



10TH ANNIVERSARY

TOURISM AND LEISURE BUSINESS SURVEY 2016

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INTRODUCTION

I still fear there is a perception that in our counties, tourism just happens.

I know of businesses who adopt this attitude, and effectively grab the shirt tails of those with the critical energy and enthusiasm that drive the sector in Norfolk, Suffolk and Essex.

I am not alone in thinking that government and political parties both central and local could do more to understand the sector. It's not all about the money, but showing support and campaigning for the causes that matter to so many businesses and jobs in our region.

But times are changing. I see more and more businesses working together, locally and regionally, increasing the noise about what a wonderful area we live in, and thus we are able to draw in more and more business.

Within this is the reality that we are not competing with the business next door, or in the town nearby, but the counties of Norfolk, Suffolk and Essex are competing with other counties and regions in the UK, as well as in Europe.

The result: We are getting stronger and louder.

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CHRIS SCARGILL tourism partner with Larking Gowen, chartered accountants and business advisors, finds out how the tourism industry is faring and reflects on this year's data.

Staying positive

So how is 2016 for you?

I guess I am looking now at this week, possibly last week, and what is your view for next month, or the year so far?

We all have a view about our own businesses, but less so about how do I compare to other similar businesses or the sector as a whole?

Sometimes, however good we or the team that is immediately around us are, we can still feel isolated, alone, and unsure as to what is taking place in the wider sector in which we are a crucial part.

It is for this reason that we bring you a network of surveys on a wide range of topics, touching on key areas where you can measure and compare. This could be statistical data on activity, spend or trends, but we also try to share opinion.

So what might we learn from this year's survey?

Some of the interesting aspects have been around the introduction of the National Living Wage (NLW).

So how will these changes show? Will we see a shift in the number of businesses employing staff on zero hour contracts (44% of employers have staff on zero hour contracts) or will we see a reduction in hours worked (35% of staff in our survey on zero hour contracts work 21 hours or more per week)? There might be pay rises – or maybe not – with this year seeing an increase of 6% in staff pay remaining

unchanged.

Many people love discussing politics but it seems the politicians don't love talking about tourism. In our survey, 81% do not believe the government does enough to support tourism and, while the conservatives stand out above other parties, still 57% think that no party stands out, which of course leads into the debate about VAT, where 78% of those surveyed are calling for a reduction.

It would be unfair not to point out, however, that some in the sector do not wish to see a change – 7% this year compared to 10% last year.

The Destination Marketing Organisations (DMOs) and the Visit brands have their work cut out in a world of reducing central support.

Businesses are still understanding the role of a DMO, with 60% of businesses still wondering if they are good news or not – but we have seen an increase in positive endorsement for what they have done with 53% of businesses saying they had promoted our area well in 2015, a rise of 5% on last year.

However, potentially highlighting the unfairness government funding introduces, the Lake District (51%) and Cornwall (53%) were seen as better promoted counties. Haven't they just been handed about £10m each?

With all this change there is plenty to

worry about, with 41% saying they are concerned about the state of the UK economy and 36% about the influence of the weather, although the reality is last year's weather either had no affect on overall business (32%) or a positive influence (32%).

Last year and the start of 2016 saw some terrible events overseas, which will impact overseas travel. It was no shock, therefore, to see a fall of 10% in the number of businesses worrying about cheap European holidays (down from 29% last year) and a 5% fall in the worry over UK VAT rates (down from 25%).

But let's not get down-hearted, 64% of businesses saw turnover increase in 2015, which, for the majority, leads to better profits (53%).

Better still is the confidence for 2016 with 66% expecting increased turnover and 59% anticipating higher profits.

These headlines mask the real positivity as the turnover increases are inflation-beating with 67% seeing increases of 6% or more in 2015 with a similar level of increase expected for 2016.

Tourism is not just about the destinations, but what they have to offer. Food and drink is a growing value and for this reason we have covered it more in 2016 in this publication. Much of our offering is locally-sourced – yet another gem of discovery for those who now visit us in greater numbers.

The two major priorities are converting more of the millions of day trippers to stay visitors and developing the year-round visitor economy. That's the view of one of the region's leading lights in tourism, PETE WATERS, executive director of Visit East Anglia.

Staying power is the answer

The "12-month mindset" is vital for tourism in the region. The 68 million day trippers who visit Norfolk and Suffolk every year need more encouragement to stay, thus increasing spend and fuelling the sector.

"Visit Britain's chief executive Sally Balcombe and tourism minister David Evennett announced a new £40 million Discover England Fund for 2016 to grow the number of overseas visitors to the country, but specifically outside the capital.

"This comes at a time when it was reported a record 35.8 million trips to Britain were made by foreign visitors last year, up 20% on five years ago.

"It's the sixth consecutive year of growth, with visitors spending a record £21.8 billion in 2015. Visitors from the US spent the most. It's our collective challenge to convince people of the merits of East Anglia."

The offer is there, says Pete – good transport links and superb built capital to complement beautiful coast and countryside, rich heritage and history, excellent food and drink, and a wide range of cultural activities and festivals.

"Consumers are booking 'later and shorter', something we can capitalise on.

"Visits Norfolk and Suffolk work independently but also collaboratively under the Visit East Anglia banner.

"I have long been an advocate that the only enmity between Norfolk and Suffolk should be on a football field in the Old Farm derby. Let's remember that we are the north folk and the south folk of the East Angles. Together we helped create England!"

"For the first time, all 14 local authorities, both county councils and the Local Enterprise Partnership (LEP) help fund our activity, which is decided by broad interest marketing panels.

"In the past year, tourist attractions have invested over £12 million in their products. We're the combined sunniest-driest part of the UK, but I'm pleased to say much of that investment has gone on weather-proofing.

"Having tourism support these aims will not only bring more money to the region, but will have the knock-on effect of increasing jobs, moving seasonal work to full-time employment, and give businesses



the confidence to increase skills, pay, marketing and product improvement.

"Our activity includes websites with multi-million audiences, digital communication with a 120,000 consumer database, films that have been seen by more than 2 million people worldwide and last year a London underground poster campaign to promote the final dualling of the A11.

"London will become even more important for tourism in East Anglia in the coming years as £140 billion of infrastructure investment goes into the capital, with a view to growing its population from the current 8.6 to 10 million in the next 20 years. Much of that money is being spent in the east of the capital, where brownfield sites make planning permission less complicated.

"That means an influx of people who will be looking at the map to see which holiday, short break and long weekend destinations are within a quick journey time. And that will be East Anglia. We have completed a successful campaign in the Netherlands with the GREAT UK Challenge Fund and sponsorship from Abellio Greater Anglia and Stena Line.

"All our regional and county activity is about increasing knowledge of the area, creating interest and action, and driving consumers to our tourism stars – our local destinations. Visit East Anglia will always support membership of local DMOs because they are the bedrock of our tourism story. Our activity can amplify those

local messages."

What about the £40 million Discover England Fund and increasing foreign visitors to the UK?

"While full details of the new fund have yet to be finalised, there were some key points for those who may want to apply for campaign money. Activity must coalesce around a regional organisation; be collaborative, involving transport, accommodation and tourism operators; be integrated with travel providers, information, itineraries and bookability; have match-funding; and demonstrate international and domestic tourism benefits.

"Isn't it about time East Anglia pursued a fair share of national tourism promotion cash? Our Netherlands campaign has proven Visit East Anglia can work collaboratively with local stakeholders and with national bodies, the GREAT UK Challenge Fund money enabling us to obtain support from Abellio and Stena and many private sector businesses.

