



Business sentiment

Q1 2023

114 Total respondents



Key Findings

114 Total respondents

Key Findings

Business performance



- **60%** of businesses surveyed said visitor/guest numbers were down compared to Q1 last year.



- **56%** stated that their overall business performance for Q1 2023 was worse than Q1 last year, with **22%** suggesting it was much worse.



- **63%** of businesses stated that they were confident in the performance of their business going forward for Q2 (April – June) 2023. Visitor attractions were the most confident sector, with **100%** of those businesses stating that they were either very confident or fairly confident for Q2 2023.



Key Findings

Business performance



- “Energy prices” were the main concern for businesses with **95%** stating this was a concern. “Increase in the price of goods and services” was the next concern with **67%** saying this was a worry, followed by “inflation” with **61%** of business surveyed suggesting this was a concern to them.



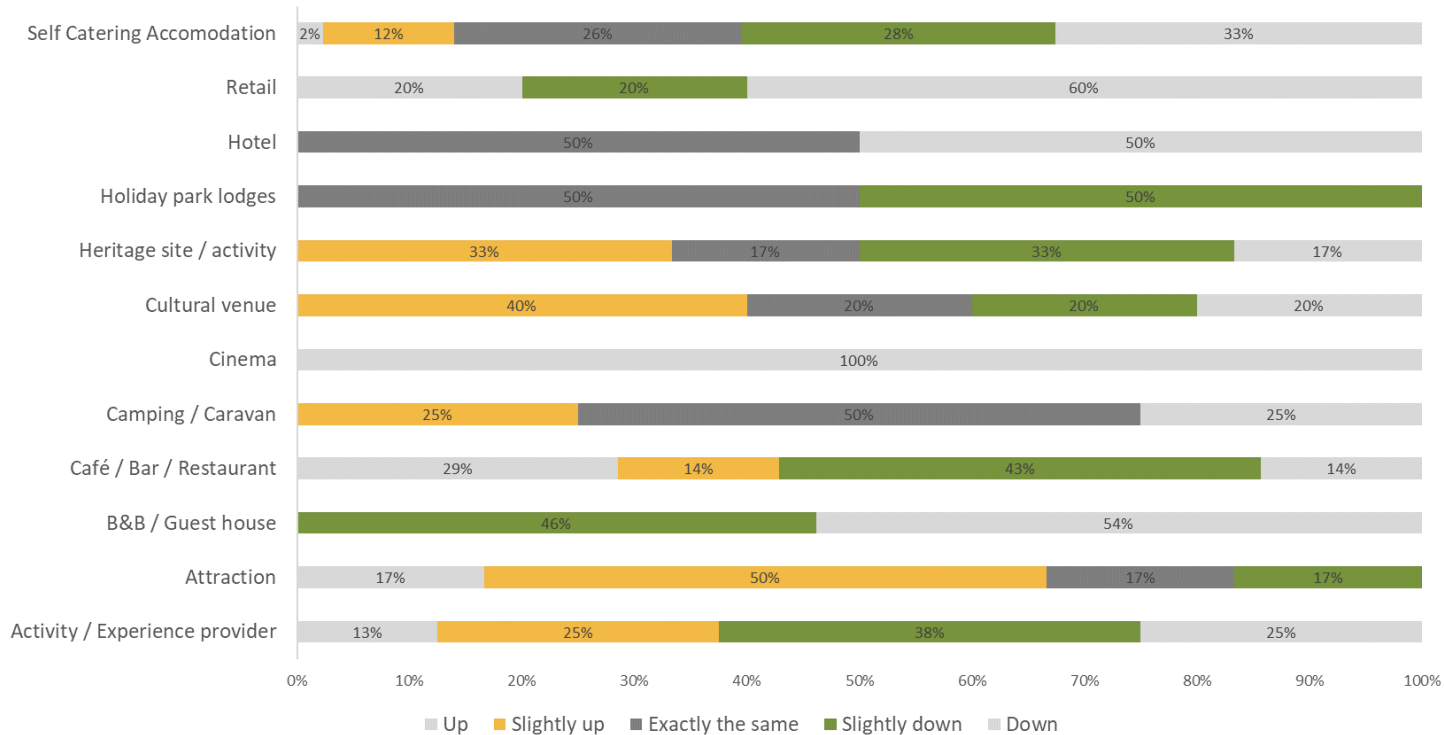
- Cost of living crisis, staff shortages and having to increase prices were also noted by the businesses surveyed when asked what other factors were having an impact on their overall performance.



Key Findings

Business performance

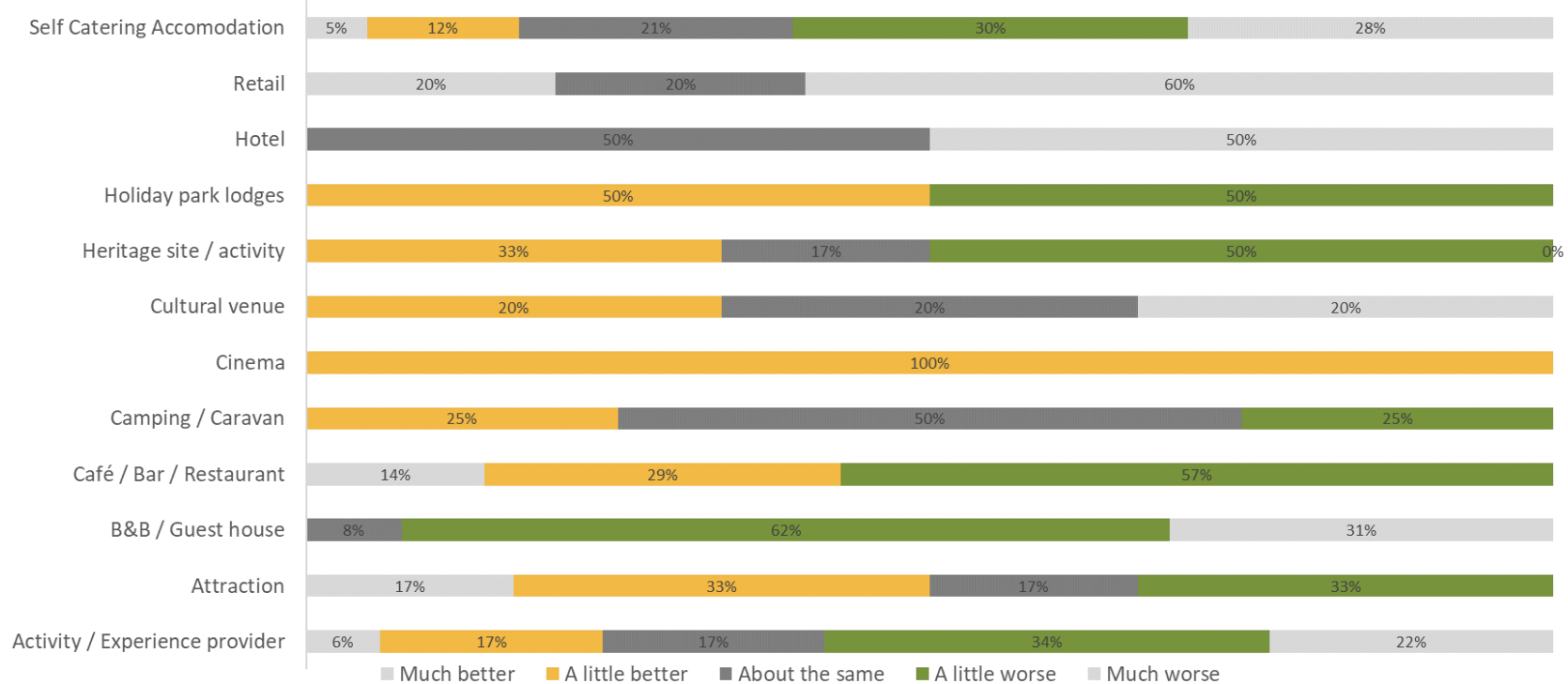
Quarter 1 2023 visitor/guest numbers compared to Quarter 1 2022 by sector



Key Findings

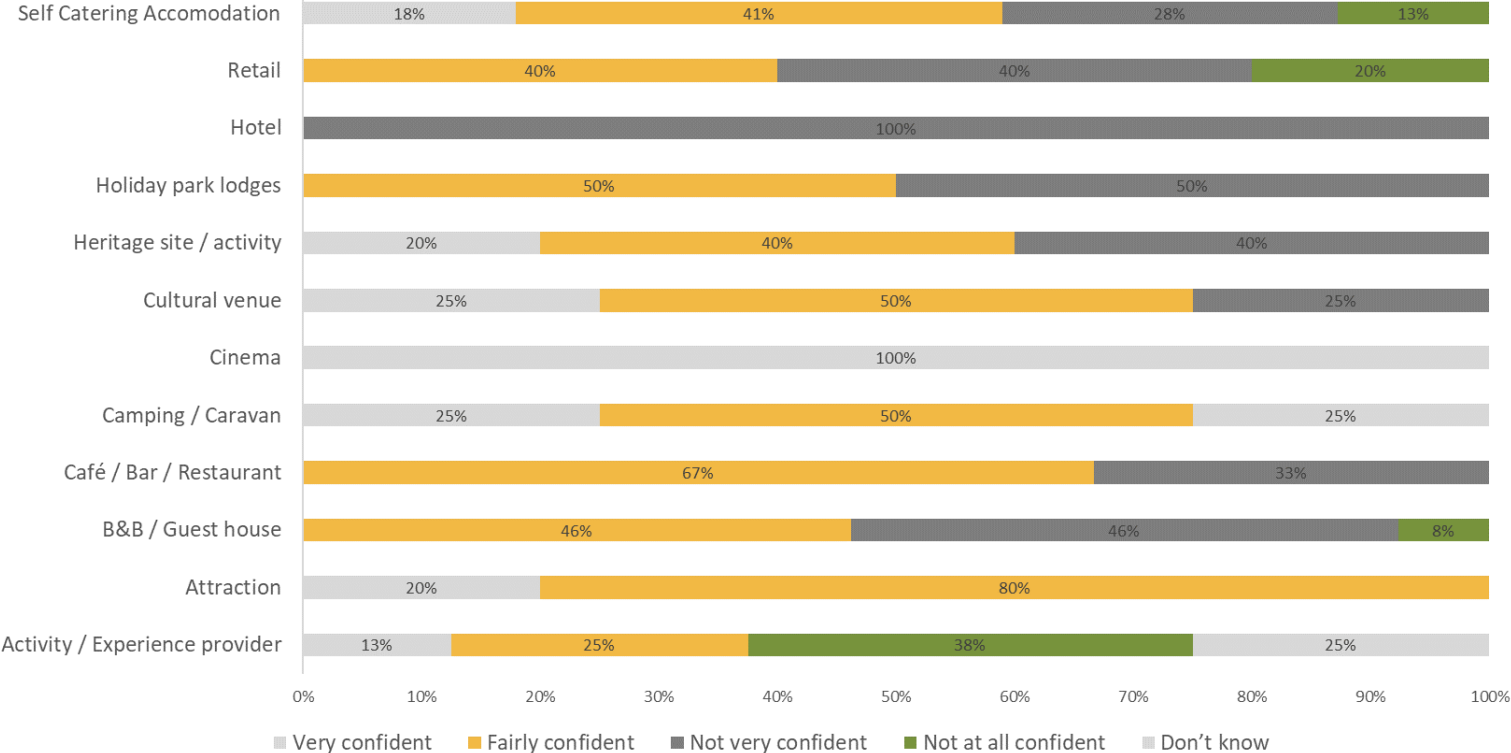
Business performance

Quarter 1 2023 overall business performance compared to Quarter 1 2022 by sector



Key Findings

Business performance Confidence for Q2 2023 by sector



Key Findings

Advanced bookings

Advanced bookings look promising for Spring and early Summer 2023, with confidence declining towards the end of the year.

