uncertainty.

Of the 19% that said no, comments were that they felt prepared for challenges that could lay ahead. They have products available and they're expecting continued year-on-year growth. Advance bookings for 2025 are up, better reviews are coming in, and they're optimistic consumer confidence is growing.



Larking Gowen Tourism Business Survey

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Each year, we ask hundreds of East Anglian tourism, leisure and hospitality businesses to participate in our survey. Sign up to our mailing list to be part of future decisions for the tourism industry and benchmark yourself against other businesses to fully understand your market.



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