"The campaign was worth £150,000, of which half came from the GREAT UK Challenge Fund. This was a very welcome sum, much appreciated, and enabled us to do what was our first overseas campaign as the region's private sector tourism organisation. It wouldn't have happened without that initial GREAT investment.

"But put into context, before the last election, the North of England and the South West of England were each given £10 million to promote tourism. £10 million EACH – against our £75,000.

"That's why East Anglia should be united in pursuing a bigger tourism cash dividend from a government which recognises the need to inform overseas visitors that the UK's tourism offering actually extends beyond the M25. We also want our fair share of that growing number of overseas visitors to the UK.





'This year will see some exciting new initiatives as Visit Essex evolves into its next phase'

LISA BONE (right)

Lisa Bone, strategic tourism manager at Visit Essex, which is responsible for developing and promoting the visitor economy in the county, said: "We position Essex as a desirable, accessible year-round destination for visitors and residents, with the end goal being to increase the value of tourism to the local economy and to increase business and revenue for our investors and members."

"The value of the industry is currently £2.9 billion. We work closely with Visit England at a national level and have been recognised as an official DMO. This year will see some exciting

new initiatives as Visit Essex evolves into its next phase.

We have launched our new membership scheme which introduces investors, we will build our brand and we will have a new focus on digital marketing which will have our new website at the core.

"Investors and members can benefit from bespoke training, industry research, participation in online and offline thematic marketing campaigns, targeted marketing to specific groups including local residents and the group organisers, high profile press and PR activity, lobbying, and, networking with each other."



Lisa explained that more than 350 tourism businesses in Essex had chosen to be part of Visit Essex and had seen benefits directly from working with the DMO.

"As a not-for-profit organisation everything we do is for and on behalf of our members. We pride ourselves on evolving and developing services that respond to our members' needs."

So how's tourism doing in the New Anglia Local Enterprise Partnership area? Here's Norfolk and Suffolk in numbers . . .

- In 2014 it was worth just shy of £5 billion, employing close to 100,000 people, three quarters of whom were full time employees.
- There were 73 million visitor trips, including around five million staying visits.
- "It's the largest industry sector in this neck of the woods, but made up largely of SMEs and sole traders so difficult to bring together."
- "We look to exceed Visit Britain's tourism growth target, which currently stands at 3%."
- "In 2014, Suffolk's visitor economy grew by 4.3% and Norfolk's by 10.8%. Tourism is the second fastest growing sector in the UK, exceeded only by food and drink."

introducing BECKY AMES



FOOD AND DRINK ON THE MENU

At Larking Gowen, the team has a passion for all aspects of tourism, including food and drink. Suffolk partner BECKY AMES helps a range of food and drink businesses grow and prosper.

In 2014, there were 32 million trips to Suffolk, including 30 million day trips. The total visitor spend was £1.85 billion and 37% of that was on food and drink.

"It's an incredibly important sector both to the individual businesses involved and also to the wider economy of East Anglia, particularly tourism. The sector changes constantly, with increasing levels of expectation among customers and potential customers. We work with like-minded groups, such as Tastes of Anglia and Buy Local, to champion the sector and to nurture local and seasonal food and farming industries."

"We know the food and drink sector is innovative and exciting, with a diverse range of producers and retailers."

"Food tourism has become a real thing. Visitors to the region, whether for the day or longer, are often drawn to events based around food and drink. Festivals showcasing local produce are becoming increasingly popular."

"Food travellers engage in a wide range of activities beyond just eating."

"But travellers need help with their choices, which is why you need a plan of attack. Use of social media to reach those people is so important, and membership of local organisations means visitors will be able to 'find' you online."

"By working together to mutual benefit, the food and drink sector and the tourism industry can maximise on the trend for food tourism."



What I didn't want was an overly tidy environment, so you will find long grass in the summer for the grasshoppers, but the children and the chickens love that.

DESMOND MacCARTHY, WIVETON HALL (pictured)

In a world of ubiquitous identikit high street brands, quirky sells. 'Unique' is a dangerous word because it can be easily challenged – but Wiveton Hall certainly deserves this description, and its returning customer base loves that fact. The business has diversified in several directions in recent years, earning new fans and retaining old.

Branching out



Building a brand in the modern world can be hard.

Competitors' marketing budgets may be sky high compared to yours and their experience of setting up tourism businesses may be long and detailed.

But trust your instincts, be true to your character and ambition, and don't try to be all things to all people.

That pretty much sums up what has happened over the past decade at Wiveton Hall, a Dutch-gabled, Jacobean manor house built in the 1650s on the North Norfolk coast when the area was known for its crucial, thriving trading ports.

As with many gorgeous old properties, the hall, which has a 250-acre farm attached, needed income, because, as owner Desmond McCarthy says: "Love doesn't keep a house like this going forever".

Diversification was the answer. Steps have been taken to go well beyond the traditional pick your own fruit.

The café is the beacon of that

diversification because it is the one which has created the most footfall since it opened in 2006.

Among the rows of raspberries, strawberries, artichokes, broad beans and herbs, the café has garnered a reputation among both Norfolk people and well beyond.

It's trendy and vibrant, yes, with a fabulous vista over the marshes where egrets and harriers inhabit, but it's also more than a little quirky, perhaps haphazard, possibly rickety.

Mix this in with a reputation for simple but beautifully thought out restaurant quality, fresh food with ever changing menus in a colourful café environment, and you finish with a pretty solid offering in terms of marketing away from the standard, off the peg mainstream.

Delia Smith is a fan, Kate Middleton is said to have visited and 2016 sees a BBC documentary called *Normal for Norfolk*, telling the Wiveton Hall story, warts and all.

Diversification has also seen the creation of a shop, which stocks produce from the farm and local artisan items; the introduction of art exhibitions featuring local artists; the letting of the West Wing; the conversion of three estate cottages to holiday lets; and occasional weddings.

"We needed to make an attempt at making some money," said Desmond.

"When you have a small acreage like this, you have to think carefully about where your income comes from. The diversification into tourism grew from there.

"What I didn't want was an overly tidy environment, so you will find long grass in the summer for the grasshoppers, but the children and the chickens love that.

"And you will find woodland that is managed for shooting purposes, which means there is vermin control and undergrowth management, which leads to diverse flora and fauna."

The business faces challenges which many other tourism outfits will recognise.



Staffing a seasonal business can be hard, working out how long the season can be extended away from the core March to October months is not easy.

Weather conditions can pretty much make or break the bottom line across an individual month, even a season – even with outside seating, if it's too hot they tend to go to the beach, too grey with a biting north easterly and they want a roaring pub fire.

But on the right day sitting outside the café with a glass of wine and a view of the marshes – and it's heaven and a reminder of things past, says business manager Kim Coleman.

"The children can run free in a way they so often can't elsewhere and I know we help create really happy memories for all generations.

"Those of us that work here are spurred on by the love of the place, a beautiful property in a wonderful part of the world."



'Never sit still'

That's the message from businessman and farmer Sam Steggles, who has grown the various elements of his goat business over the last six years and is now diversifying into tourism.

Sam supplies farmers' markets, delicatessens and restaurants across East Anglia with goats' cheese, milk, meat and skin care products under the Fielding Cottage brand in South Norfolk.

Sam has expanded from the 'basics' of processing an estimated 150,000 litres of goats milk in 2016 both by chance and design.

He is now using the provenance of his products to help sell the tourism related parts of his business. For example, his Kids Meet Kids weekend, where families have the chance to meet the young goats involved in production, has grown year on year.