Please indicate how your advanced bookings/sales are looking for each of the following months:

	Very good	Good	Just OK	Poor	Very poor	Don't Know
April 2023	17%	19%	23%	16%	11%	14%
May 2023	9%	25%	22%	14%	10%	20%
June 2023	8%	29%	16%	15%	13%	19%
July 2023	7%	23%	27%	11%	10%	22%
August 2023	5%	19%	21%	18%	14%	23%
September 2023	4%	13%	25%	14%	20%	24%
October 2023	2%	10%	21%	20%	21%	26%
November 2023	1%	9%	16%	20%	26%	28%
December 2023	2%	8%	16%	19%	23%	32%



Key Findings

Bed nights

82% of accommodation bookings were for between 1 and 4 nights.

Nights stay	%
1 – 2 nights	40%
3 – 4 nights	42%
7 nights	18%
7 + nights	0%

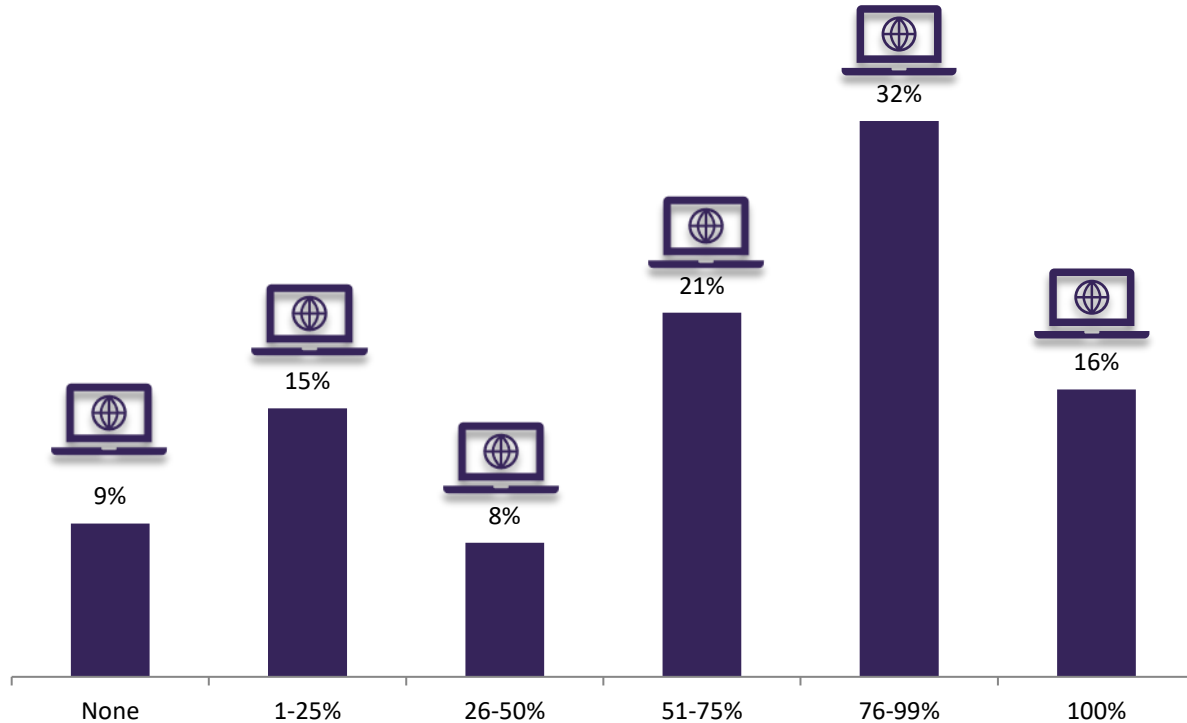
If you are an accommodation provider what is the average length of stay of your guests?



Key Findings

Online booking

69% of businesses stated that over 50% of their bookings were taken online .



Key Findings

Guests & visitors



- Business surveyed stated that **84%** of their visitors/guests were from the UK



- Domestic visitor numbers however were reported to be down with **39%** of the businesses surveyed stating that they were lower than the same quarter last year. Only **13%** of businesses reported that their domestic visitor levels were higher than the same period last year.



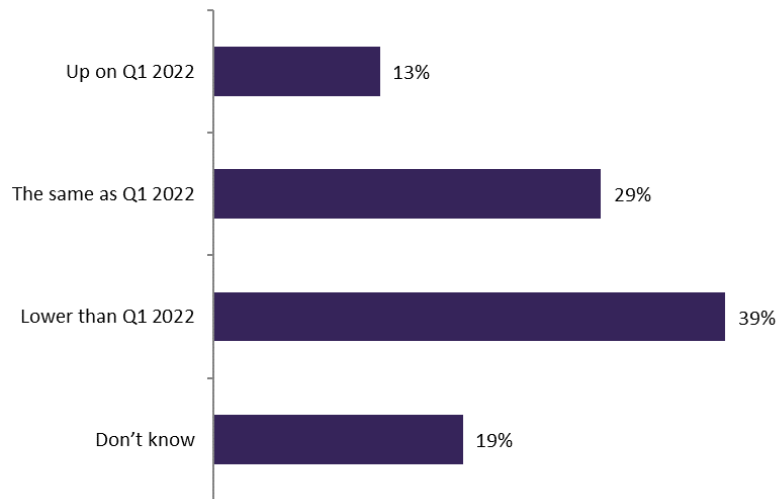
- Confidence in international visitors was low. **25%** of the businesses surveyed stated that the level of international visitors was down compared to the same period last year, and only **5%** saying numbers were up on the same period last year.



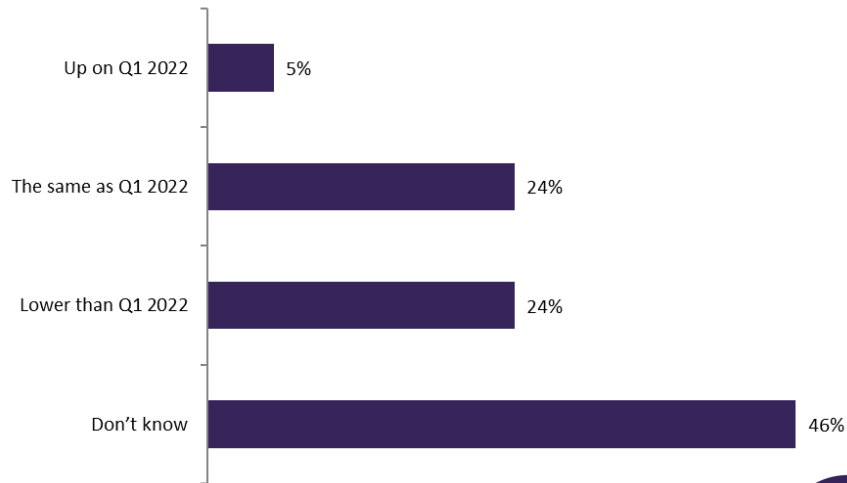
Key Findings

Guests & visitors

Levels of **DOMESTIC** visitors Q1 2023 compared to Q1 2022



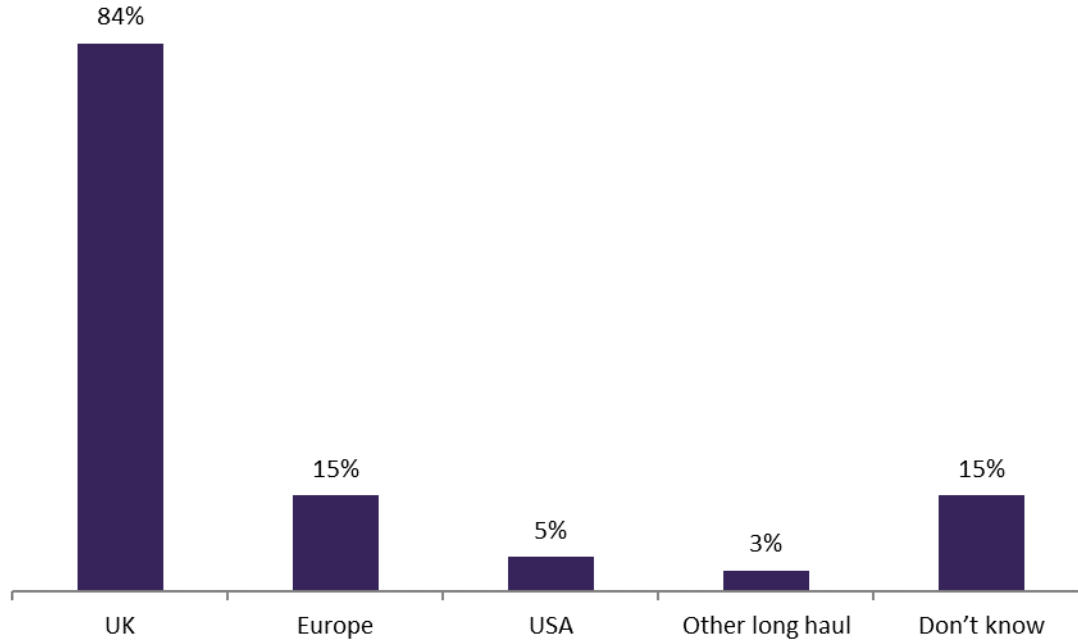
Levels of **INTERNATIONAL** visitors Q1 2023 compared to Q1 2022



Key Findings

Guests & visitors

Breakdown of visitors



Key Findings

Sustainability



- **94%** of visitors/guests travelled to the area in their own car.



- **27%** of businesses surveyed had an electric car charging point. Of the businesses that did not have their own car charging point **73%** knew where the nearest point was that their visitors/guests could access.



- **55%** of the businesses surveyed stated that they recycled on site.



- **55%** of the businesses surveyed said that they were a cycle friendly business.



