

JUBILEE BANK HOLIDAY TOURISM PERFORMANCE

WTB SURVEY - June 2002

In order to monitor the tourism performance of the Jubilee Bank Holiday, the WTB Strategy Department commissioned a telephone survey to be conducted among a representative sample of 100 operators in the tourism sector in Wales.

The fieldwork was carried out immediately after the Bank Holiday weekend, on Wednesday the 5th and Thursday 6th June. The questionnaire requested information on the performance of the Bank Holiday period, spare capacity, levels of advance bookings, and tourism operator's confidence about the coming season.

The sample was selected using the WTB database. The sample was randomly selected but with quotas for sector and area in order to ensure representativeness.

Summary:

The findings of the post Jubilee Bank Holiday research show very encouraging results. Almost half of the surveyed operators (49%) had experienced significant increases in business compared to last year, with another 44% reporting static performances. A large majority of the accommodation operators furthermore reported that they were full to capacity this Bank Holiday weekend. The level of advance bookings was also up among an encouragingly high number of accommodation operators. Business confidence among operators was consequently very high with a large majority (87%) being either very or fairly positive about the coming season.

Q1. Type of business

Operators were asked to list the type of business they were involved in. The table below shows the distribution of the sample among business type.

	% of total sample
All serviced	32%
(Hotel / motel / inn)	(11%)
(Guesthouse/B&B)	(21%)
Self-catering flat/house/cottage	30%
Caravan/camping/touring park	20%
Visitor Attraction	18%

Q2. Type of location

The table below shows the distribution of the sample among types of locations. As the table below shows, around half of respondents (53%) were in a countryside or village location, with the sample fairly evenly split between inland and coastal locations.

INLAND		COASTAL	
Countryside/village	25%	Countryside/village	28%
Small town	13%	Small town	19%
Large town/city	5%	Large town/city	10%

In terms of tourism regions, there was a fairly even split between North Wales (27%), Mid Wales (24%), South West Wales (31%) and South East Wales (18%).

Q3 & Q4. Performance of the Bank Holiday period

Operators were asked how the performance of the Bank Holiday period 2002 compared to the same period for the two last years. In theory, operators would be likely to experience an increase from last year where tourism levels were affected by the Foot&Mouth outbreak, but the Bank Holiday period 2000 can usefully be used as a benchmark with which to measure this year's performance.

It should however be kept in mind that the Bank Holiday period 2002 was almost a week later than in 2001 and 2000 due to the Queens Jubilee and that it also included an extra day. Consequently it would be likely to attract more visitors. The actual date of the Jubilee Bank Holiday weekend was Saturday 1st – Tuesday 4th June.

Q3. Performance of the Bank Holiday period 2002 compared to 2001

49% of total respondents reported that they had experienced an increase in business this Bank Holiday period compared to last year. The average increase was 49%.

A small group of 7% of respondents had experienced a decrease in business compared to last year. The average reported decrease was 29%.

44% of the sample reported a static performance year on year.

By sector, the percentage of operators identifying an increase in business year on year was relatively higher for attractions (56%) and caravan parks (55%) compared to the serviced

sector (53%) and especially to the self catering sector (38%). When analysed by area, the highest percentage of operators identifying an increase year on year was found in the South East area, with the lowest percentage of operators identifying an increase in the South West. This latter finding is consistent with the fact that the South West area did relatively better last year during the F&M crisis than the rest of Wales.

Q4. Performance of the Bank Holiday period 2002 compared to 2000

As expected - a lower but still solid percentage of 30% of total respondents reported that they had experienced an increase in business this Bank Holiday period compared to 2000. The average increase was 33%.

3% of respondents had experienced a decrease in business compared to two years ago.

67% of respondents however reported a static performance this year compared to 2000.

By sector, the percentage of operators identifying an increase year on year, was again relatively higher for caravan parks (40%) and attractions (39%) compared to the serviced (28%) and the self catering sector (20%). When analysed by area, the highest percentage of operators identifying an increase year on year was found in the South East area, with the lowest percentage of operators identifying an increase in Mid Wales.

Q5. Spare capacity this Bank Holiday period

The accommodation operators in the sample (82) were asked whether they had had spare capacity this Bank Holiday. A large majority of those (84%) had no spare capacity. 16% had spare capacity and the average spare capacity reported was 36%.

When broken down into accommodation sectors the self-catering sector had a slightly higher degree of occupancy with 90% of both self-catering respondents and Caravan parks reporting that they were full to capacity in the Bank Holiday period. 75% of serviced respondents had no spare capacity this Easter.

When analysed by area, the occupancy was highest in the South West and the North, with 92% and 91% respectively of sampled operators having no spare capacity.

Q6 & Q7. Level of Advance bookings

The accommodation operators in the sample were asked what their level of advance bookings was compared to the last two years.

Q6. Level of Advance bookings this year compared to 2001

51% of accommodation operators reported that they had experienced an increase in advance bookings compared to last year. The average increase was 33%.

Only 7% of accommodation operators in the sample had experienced a decrease in advance bookings compared to last year. The average reported decrease was 42%.

42% of the sample reported a static level of advance bookings year on year.

When analysed by sector, there was a larger percentage of serviced accommodation operators (63%) who had experienced higher levels of advance bookings this year compared to last year, than was the case for the other sectors. In terms of area, the operators in the South West and Mid Wales areas reported relatively higher levels of advance bookings than the other areas.

Q7. Level of Advance bookings this year compared to 2000

42% of accommodation operators reported that they had experienced an increase in advance bookings compared to 2000. The average increase was 31%.

9% of accommodation operators in the sample had experienced a decrease in advance bookings compared to 2000. The average reported decrease was 40%.

50% of the sample reported a static level of advance bookings year on year.

When analysed by sector, there was again a larger percentage of serviced accommodation operators (56%) who had experienced higher levels of advance bookings this year compared to 2000, than was the case for the other sectors. In terms of area, it was operators in the South East Wales area who reported a relatively higher level of advance bookings than the other areas.

Q8. Business confidence

Finally the operators were asked how positive or negative they felt towards the coming season. The large majority 87% were either very or fairly positive with only 6% being negative.

	%
Very positive	58
Fairly positive	29
Nether positive nor negative	7
Fairly negative	5

Very negative

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All in all, the findings of the post Jubilee Bank Holiday research show very encouraging results, with large numbers of operators reporting increases in business performance year on year, little spare capacity over the Holiday weekend, increased levels of advance bookings and a very positive feeling about the coming season among the surveyed operators.

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