It was launched as an afternoon event offering the chance for the village of Honingham, where Fielding Cottage is based, to find out what was happening at the developing business.

It's now a two-day event which attracts hundreds of people and has expanded to more of a mini food and drink festival featuring bouncy castles, the world's largest popcorn wok, facepainting and a beer tent.

And his Goat Shed mini farm shop has just been replaced with a larger unit to help meet the growing demand

for products.

The shop stocks goat products, eggs from Great Ellingham, honey from Dereham, popcorn and birdseed from Bintree and chutneys from Foulsham among others, with products added according to customer request.

Last year the business opened a Camping and Caravan Club certificated location and sold 150 nights over the April to October season to people who, Sam says, enjoyed the peace and quiet, animals and the Goat Shed produce.

This year a shepherd's hut will be added to the site after requests in 2015.

"The business is about much more than farming. It's also about attracting people from near and far to come and fall in love with the products," Sam said. You can never afford to sit still in this type of business.

"People expect quality and new ideas. They are very loyal if you give them that – we have people come to the Goat Shed from all over the place.

"I know of regular customers who come from Cambridge to the St George's whisky distillery at Roudham, have lunch at the Breckland Stag and then come to us for their cheese and lotions."

'The business is about much more than farming. It's also about attracting people from near and far to come and fall in love with the products'

SAM STEGGLES
THE GOAT SHED



The sales points and marketing locations for tourism businesses have changed dramatically over the last 20 years. We all know the headline 'online is king', but it's the detail therein that matters. And the continuous tweaking necessary to stay ahead of the game should be high on business managers' agendas, as DAVID and HEATHER ATTEW, of Deer's Glade caravan and camping park, explain.

It's a virtual reality . . .

Take a quick spin on to the new Deer's Glade website and you'll have a user-friendly, attractive, engaging experience which goes a great distance in immediately selling the brand values of this Norfolk camping, caravanning and glamping site.

Aerial images, high-quality, clean-cut photography and 360 degree virtual tours combine with ease of booking and straightforward navigation.

This doesn't happen by chance.

As the site owner David Attew runs through the reasons behind the choice of website design, content, layering and facilities, it's obvious that a huge amount of time and effort has gone into this website.

And there are excellent statistics to back up the value of taking that time.

The analytics reveal a very important and specific figure. It's possible to measure how many people visit the website once, and

go on to shop around for other camping experiences – but then return to the Deer's Glade site for further investigation and, quite probably, booking.

"We saw that the figures were up, on the same period last year, by between 20% and 40%, after only a few months from the launch of the new site.

"That's a fabulous figure, but of course the figure that makes the real business difference is the value of bookings generated," said David.

"So after firstly seeing the revisit figures, we went to the booking figures and discovered that, for the same period last year, they were up by a massive 64% across the key four week period between Christmas and late January."

When David considered the new website, his ambition was to create easier navigation, make the booking process more

intuitive, tailor the site to improve mobile device usage and ensure its design was 'Google friendly'.

"We certainly feel that we have created a fantastic online experience for both new customers and repeat customers.

"It has upped the game and has clearly engaged people from the off," said David.

"We still get emails and phone calls, but a huge percentage of business now comes directly through the website booking systems and, within that, the mobile device is playing an ever more important role."

One of the results is that David no longer spends the approximately £10,000 per year on paper advertising that he once did.

Apart from the site brochure, which is available in reception to visitors, that area of spend is now zero.



The year-round business as a whole can cater for around 600 people at peak times across three sites – the main Deer's Glade site with its pods, bell tents and shepherd's hut, nearby Muntjac Meadow which features a 200-seater wedding and events marquee plus seasonal camping, and the smaller Deer's Mead at Erpingham which has recently had a full refurbishment to a very high standard and which is for adults only.





A different perspective

Curious people love a different perspective.

And as the average tourism customer grows ever more curious and savvy, new perspectives driven by technology provide a fabulous way to improve business marketing.

Experienced photographer Chris Taylor, who lives in Sheringham on the North Norfolk coast, has expanded into the world of aerial work, allowing marketing and event managers access to aerial video and stills to help sell their wares.

The services are delivered by way of an unmanned aerial vehicle, more commonly known as a drone, and the business ticks all the licensing boxes of UK Civil Aviation Authority certification, Remote Pilot Qualification and full public liability insurance. It's not a business limited to tourism – clients have also included estate agents, Anglian Water, housing developers

and agricultural outfits.

But for tourism, it's often that extra image which catches the eye of the potential client.

"It's about showing the region's amazing tourism businesses from another angle," said Chris.

"For instance I've been photographing the Haste Classic and Supercar event for the last few years, but in 2015 I was asked to add some aerial images. It takes a certain level of confidence to hover a quadcopter 50 metres above £15 million worth of cars but it was worth the result!"



David and Heather Attew from Deer's Glade (above).

A richer visitor experience

While apps have been on the scene for several years, they have often been considered too expensive and without enough clear advantages. But there appears to be a rebirth on the horizon.

Apps are about to make a significant impact and in two years' time will be a major part of day-to-day online searching and user behaviour, especially for the tourism market, says Paul Richmond, an online web marketing expert.

"The perceived barriers to creating apps have changed, particularly in terms of their reduced implementation costs and how useful they can be to both user and provider.

"There was a time when people used to

travel around the world with guide books, maps and various other awkward printed material," said Paul. "But the future, in fact the present for the majority of people, is 'always on', portable and in your pocket in the form of a smartphone or tablet.

"A third of people already have apps to find hotel deals and 85% use their smartphone as part of their holiday experience."

Apps are particularly applicable to tourism, said Paul, because they provide such a good way to offer incentives, loyalty schemes, take bookings, generate proactive notifications, provide guest welcomes and give suggestions of activities. They also integrate with social media and weather forecasts.

"It's about offering a richer visitor experience," he said.

"Tourism enterprises need to adapt to this new technological shift to make sure they are able to reach their customers in the mobile environment and become an active part of their mobile lives.

"Early adopters will be the ones that benefit most and there is no doubt in my mind that this is coming."

"It's my view that in a couple of years, for tourism-related Google searches, those performed on mobile devices will result in half the search results being links to apps, and the other half links to websites."



'A third of people already have apps to find hotel deals and 85% use their smartphone as part of their holiday experience'

PAUL RICHMOND (above)



The traveller is increasingly savvy and their expectations of standards have risen in just the last handful of years. Among the answers is a need for ongoing investment, which must be carefully targeted and made with cost control near the top of the agenda.

That's the message from the top at Ufford Park, a hotel, golf course and spa near Woodbridge in Suffolk.



The devil is in the detail



TARNIA ROBERTSON explains clearly that not only is there a need for many more plug sockets in hotel bedrooms in the modern world, where they are also matters.

They need to be accessible from the bed and from a seated, working position.

It's a small but crucial detail which has been fuelled by several years of careful succession planning at Ufford Park, which included Tarnia taking a step back from her previous marketing role at the hotel for two years and learning as much as possible about both the business itself, but also the competition.

The succession planning was a result of her parents – Colin and Shirley Aldous – wanting to retire from the business, which they did last summer. Tarnia now holds the mantle of managing director and has well laid out plans for the future.

Her parents grew the business in size, finishing with 90 bedrooms, an 18 hole golf course well known in the region for its excellent drainage which means it is usable even in the kind of wet conditions which close other courses, various food and drink options, health club and spa.

The expansion is done for now. What Tarnia wants to do is refine what has been created.