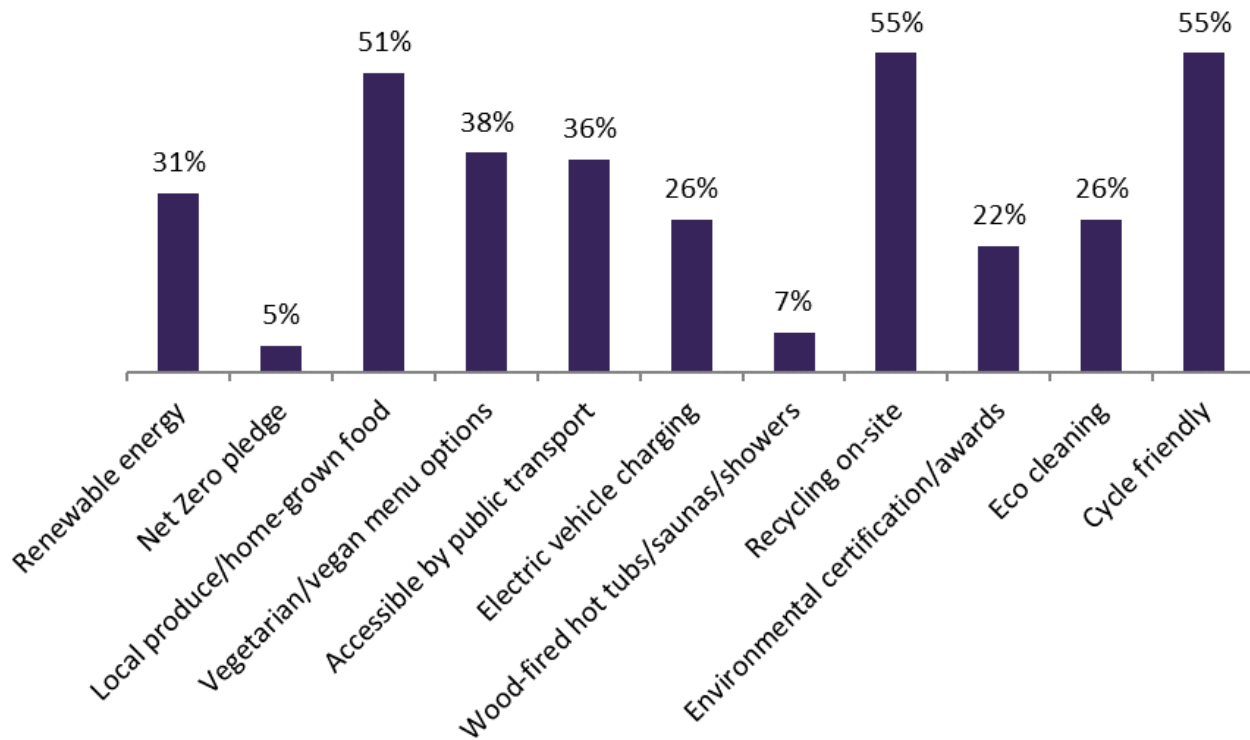
- **53%** of businesses stated that they would like help to become more sustainable.



Key Findings

Sustainability

Sustainability measures implemented by businesses



Key Findings

Accessibility



- **33%** of businesses surveyed say that they promote their business as an accessible business.



- The most common accessibility measure that businesses reported was level access, with **40%** of businesses identifying this.



- Only **6%** of businesses had a hearing loop.



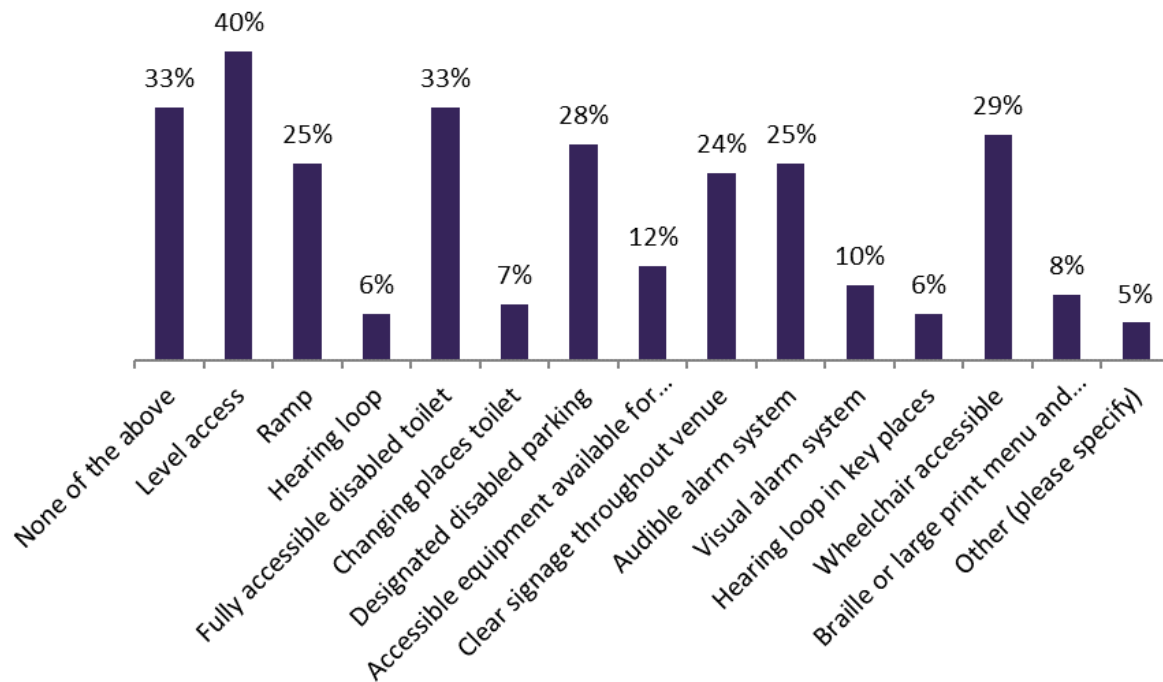
- **36%** of businesses said they would like help to become more accessible.



The respondents:

Accessibility

Accessibility measures implemented by businesses



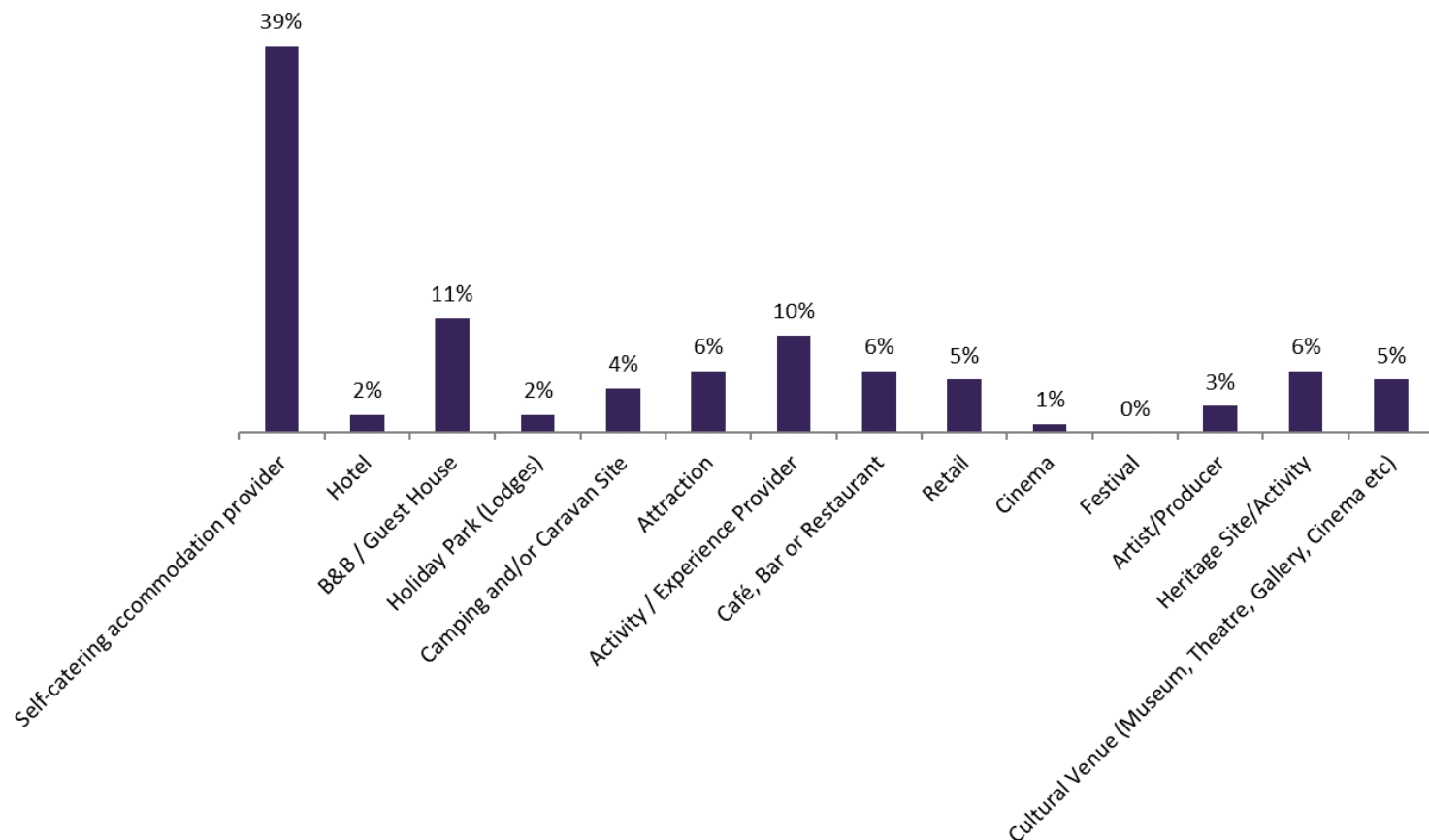


The Data

114 Total respondents

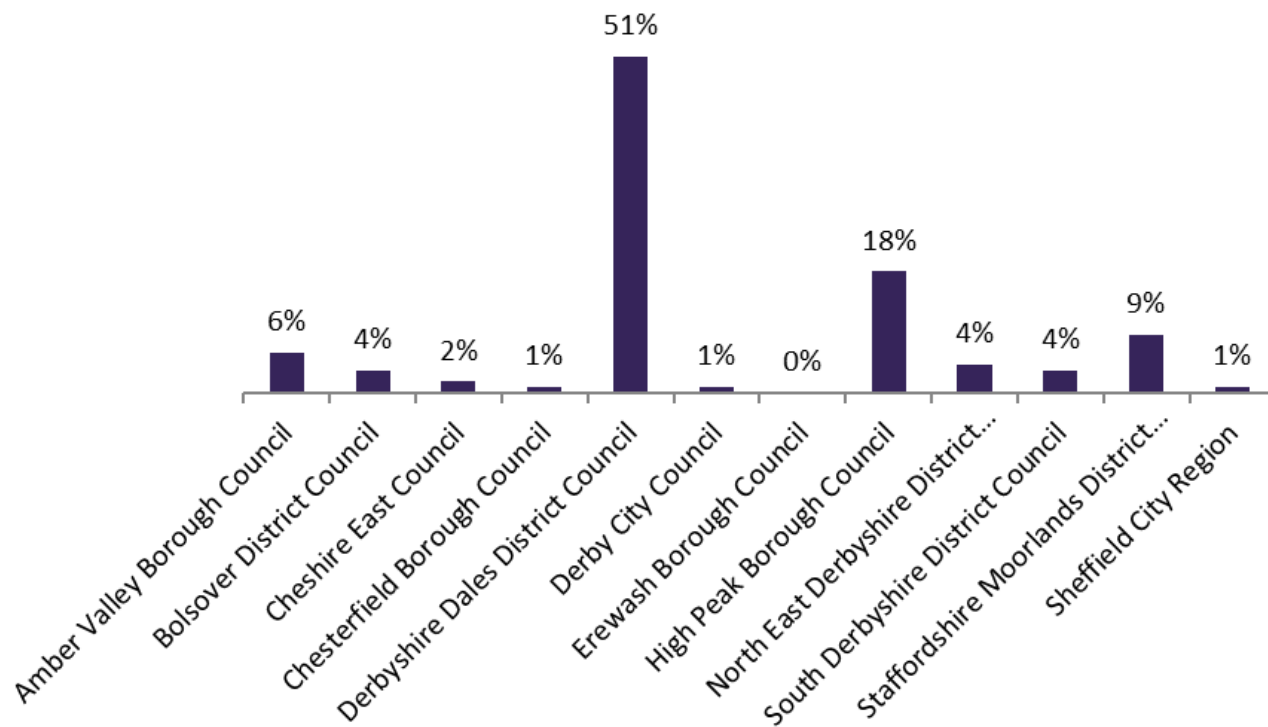
The respondents:

Which of the following best describes your business?