"We launched a five year investment plan

about a year ago which will see us spend in the region of £1 million refurbishing, in phases, both bedrooms and public areas.

"It's not just a case of new furniture, beds and decoration. It's also about new and better lighting, USB ports, plug sockets in the right place and free Wi-Fi with good speed.

"There was a time when we were mainly a golfing hotel. Golfers typically, in the past, would be on the course, eating or at the bar, so the room wasn't as important.

"That's changed, the market is wider and includes plenty of corporate and leisure custom.

"So lots of people want to spend time in their rooms, perhaps working for a couple of hours during a weekend away, so we have to respond to that.

"The days of being able to trade purely on location, views and facilities are gone. Anyone offering accommodation has to supply the whole package of comfort and modernity. We also make sure we are both child and dog friendly."

There are several reasons for the rise in expectations, says Tarnia.

"One is that Premier Inn and Travelodge, which are, if you like, the 'minimum' brands, have raised their standards and their beds are very comfortable, the facilities they offer

are clean and usable. The industry norms have changed.

"If we didn't refurbish, the simple fact is that our price point would have to come down.

"Another reason is TripAdvisor, which can affect your reputation instantly and is now used as a reference point for a large percentage of people booking rooms. Reputation can change much more quickly than in the past if you aren't up to speed with the rest of the industry."

Lastly, Tarnia has positive views about tourism in East Anglia and in particular Suffolk.

"Norfolk has always had the advantage of its long and beautiful coastline.

"But Suffolk is definitely on the up, with Southwold and Adnams a big part of that. Also for us here in the Woodbridge area there is very good access for our visitors to the Woodbridge Tide Mill, Sutton Hoo and lovely countryside.

"The cyclical nature of the hospitality industry has seen us come through a couple of recessions, which have been tough, but those situations have also made us look carefully at what has always been a family business and bring in some more corporate ideas about systems and organisation."



'The days of being able to trade purely on location, views and facilities are gone. Anyone offering accommodation has to supply the whole package of comfort and modernity'

TARNIA ROBERSTON (pictured left)
UFFORD PARK



ALL INCLUSIVE: Ufford Park has upped its game to compete with the 'minimum' brand hotels.



Sweet dreams are made of this

Suenos Guesthouse, on the seafront in Southend-on-Sea, is very much in the higher tier of the bed and breakfast hotel market.

The only 5-star guesthouse in the area and able to charge accordingly, Suenos has the kind of TripAdvisor page that most tourism businesses would kill for.

All tourism businesses will be aware of how harsh a place TripAdvisor can be, sometimes undeservedly.

But of the 263 reviews at the time this article was written, 256 were 5-star 'excellent' and the remaining seven were four-star 'very good'. That's an almost unprecedented percentage hit rate for the sector and puts Suenos at the top of the 23 bed and breakfasts and inns in Southend. Suenos was also winner of the bed and breakfast section of the Essex Tourism and Hospitality Awards last year. There must be reasons for such success beyond a simple desire to create a successful accommodation business.

It's clear from the way she speaks about five-bedroomed Suenos that TERESA JONES, who owns and runs the guesthouse alongside husband Neil, is hugely enthusiastic about every element of the business.

"It is a huge passion for both of us and we have given it our everything since moving in at the end of 2012 and launching a complete renovation and refurbishment of a previous bed and breakfast," said Teresa.



"The vision was to create the kind of place that Neil and I would choose to stay in.

"It's true that the word 'luxury' can be overused, so if you are going to use the word in your marketing then it needs to be true – and that is what we have aimed at.

"If you are, as individuals, your own prospective market, then the hope is you know what your guests are looking for. "We were also fortunate to find a location where the other accommodation providers had not aimed at the luxury market, meaning there was a gap for us to fill."

High-quality linen and furnishings, careful "little touches" with facilities and genuine personal service were three of the key building blocks of the business, added Teresa.

"You're not going to get it absolutely spot on for every single guest, but if you truly adopt the attitude that nothing is too much trouble – and you mean it – then you are on the way to making people's stays special."

The next couple of years will be dedicated to further marketing and raising awareness of the guesthouse, said Teresa.



They're here for the pier



MEET AND GREET: The 2016 team on induction day with existing and new staff together.

Recruitment is a tough business in tourism. The hurdles are multiple – seasonal work, unsociable hours and the price of transport are among the obvious challenges. But sell your business in the right way, interview with intelligence and the staff are out there. One of Norfolk's leading entertainment businesses explains its new policy.

Filling public facing roles has never been a straight-forward process. It can be a time consuming activity.

Advertising jobs, sifting applications, calling for interview, the interviews themselves, making sure departmental managers have their say, deciding, inducting and filling in employment paperwork.

Then there is the ongoing issue of building team ethic, training and retention.

Yet finding the right people is such a vital part of a successful tourism business – the face of any outfit which takes money over the counter for a service has to be friendly,

professional, polite and enthusiastic. Good customer service isn't a coincidence.

One business which thinks it has found a much improved way of recruiting is Cromer Pier.

The pier, which is owned by North Norfolk District Council and operated by Openwide Coastal Ltd, is an iconic landmark, a favourite walk for thousands of visitors to the town and home to one of the most famous lifeboats in the land. Whether anyone has ever added up the economic benefits of crabbing from this structure is unknown, but the pursuit of these crustaceans must be worth significant

sums in total purely in terms of buckets, lines and bait bought locally.

In business terms the pier is crucial to Cromer, providing entertainment to the masses, but also work in its theatre, bar, restaurant, box office, gift shop, ice cream kiosk and tech crew.

More than 30,000 come to the Summer Show at the end of the pier and 12,000 to the Christmas version, with a range of concerts and shows in between.

"Our location is a big challenge," said general manager Jo Artherton.

"It's not like a city, where you have lots of potential employees within walking





distance or a quick and easy bus ride. The catchment area is small."

But this year was all change in the pier's February recruitment push, with a 'speed dating' style open day allowing all department heads to meet with prospective employees, in turn and for a short informal chat.

A bell was rung every three minutes and people moved on to the next 'stop'.

"We needed to shake the process up. Calibre, teamwork skills and enthusiasm were what we were looking for and the new system was aimed at identifying those areas in an efficient manner.

"It worked extremely well, we are very pleased with the people we employed from the process. The numbers we had through the door helped to address the challenges.

"We also sold the job descriptions more carefully, asking people if they wanted to work by the sea, at an award winning business. Say what is good about your business, don't be shy about outlining the positives."

It obviously worked well for Cromer Pier as the event led to 24 new members of staff for the coming season.



Living wage challenges

There is clearly great nervousness across the sector about the National Living Wage (NLW).

Some businesses may be waiting and seeing what the direct impact will be, others are tackling the issue head on in order to get ahead of the game.

The Zoological Society of East Anglia (ZSEA), the charity operating Banham Zoo and Africa Alive, made the decision several months ago when considering 2016 budgets to address one of the largest issues of the NLW. This is the fact all workers aged 25 and over will be due a minimum of £7.20 an hour, while those under 25 will continue to be regulated by the lower National Minimum Wage.

This disparity has already led to suggestions that some employers are making the decision to employ on an age basis, specifically with an aim to reducing their staffing costs.

It has also led to concerns that tourism businesses will find recruitment and retention very difficult up against the likes of supermarkets and other employers.

But ZSEA have removed the problem by paying their 18 to 24 year olds the NLW rates. They have also decided to pay 16 and 17 year olds £5 an hour – the current under 18s minimum rate is £3.87.

"The view is that a hardworking 21 year old deserves to be paid the same as a hardworking 25 year old in the same role," said ZSEA director of operations Martin Dupee (pictured).

"It's a bold decision commercially because it instantly increases our costs.

"But the cold harsh reality is also that staff retention is crucial to our business and we feel to sit strongly in the jobs market place, we need to offer a competitive wage."

Martin said as the government's ambition that the NLW should reach 60% of median earnings by 2020 (or around £9.30) panned out, cost pressure would build on tourism businesses and the need to find efficiencies would increase.

"It will become tougher and tougher and it is my view some businesses could fall by the wayside."



Pictures of the Cromer Pier Summer Show by Al Pulford



Sponsorship showcases diversity

Larking Gowen staff have a close and in-depth understanding of the tourism sector and the challenges businesses face in a modern economy.

Part of this understanding is reflected in the events the chartered accountants and business advisers choose to support through various means, particularly sponsorship.

Here, three of those events are highlighted – the British Art Show, the Essex Festival of Food and Drink and the Suffolk Show.

All will bring profile to the region, attracting tens of thousands of people out of their homes to enjoy the best of art, food, business, the countryside and agriculture.

SHARYN SCOTT, regional business development manager at Larking Gowen, said: "The events here represent extremely well the excellent tourism offer of the region across a broad range of interests.

"The British Art Show is particularly notable because it only tours once every five years and cities have to bid to host it. There are four cities on the tour and

Norwich is one of those.

"The excitement it builds both within the contemporary art world and outside that world is hugely important to the cultural sector, and has knock on effects for other museums and cultural destinations.

"There will be family friendly events to encourage visitors. And advertising campaigns will attract people from London and Cambridge.

"For the Suffolk Show, we have partnered with Tastes of Anglia, whose ambition is to create a regional identity for the food and drink industry.

"The show will create what is effectively a farmers' market and a tourism village, and we will be there, in the village, to meet, greet and discuss tourism in general and the results shown within this brochure.

There will be a similar partnership with Tastes of Anglia at the Essex Festival of Food and Drink, repeated from last year and aimed at allowing businesses and those starting out in these industries easy access the public.

"The intention is particularly to showcase



the products of the cottage industry food and drink sector," said Sharyn.

"Events such as these promise a wonderful day out plus opportunities for the food and drink, tourism and leisure sector to show its best wares."



ESSEX FESTIVAL OF FOOD & DRINK

The family-friendly festival takes place in the beautiful, historic grounds of Cressing Temple Barns halfway between Witham and Braintree over the weekend of July 16 and 17 and is the biggest and best-loved festival in the region.

Alongside music, more than 150 food and drink producers gather to sell their produce including, award-winning beer and spirits from main sponsor Adnams, fabulous local produce and delicious street

food.

The festival also has three cookery demonstration stages hosting celebrity and local chefs. James Martin is back by popular demand on the Sunday and Tom Kerridge will take to the stage on the Saturday.

The sponsorship provides 20 Tastes of Anglia producers an opportunity to showcase their unusual and beautiful products, often for the first time.

www.essexfoodfestival.co.uk

TOP TALENT: Chef James Martin will show his culinary skills on stage at the Essex Festival of Food & Drink.

SUFFOLK SHOW



Suffolk's largest two-day event at Trinity Park showground, just outside Ipswich, is attended by around 86,000 people every year and contributes millions to the county's economy.

The Suffolk Show takes place over two days in the summer half term – June 1 and 2 – showcasing the county's rich agricultural heritage and promoting Suffolk as a tourist destination. For 2016, show organisers have a number of exciting new competitions, displays and attractions in the pipeline as part of an action-packed programme.

www.suffolkshow.co.uk

BRITISH ART SHOW



British Art Show 8, the UK's most ambitious and influential series of exhibitions of British contemporary art, is opening in Norwich on Friday, June 24.

This is the first time the event has been hosted in the East of England.

Norwich University of the Arts (NUA) has been selected as the show's co-partner in Norwich and work will be exhibited in NUA campus buildings on St George's Street and the East Gallery^{NUA} along with Norwich Castle Museum and Art Gallery and The Forum.

www.nua.ac.uk/visit/bas8/

Picture: Mikhail Karikis Children of Unquiet, 2013-14 (production still)
© the artist.

Pedal power to the fore

Small tweaks to businesses could help raise the region's reputation as a cycling destination.

That's the view of NEIL TURNER (pictured), who runs bike shops, hire and social enterprises.

He believes a growing trend among professional people in the 30 to 50 year old bracket, who want to cycle as an activity rather than competitively, could benefit his home county of Norfolk and much of East Anglia.

He has put the Tour de Broads event firmly on the map, growing from 500 participants in 2013 to an anticipated 3,000-plus this August.

Neil also has a bold vision for the Scottow Enterprise Park at former RAF Coltishall, with a project called PedalPark, which would offer traffic-free cycle racing.

"We have quiet roads, stunning scenery

and lots of different terrain, but we aren't actually very far from large towns and cities.

"It's an ideal place to cycle and the success of the Tour de Broads shows that.

"And the type of people who tend to be involved – those with professional jobs who want to get out for weekends and do something active – means there is potential for the local economy."

Being more bike friendly, like the Olive Branch café at Tunstead, near Wroxham, which actually markets itself as a cycle café and is a popular stop off for cyclists, would help build a feeling across the region which would encourage more business, added Neil.

"We need to be welcoming and provide the services cyclists need, whether that be parts, servicing, easy and secure places to leave your bike."



Looking to the future



A wide range of sponsoring partners have helped in the creation of this year's Tourism Business Survey. Here representatives of those sponsors explain how they see the sector at the outset of 2016 and which directions businesses might consider taking as they seek to successfully carve their niches in their chosen areas. Our experts discuss a range of issues, from staffing costs to investment.



ADNAMS. SOUTHWOLD

The world's best female cyclists will go under starters orders for this year's Women's Tour at the "home" of Adnams when the first stage kicks off from Southwold.

The 2016 tour will take place from June 15-19, forming a part of the new UCI Women's World Tour, the leading worldwide series of races for professional women cyclists.

Adnams are principal stage partners for the opening stage, which will see cyclists travel 123km from Southwold to Norwich. Their support is based on a desire to boost tourism in East Anglia and a commitment to diversity.

"We have been long standing sponsors of the men's race – The Tour of Britain – and when the Women's Tour was originated in 2014, we jumped at the chance to sponsor it too," said marketing director EMMA HIBBERT. "We love cycling because it's inclusive. Anyone can do it, whether you ride an old secondhand bike or you have a state-of-the-art bike. Every quality cycle ride is rewarded with food and a pint, which is where we fit in."

"The route for 2016 looks fantastic and we are delighted to be hosting the prestigious Grand Depart from Southwold. We are working with other businesses in the town to ensure these elite cyclists receive a warm welcome and enthusiastic send off."

She added that both the Tour of Britain and the Women's Tour have helped to elevate East Anglia on the national and international stage.

"The events generate a considerable boost to the local economy and actively increase tourism across the region," she said. "The Women's Tour brings our values to life and we are proud to be part of it."

LLOYDS BANK



Credibility, passion and drive are three of the crucial factors which people need if they want to go into, or expand within, the tourism sector.

That is the view of MARK AITCHISON, small and medium sized enterprises relationship manager at Lloyds Banking Group. Based in Suffolk, Mark helps businesses find investment finance. He also cites resilience, immersion in the sector through networking and research, plus good websites as other key needs on the road to success.