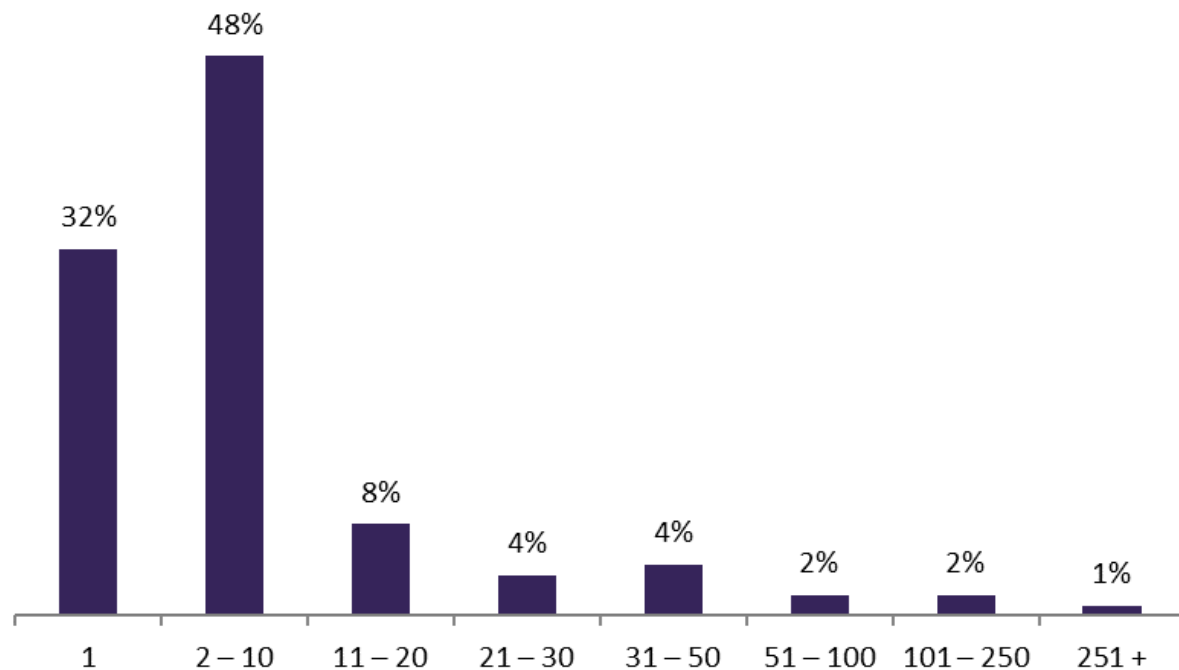
The respondents:

Please indicate which local authority area your business is located in.



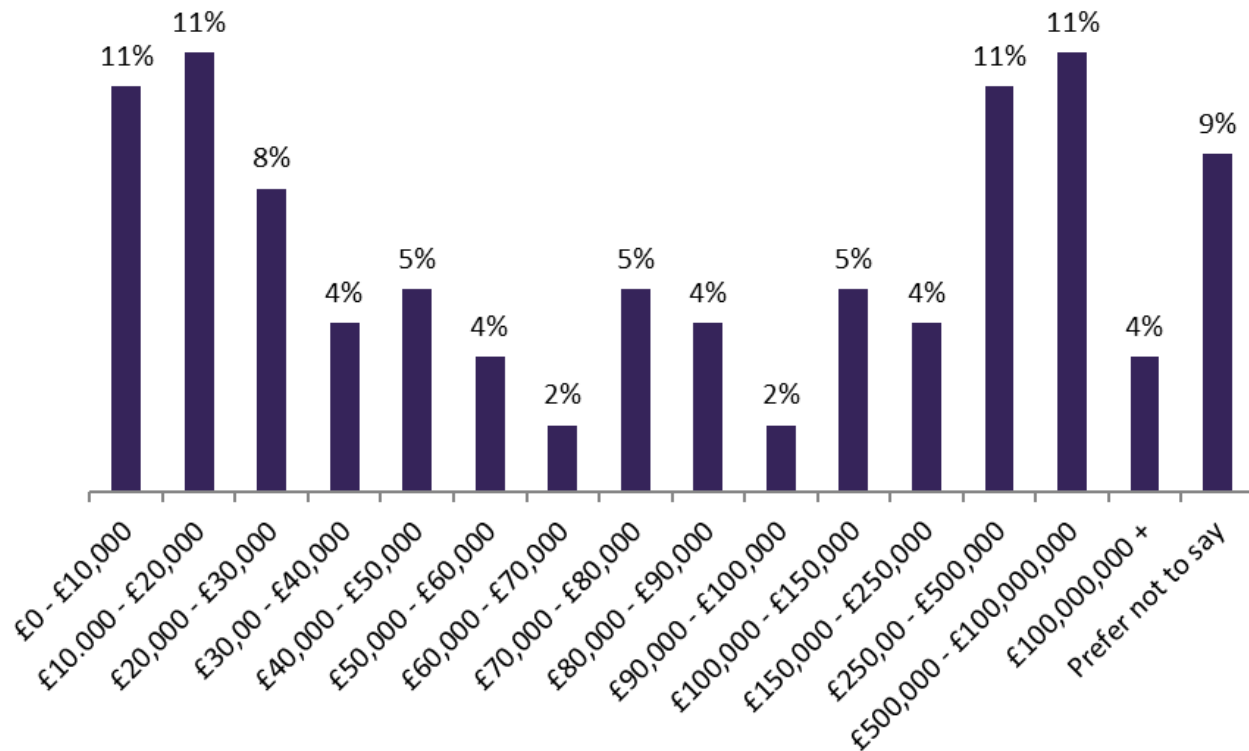
The respondents:

Including yourself, how many people are employed by your business?



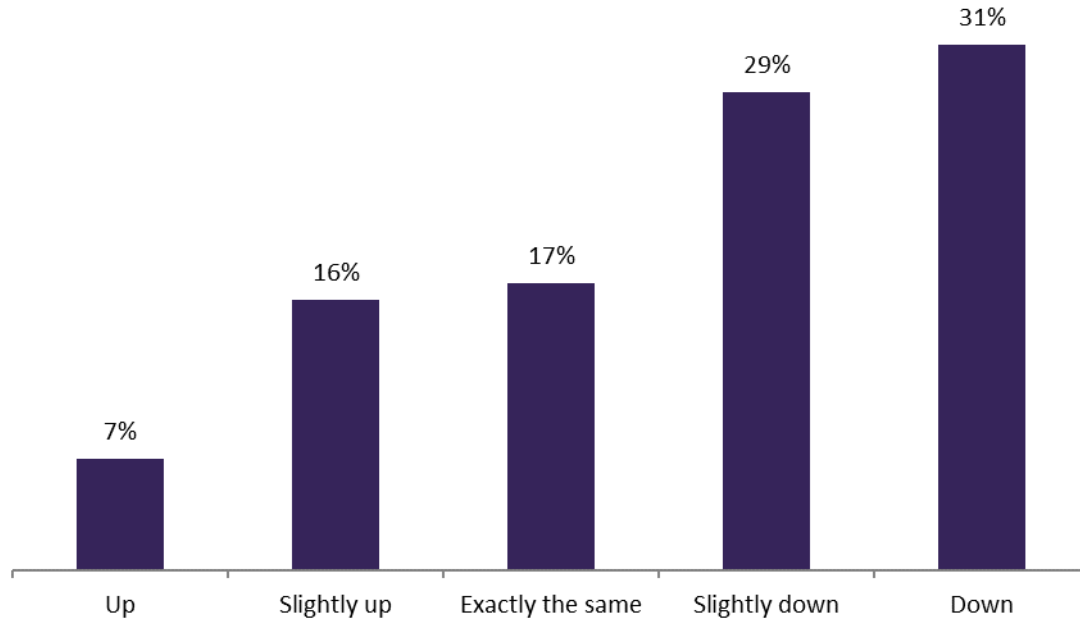
The respondents:

What is your annual turnover?



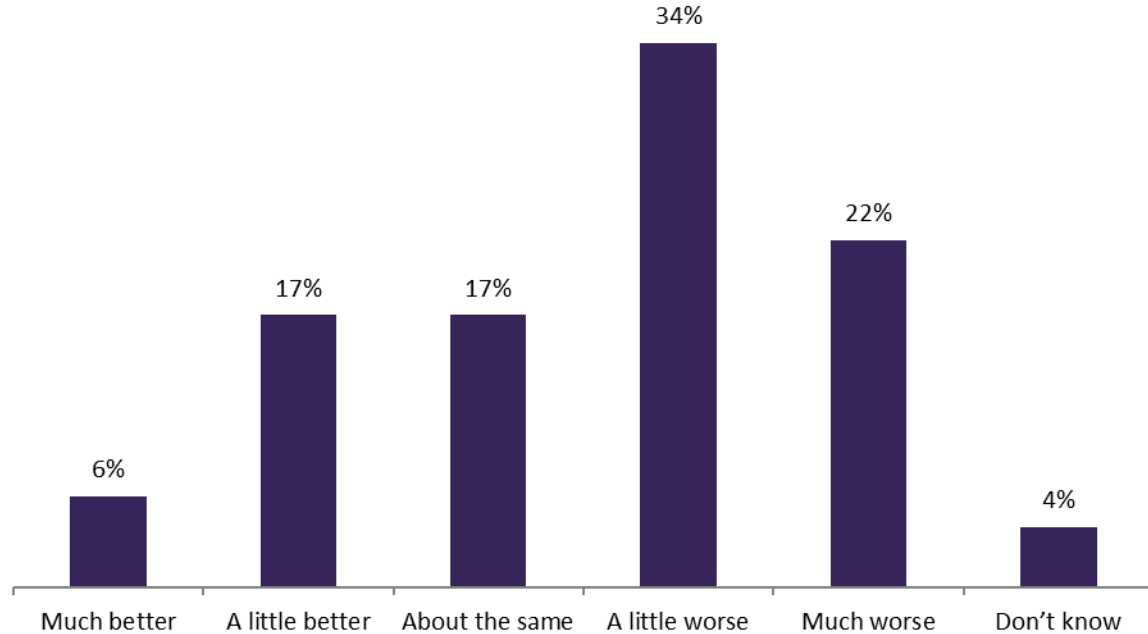
The respondents:

Compared to quarter 1 (January - March) last year, how are your visitor/guest numbers?