"Of course you need the business plan, cash flow projections, the clarity of what you are trying to achieve, knowledge of what your target market is and the figures to back that all up. You also need to have a view about where you might be in two, three, five years time and an understanding of the structures behind the business.

"But it is also very important to understand that this is not an industry for the half hearted. The finance is out there for those who can show acumen and passion."

One business Mark has worked with is Mollett's Farm, which provides six luxury cottages and studios on the Suffolk coast near Aldeburgh. Finance through Lloyds has helped develop the site.

Run by Richard and Sasha Ayres, the business has added an extra, popular string to its bow by building with disabled access very much in mind.

"The Ayres are a fine example of impressive individuals with the enthusiasm and vision needed to pursue the type of business they have chosen," said Mark.

Richard said: "Going through the necessary processes meant we thought ever more closely about the most effective parts of the business."

The tourism sector features an enormous range of risk.

At one end of the scale is a small, seasonal restaurant which will have some low level risks in its kitchen.

At the other end, large visitor attractions with tens of thousands of visitors, perhaps taking part in physical activity alongside other members of the public, will need to spend many hours understanding the risks and training their staff.

Insurance solutions for addressing these two scenarios, and everything in between, don't easily fall off a shelf.

This is where a business like Hugh J Boswell comes in, with its expertise of supplying commercial insurance and risk management solutions to East Anglian and national businesses.

"It's a very diverse area of work," said head of community development RACHELE KELSALL.

"From an insurance perspective it's about getting to know the individual business really well, which leads to an understanding of risk and how it is managed within the business.

"On the other side you have an insurance market which is equally diverse. Some insurers have appetites for certain types of business and not others."

It is crucial, said Rachele, for leisure and tourism clients to work with a broker who understands their specific needs.

"The better your broker understands your business, the better he or she can articulate that to an insurer. Businesses are unique and insurance programmes should be too."



Hugh J Boswell



CAMPLINGS

Linen • Laundry • Workwear • Dry Cleaning

Family-run laundry professionals Camplings services hotels and holiday parks in the eastern region.

It is a buoyant business, building a new factory at Great Yarmouth's Harfrey's Industrial Estate to improve further its offer to the region's accommodation providers.

"The biggest challenge for the sector is surely the National Living Wage," said Camplings' director RICHARD TURVILL.

"Tourism is heavily labour dependent itself, but so are its support services.

"So you have businesses facing increased operating costs as a result of the National Living Wage, plus their suppliers also have increased operating costs. They are being squeezed in what is effectively a double whammy."

There is a great deal of positivity in the sector in terms of volume of demand from tourists, said Richard.

"People want holidays in good numbers again and are keen to spend, we are coming back into better times.

"But the new expectation is for deals, discounts and packages, so there is certainly nervousness around how and where people are going to spend their money.

"It's a case of cautious optimism and stepping up to the challenge of delivering what people want at a reasonable cost."

Camplings' investment in Yarmouth was a reflection of his own optimism, said Richard, but across the sector there was an awareness that there were issues which needed to be watched carefully.

"For us business is healthy, but the sector is needing to deal with real inflation costs, the labour issue and an expectation of better and better quality."

Engage with your Destination Marketing Organisations (DMOs), expect to work hard, don't drop your guard

and be aware that the competition is increasingly sophisticated. That's the advice from ROB COLMAN, corporate partner and head of the leisure and tourism sector at leading commercial law firm Howes Percival.

Rob works in the buying and selling of businesses and companies and has insightful knowledge about tourism.

The key for a firm like Howes Percival is to maintain an in-depth knowledge of the legal issues that affect the leisure industry so they can service the needs of businesses such as hotels, pubs, restaurants, holiday businesses and attractions.

"The sector has been pushed hard and has grown in recent years," said Rob. "It is far more refined and sophisticated in terms of its branding, public relations and marketing. Businesses need to be aware of that and also understand that the consumer is harder to please today than 10 years ago because there has been so much improvement across the board.

"Consumers who are paying a premium expect the very best and with good reason."

Specific ongoing challenges include changing employment legislation and health and safety updates.

"But if you do it well, there are clear rewards. The top performers have slick PR machines and are highly adept at squeezing every penny from the consumer."

And what of the value of DMOs?

"Businesses need to engage with them. Working together is the way forward for leisure and tourism. The sector as a whole is in a really good place right now, just look at the breadth of options across the entire year."



HOWES
PERCIVAL



A wild time for good causes

The latest decorated-animal sculpture trail will kick off in Ipswich this summer when dozens of individually designed and beautifully created pigs hit the streets, bringing proven economic benefits alongside fun days out.

For 10 weeks this summer, from June 27 to September 2, Ipswich's streets, parks and open spaces will become home to the sculptures, which will showcase the wealth of artistic talent in the area.

Pigs have been chosen to celebrate Suffolk's rich agricultural heritage and its association with pig production.

And if it's anything like last year's events in Norwich, when the GoGoDragons hit the streets, it is sure to fuel a flurry of tourist activity.

The GoGoDragons raised £369,500 at auction.

But the added value of families, groups and individuals wandering through parts of the city they may otherwise never have visited, learning about businesses they had never heard of and buying services which they either needed along the way to fuel their hunting, or simply discovered as they walked, was surely even greater than the charity cash raised.

There are statistics to back this up - on average, visitor spend on food, drink, travel and other items increased by 60% during a visit to the 2013 Norwich version, GoGoGorillas.

Meanwhile, 56% of visitors to the same event had a more favourable attitude to businesses because of their involvement with the trail.

And of course at every one of these events there is always massive media coverage and social media activity involving hundreds of thousands of people of all ages.

For the Ipswich trail, businesses, community groups and educational establishments have been invited to sponsor a blank pig sculpture.

Artists, both well-known and undiscovered, will then be invited to submit designs which will be shortlisted and selected. Selected artists will be commissioned to customise one of the sculptures to create a unique piece of art.

Schools have also been invited to join in the fun and make designs for their own piglet, which will feature in a special schools trail.

The proceeds from the event will go to St Elizabeth Hospice to support local people and families facing a progressive illness.

The rise of the 'daycation' rather than the 'staycation' has been a notable part of changing behaviours seen by National Trust managers in recent years. The Trust operates a wide range of sites in the three counties – historic property, coastal land, sites of special scientific interest and ancient woodland among the diverse visitor choices. JEMMA FINCH, marketing consultant for the Trust, based at Westley Bottom near Bury St Edmunds, explains more.



Trusting in

Many of us have some sort of relationship with the National Trust.

We may not even realise this fact. There are plenty of miles covered by walkers on Trust land without necessarily knowing it. There are many vistas featuring Trust properties which we may never actually enter.

The iconic houses the Trust manages are well recognised by many – Blickling Hall, Ickworth House, Oxburgh Hall and Horsey Windpump among them.

The Trust is an independent conservation charity funded through memberships, donations, legacies and commercial operations, taking no direct funding from government.

The Trust's "pay for entry" properties in the six counties of Norfolk, Suffolk, Essex, Cambridgeshire, Bedfordshire and Hertfordshire welcome 1.5 million members every year and many more to the wide range of outdoor spaces.

"In recent years we've seen more people enjoy a 'daycation' whereby they opt for day trips throughout the year rather than long breaks," said Jemma.

"These often require minimal planning time and are lower cost, something which is

important to everyone when demands on time are becoming more sacred and the economy means that people are more cautious on how and where they spend their money.

"People also feel it's important to take that time to unwind and enjoy the simpler things in life.