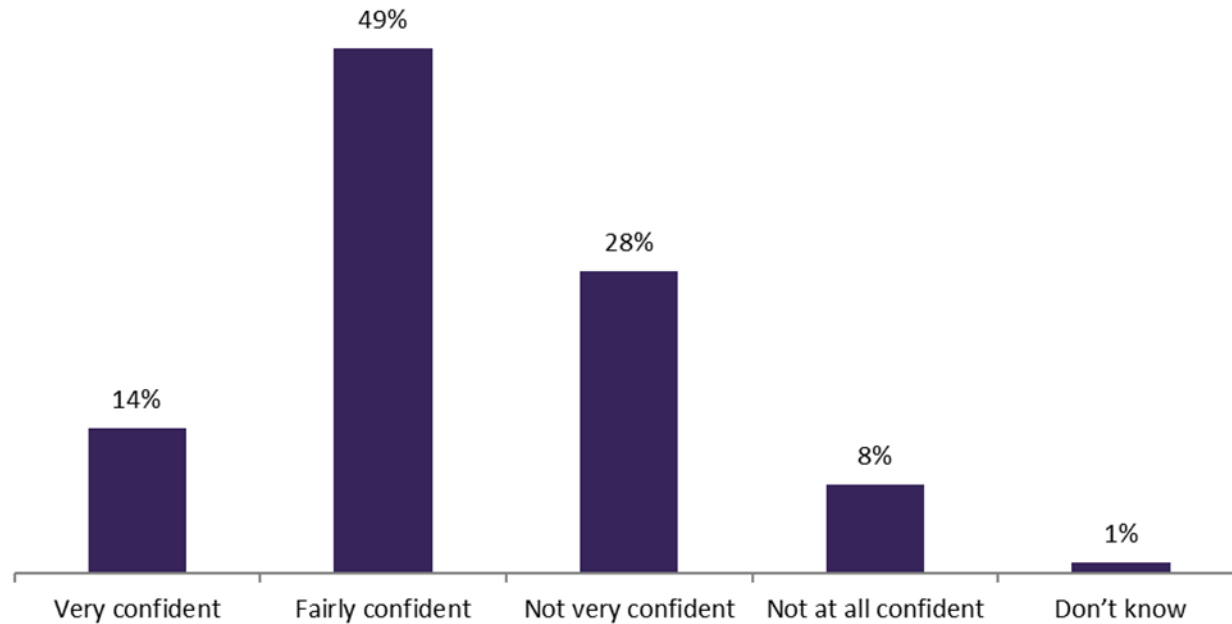
The respondents:

Compared to quarter 1 (January - March) last year, how is your overall business performance?



The respondents:

How confident are you in the performance of your business for the period for quarter 2 (April - June) 2023?



The respondents:

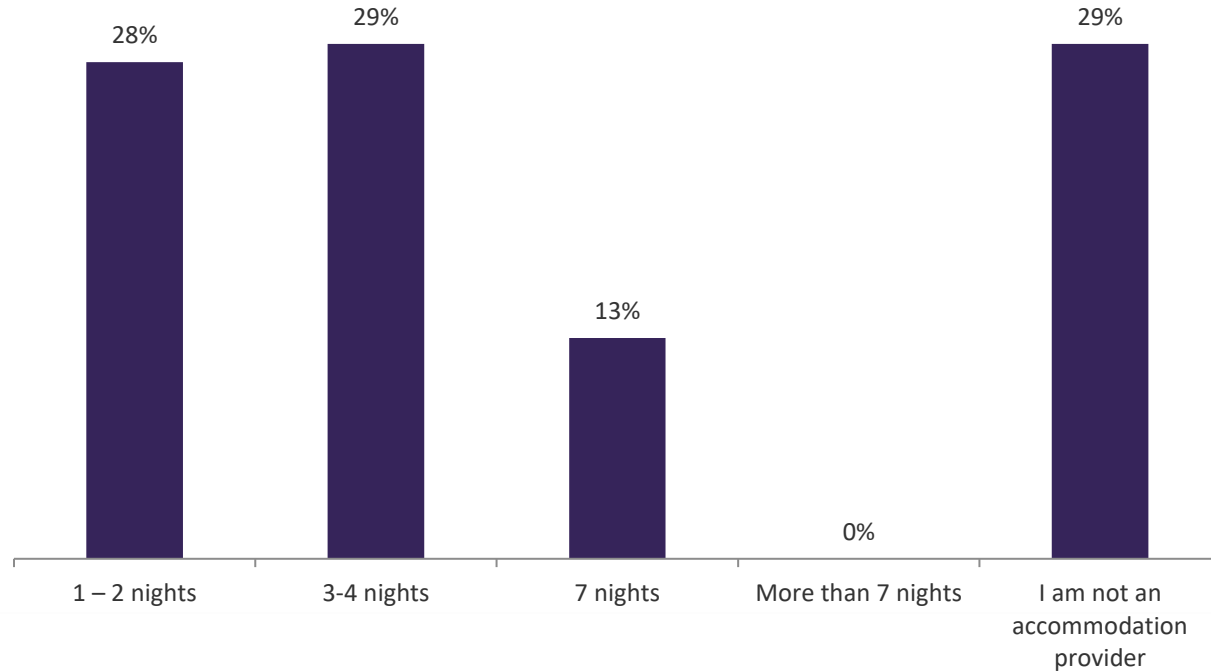
Please indicate how your advanced bookings/sales are looking for each of the following months:

	Very good	Good	Just OK	Poor	Very poor	Don't Know
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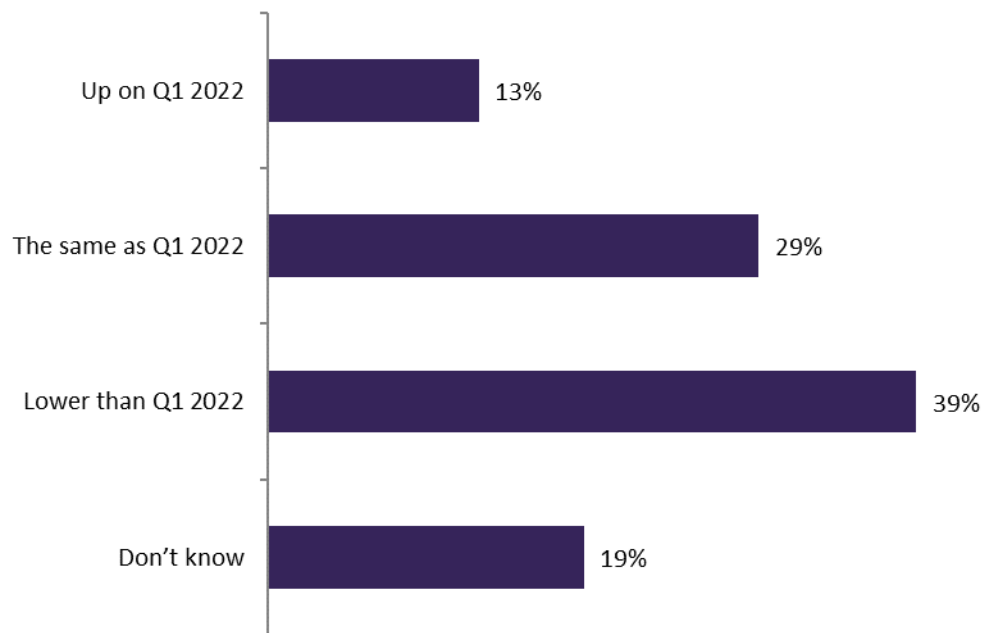
The respondents:

If you are an accommodation provider what is the average length of stay of your guests?



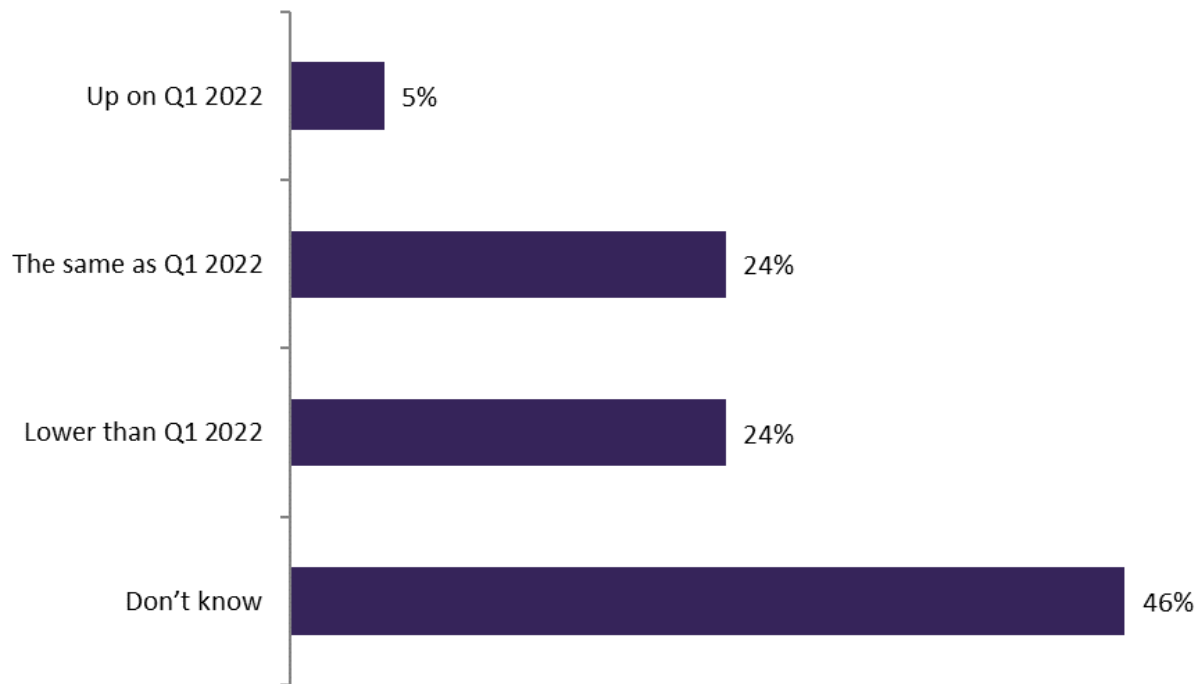
The respondents:

Please tell us how your levels of domestic (UK) guests/visitors in quarter 1 (Q1) (January - March) 2023 as a whole compared with quarter 1 (Q1) (January - March) 2022:



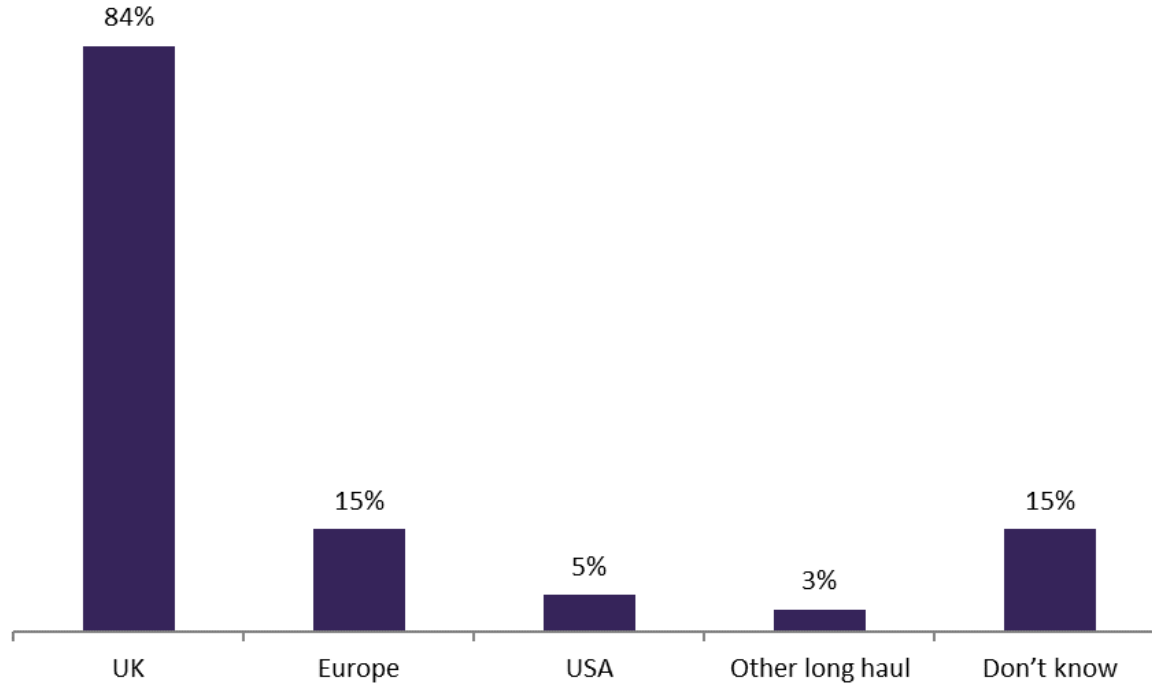
The respondents:

Please tell us how your levels of overseas guests/visitors in quarter 1 (Q1)(January - March) 2023 as a whole compared with quarter 1 (Q1) (January - March) 2022:



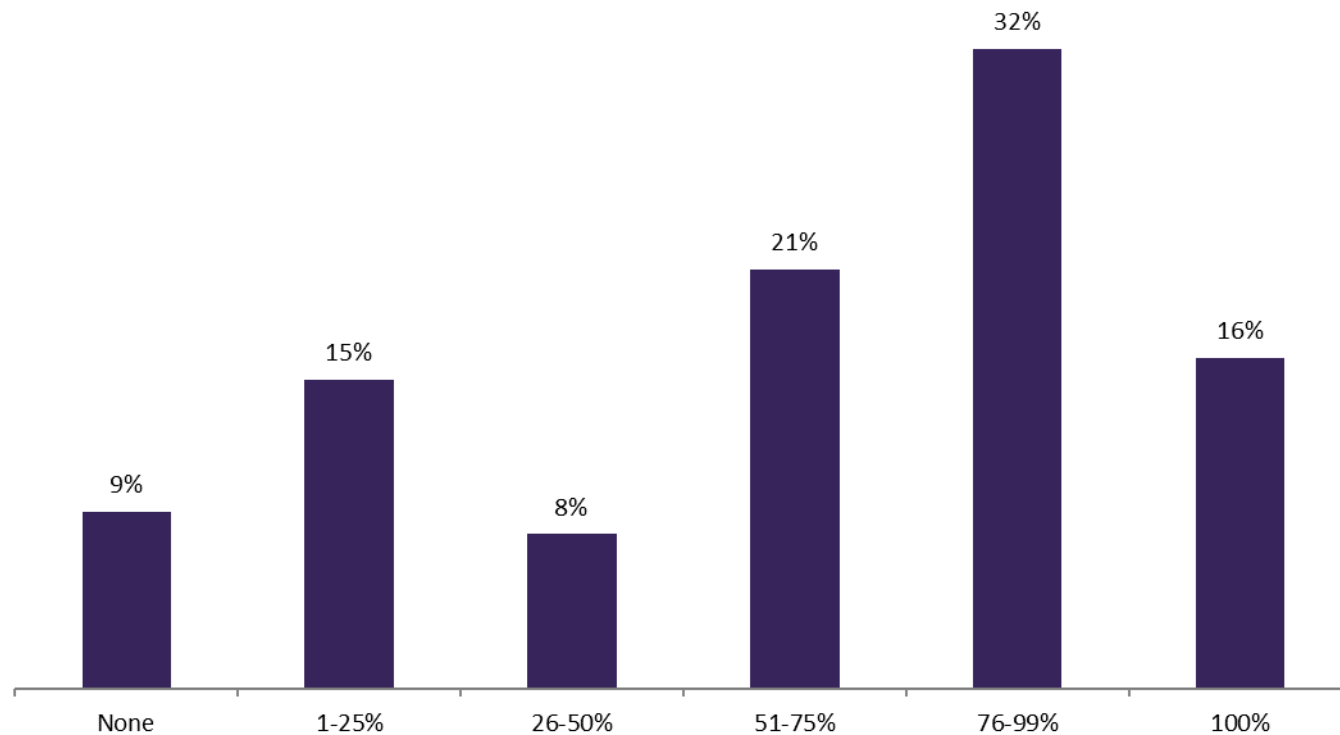
The respondents:

Please tell us where your visitors have travelled from in quarter 1 (January - March) 2023? (Please tick all that apply)



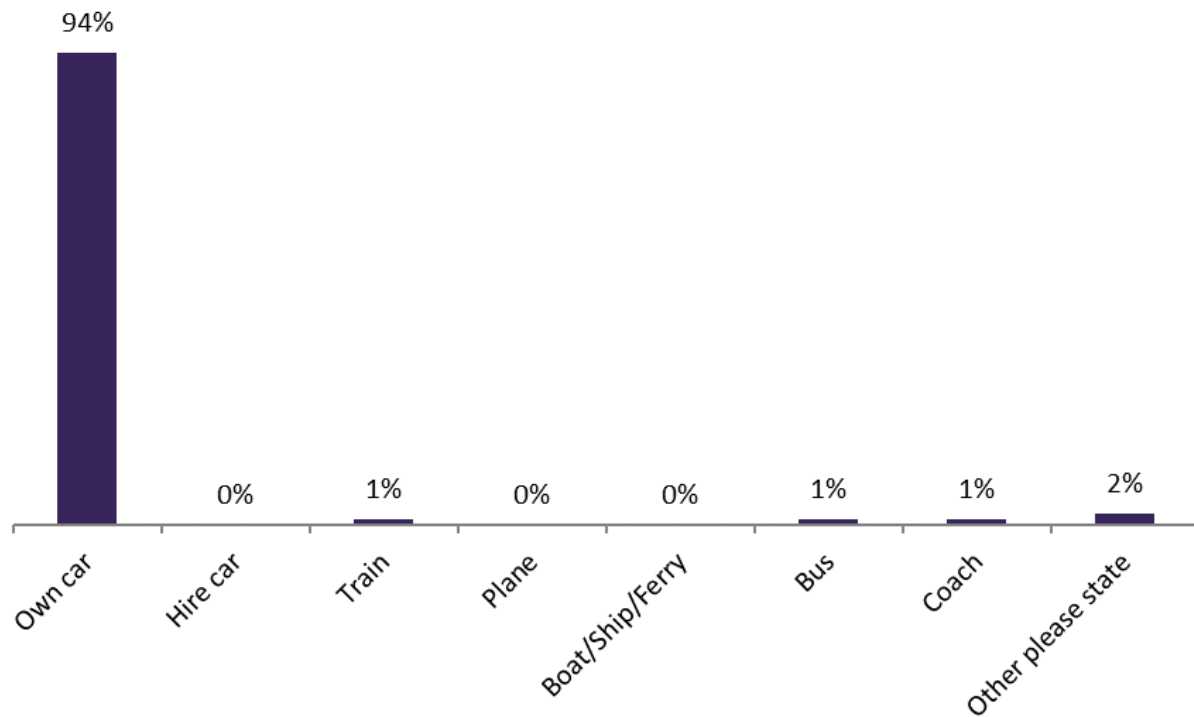
The respondents:

What proportion of your bookings are currently made online?



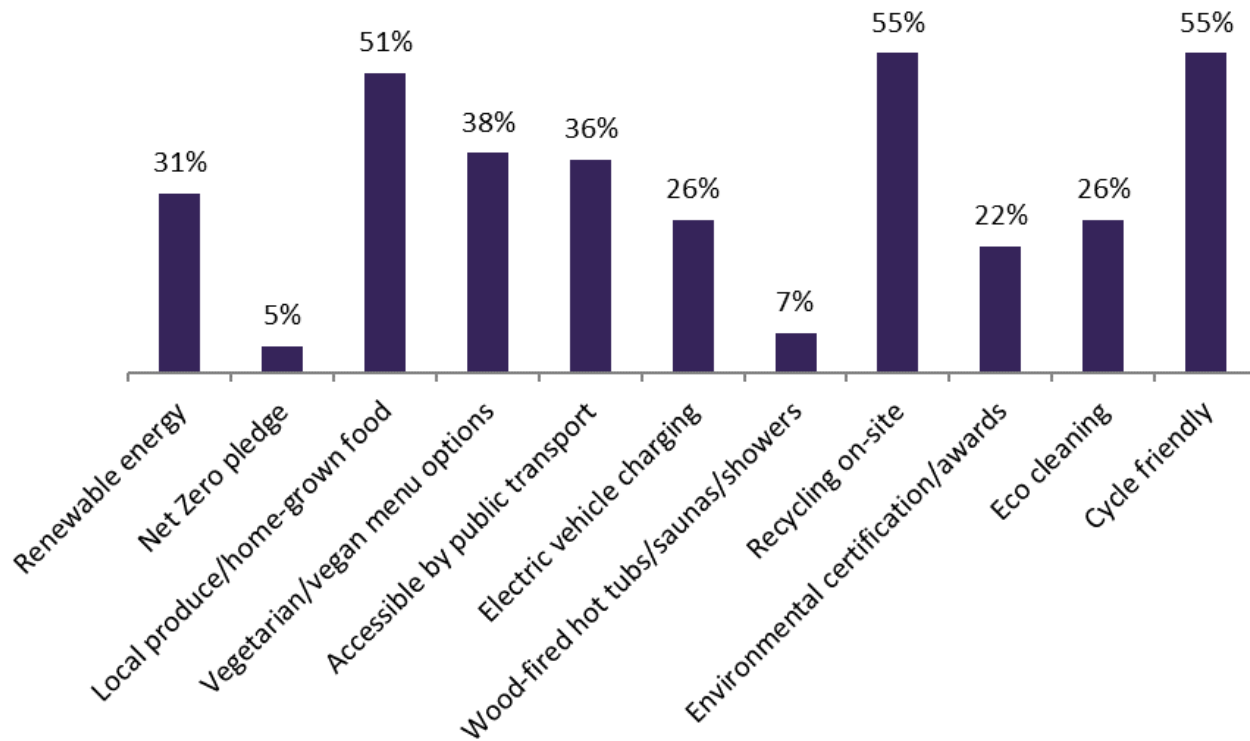
The respondents:

What is the main mode of transport for your visitors?