"Time with the family becomes precious and the National Trust is a great backdrop to spend that time together. Weather also has a big role to play."

Those two factors – weather and general behaviour trends – are not within the control of the Trust.

What they can control, however, is the actual offer provided.

"We value our members, their support and loyalty. So making sure that there are reasons to return and continue their support is a big part of what drives us forward.

"We're opening earlier and for longer than ever before, constantly working on our service, ensuring we're meeting our different audience needs, refreshing our offer and experiences and communicating in a timely and relevant way.

"It's important we are giving people what they want, when they want it. If people feel that



the future

we're relevant to their day to day lives and are connected emotionally and practically to our places and what we stand for, that will go a long way in influencing visitors' decisions."

Strategically, the next five to 10 years will be about building presence in this part of the country and welcoming ever more visitors to Trust places, said Jemma, under the 'Put the East of England on the Map' vision.

COUNTRY'S HERITAGE: The National Trust takes care of Dunwich Heath (above), Sutton Hoo (right), and Ickworth House (below).

'In recent years we've seen more people enjoy a 'daycation' whereby they opt for day trips throughout the year rather than long breaks'

JEMMA FINCH, NATIONAL TRUST



THE LAST WORD . . .

The tourism survey which, as you know collects data in January and February, pulls together a review of the 2015 year, summarising its highs – and its lows – and touches on some key topics which had an impact for us all.

It also takes a snapshot of the confidence and commitment of tourism businesses for 2016 and beyond and touches on some of the complex aspects that will affect us. I welcome feedback and would love to engage in opinions and what you would like to see in future publications

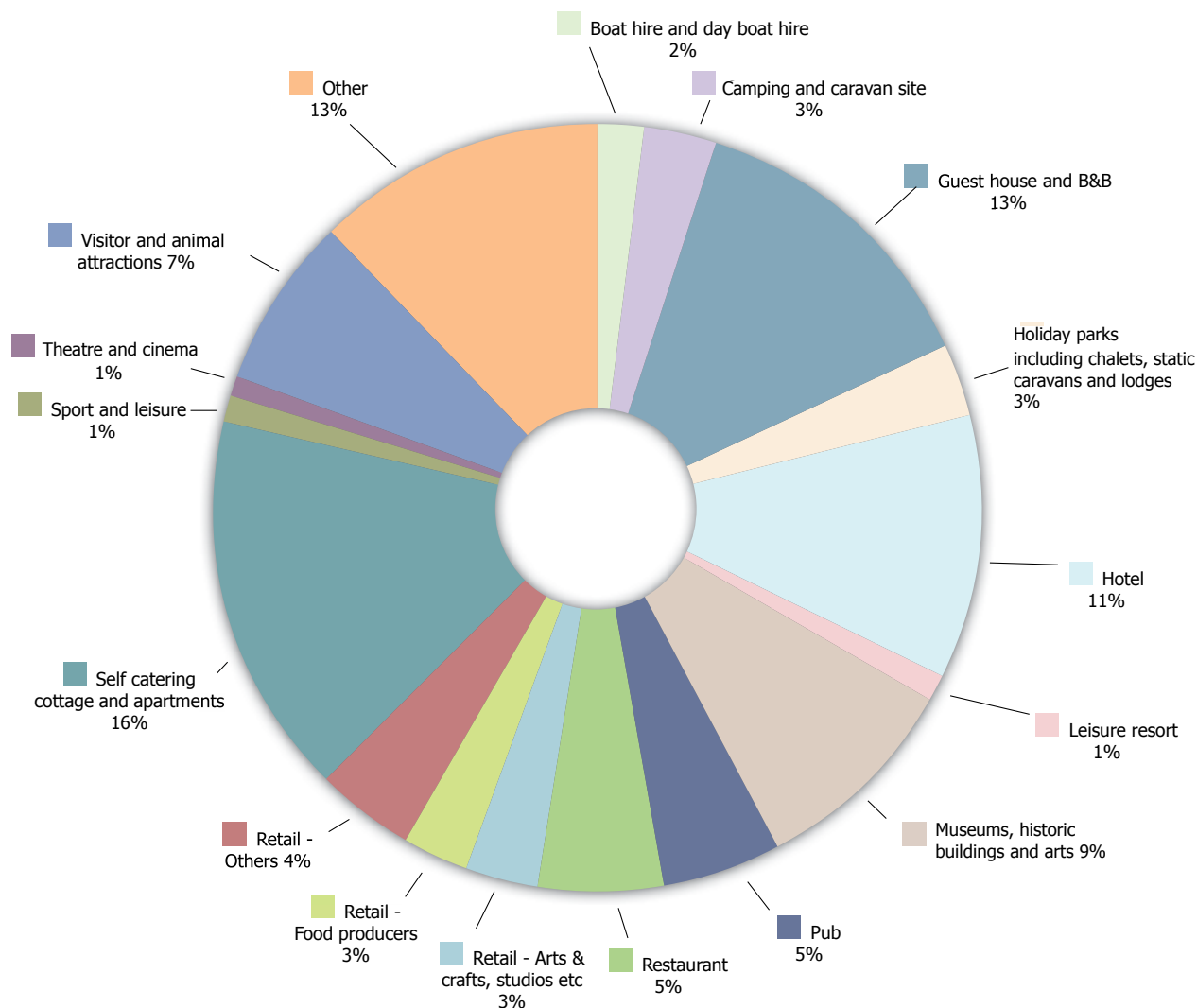
I would like to thank the businesses who volunteered to share the stories you have hopefully enjoyed reading, but particularly I'd like to thank the 350 businesses who invested time in providing the valuable data we have been able to share with you here.

I would like to thank those who support the survey, in particular Visit Norfolk, Visit Suffolk and Visit Essex and on a more local level all of the local Destination Marketing Organisations (pleasingly too many to list out here) for their support too, and of course I would like to thank you for reading the brochure.

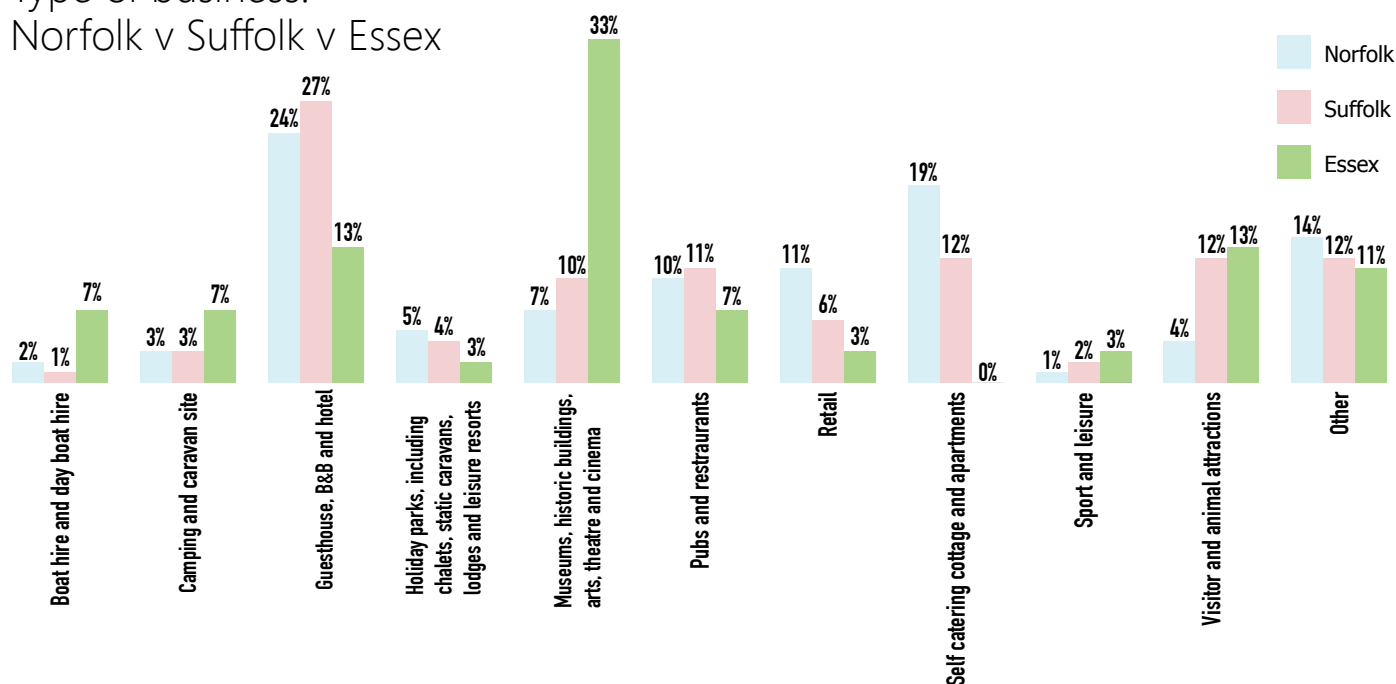
We have new commercial partners who have committed to ensure the future of the survey. I would therefore like to thank Adnams, Camplings linen services, Hugh J Boswell financial services, Howes Percival and Lloyds banking group.