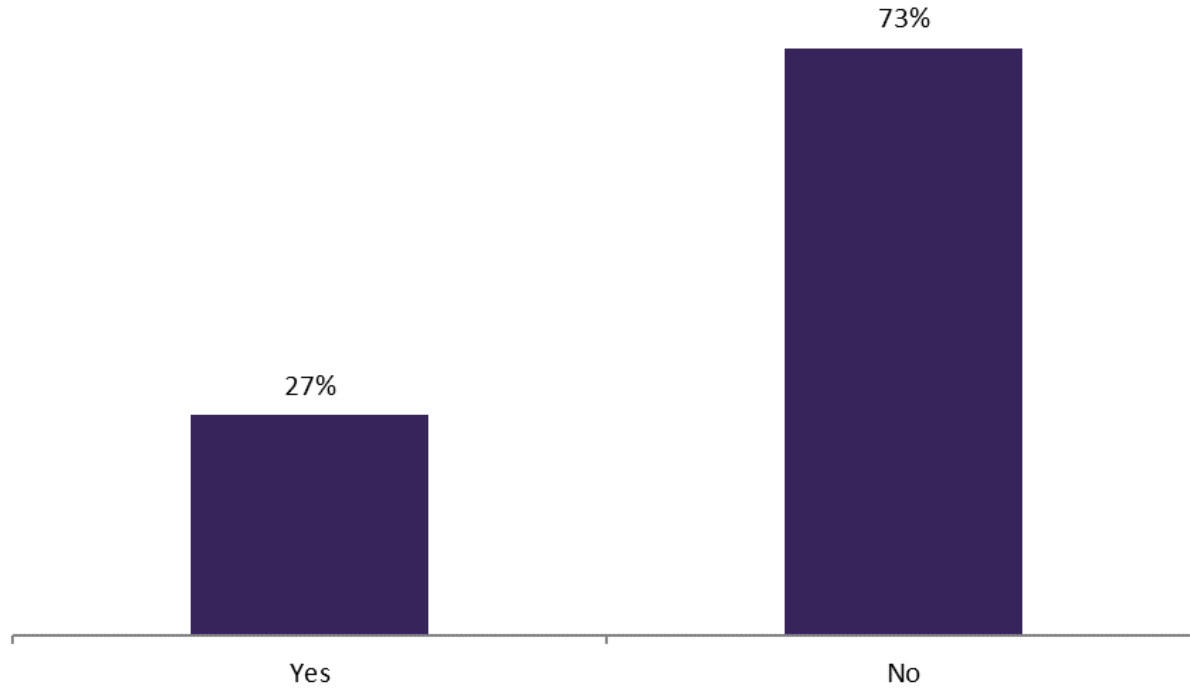
The respondents:

Which of the following have you implemented in your business? (Please tick all that apply)



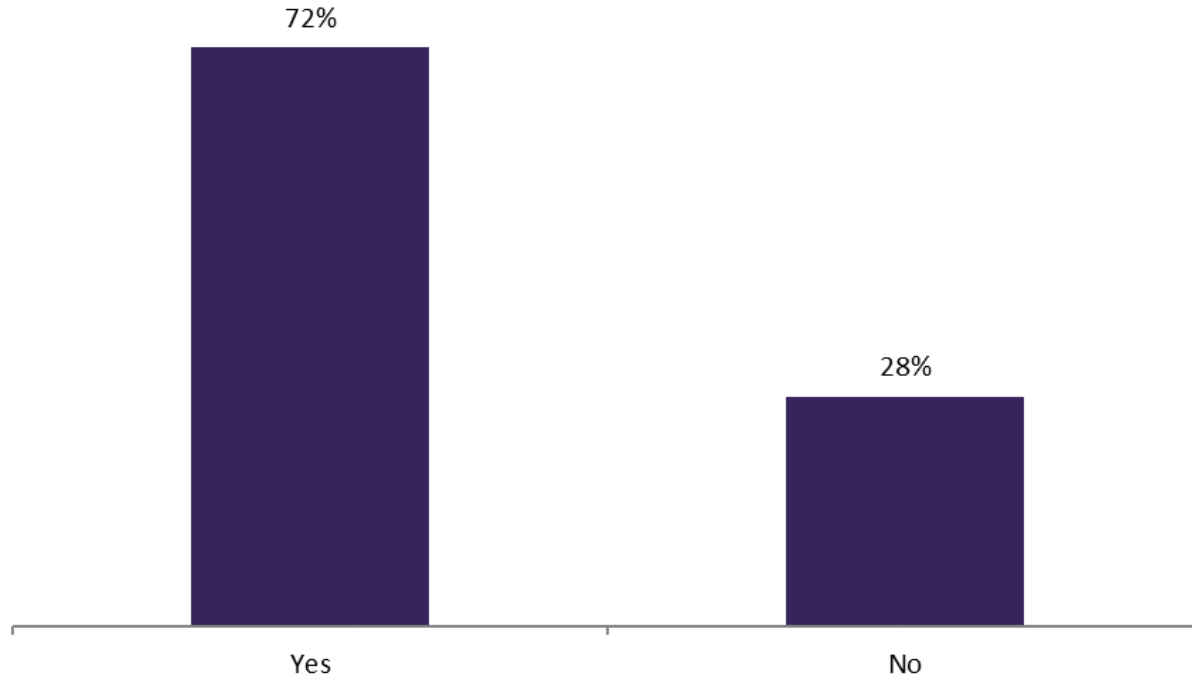
The respondents:

Do you have electric car charging points on site?



The respondents:

Do you know where the nearest electric car charging points that are available for your guests/visitors to use are?

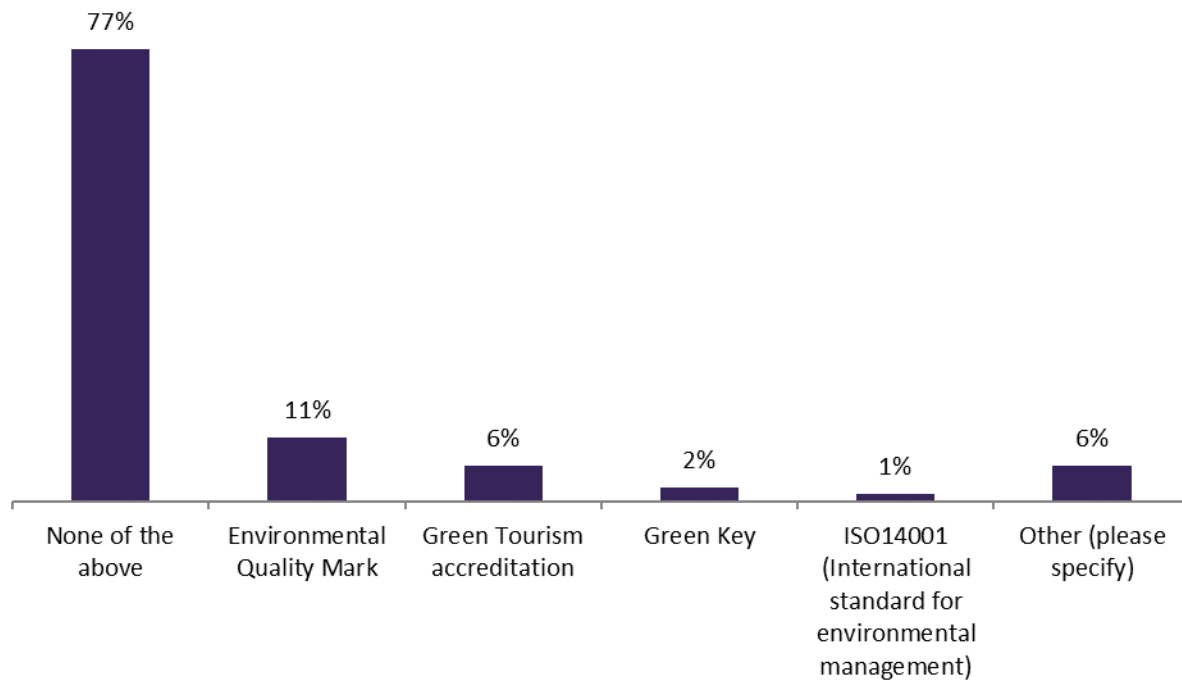


**Only asked if answered no to "Do you have electric car charging points on site?"*



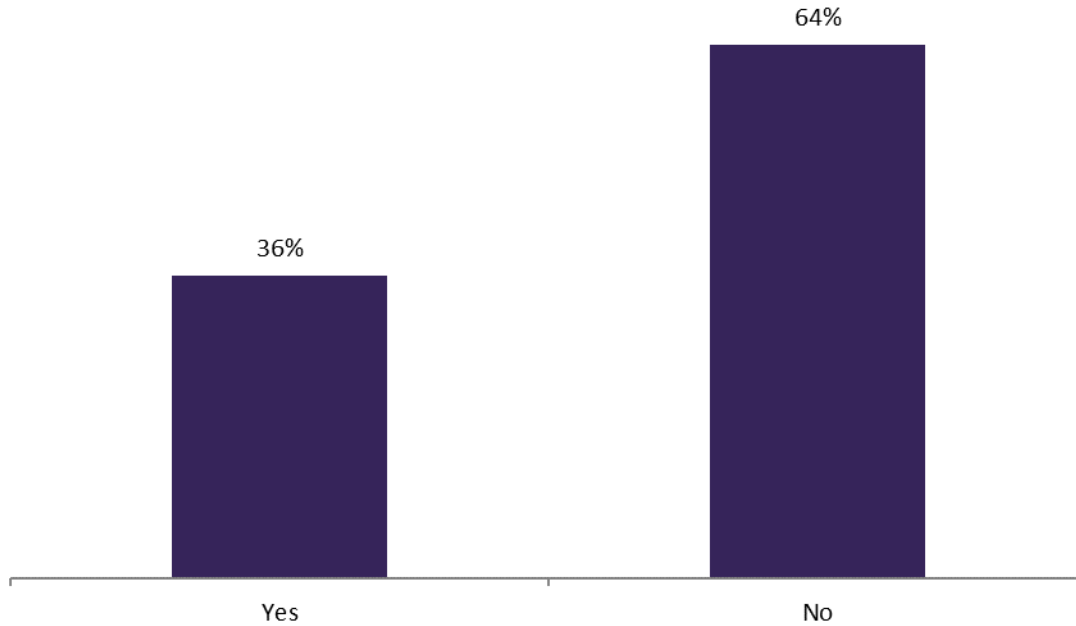
The respondents:

Do you have any of the following sustainability/environmental accreditations? (Please tick all that apply)



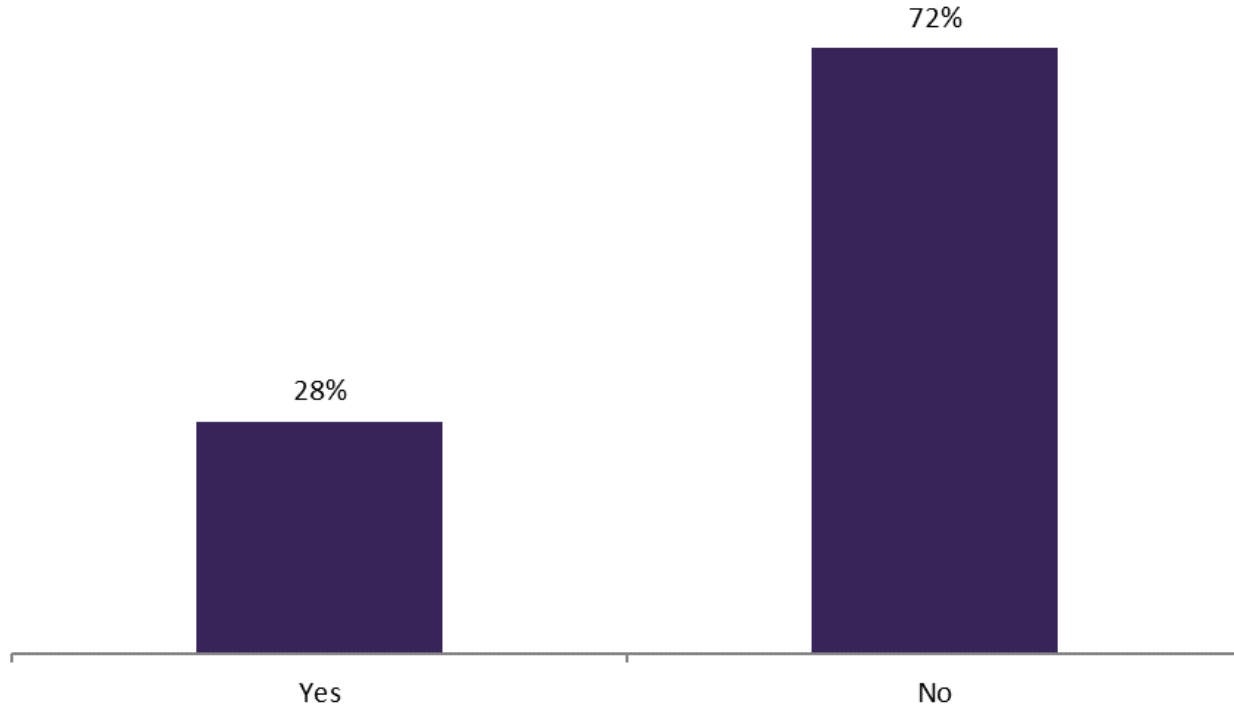
The respondents:

Do you have a sustainable action plan for your business?



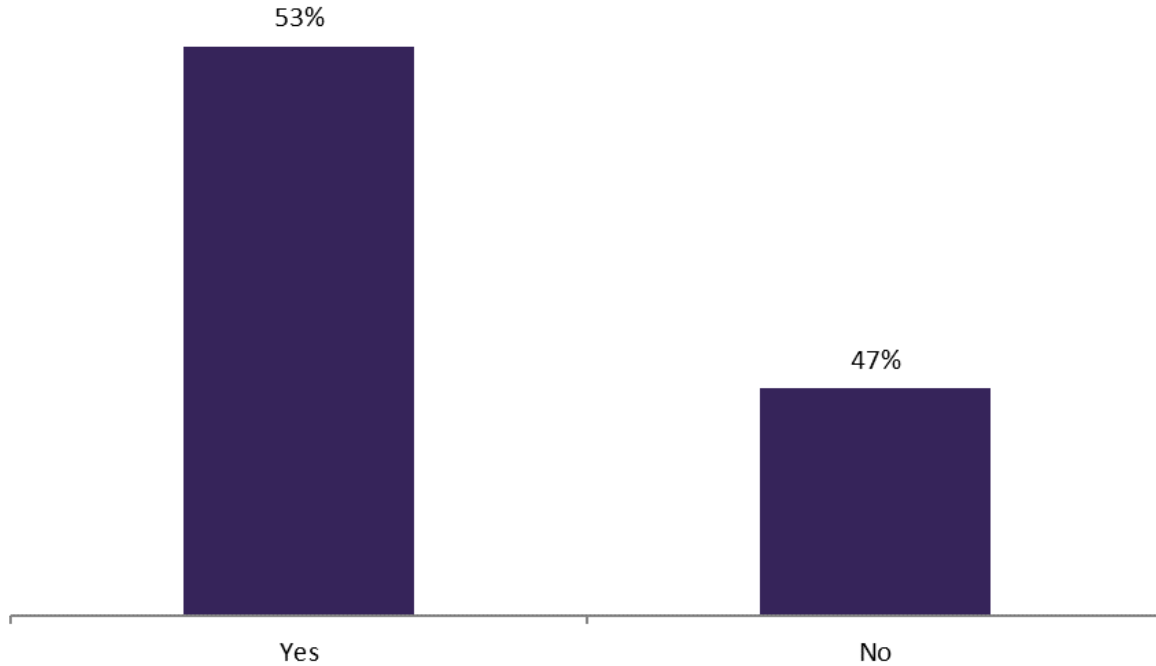
The respondents:

Do you promote yourself as a sustainable business?



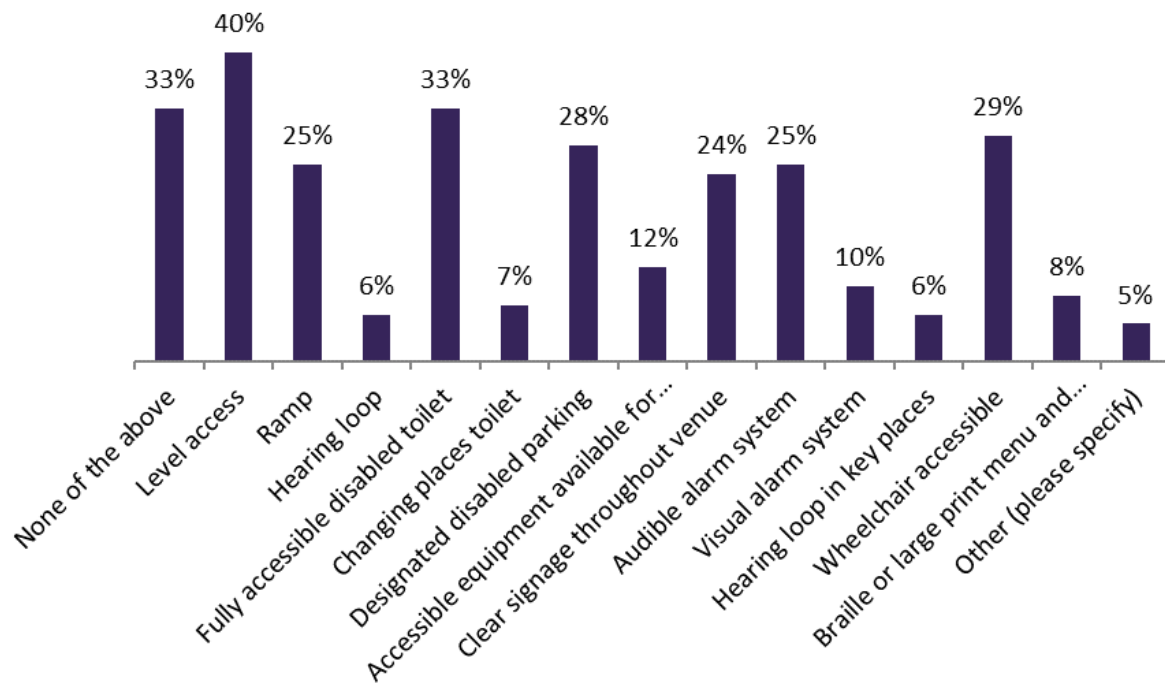
The respondents:

Would you be interested in any help or support to help you create a sustainable business plan or to help promote yourself as a sustainable business?



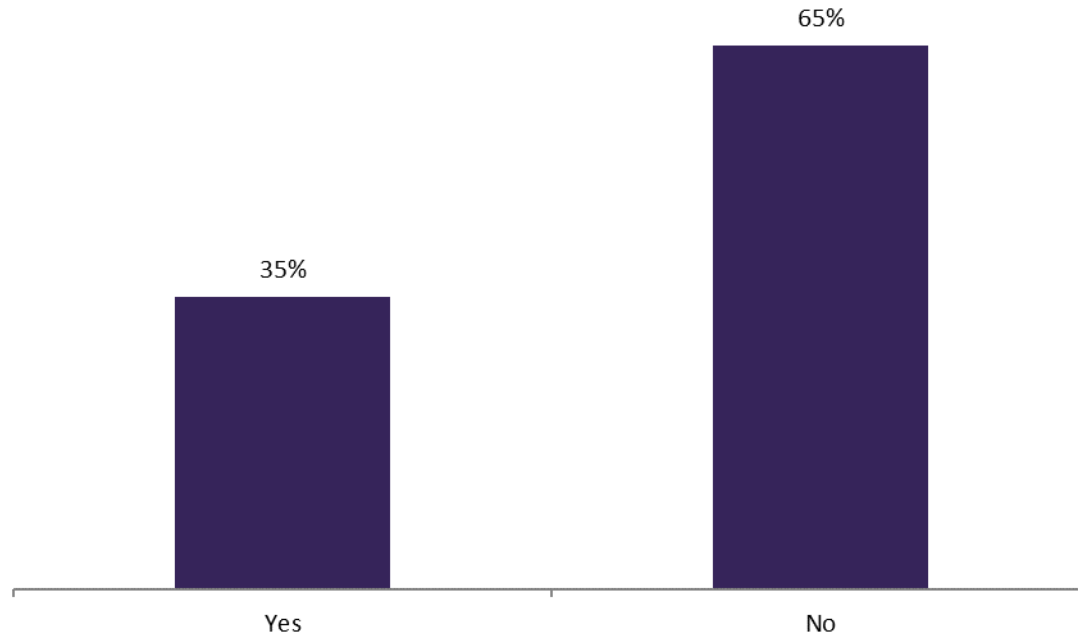
The respondents:

Which of the following have you implemented in your business? (Please tick all that apply)



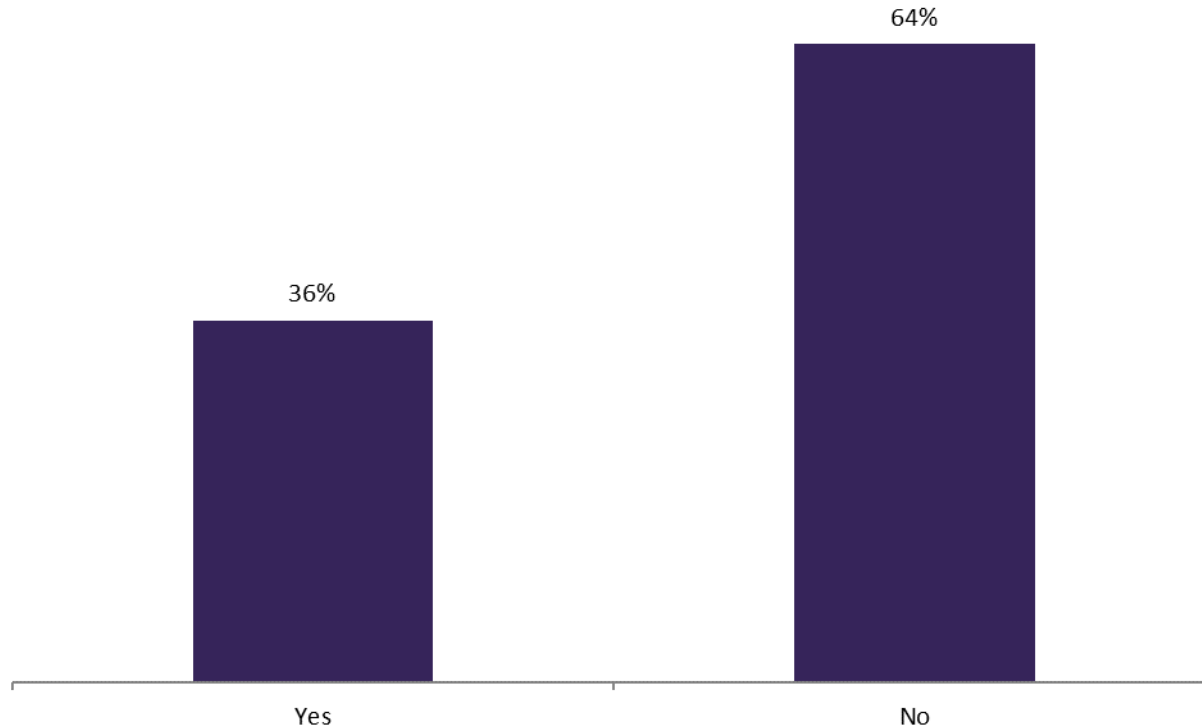
The respondents:

Do you promote yourself as an accessible business?



The respondents:

Would you be interested in any help or support to help you make your business more accessible?



The respondents:

Which of the following is of concern to your business? (Please tick all that apply)