For now I will bid you farewell and leave you with the numbers.

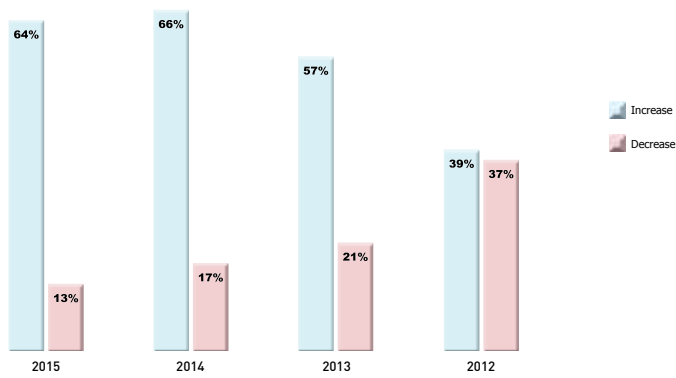
The Larking Gowen Tourism Business Survey undertakes an annual review of the tourism sector in Norfolk, Suffolk and Essex. It gauges the performance and activity of the sector during 2015 and provides an outlook for 2016, as reported by the businesses which participated. The graphics tell the story...



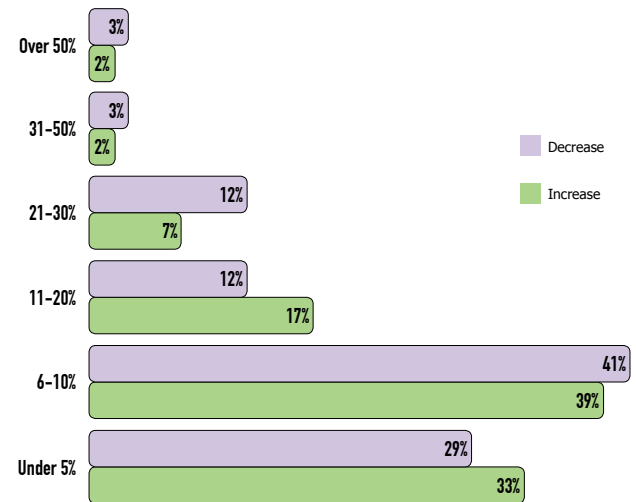
Type of business:
Norfolk v Suffolk v Essex



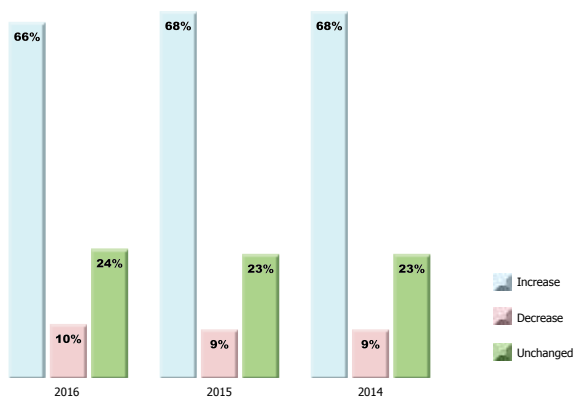
Turnover in 2015 and comparatives



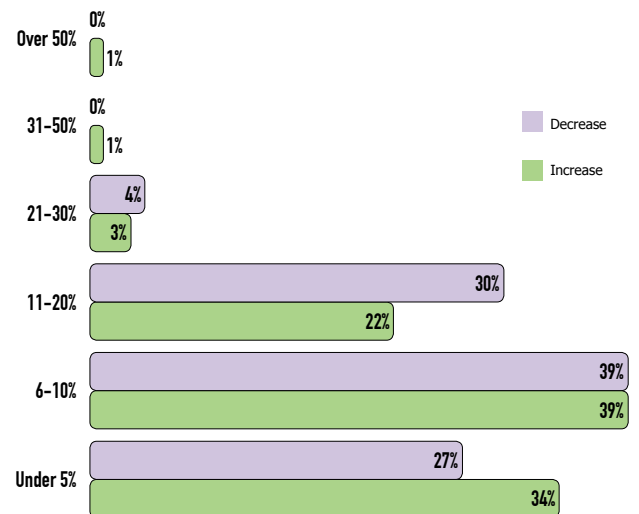
Turnover increase/decrease in 2015



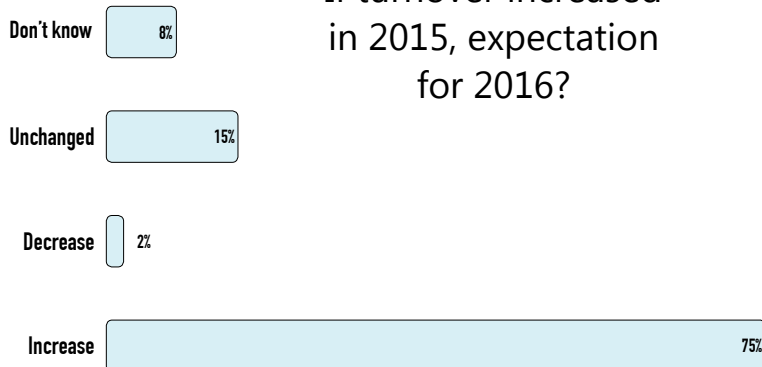
Forecast turnover in 2016 and comparative forecasts



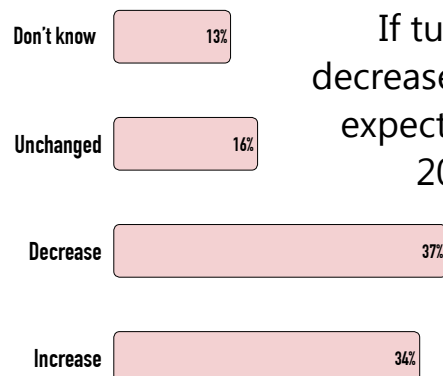
Forecast turnover increase/decrease in 2016



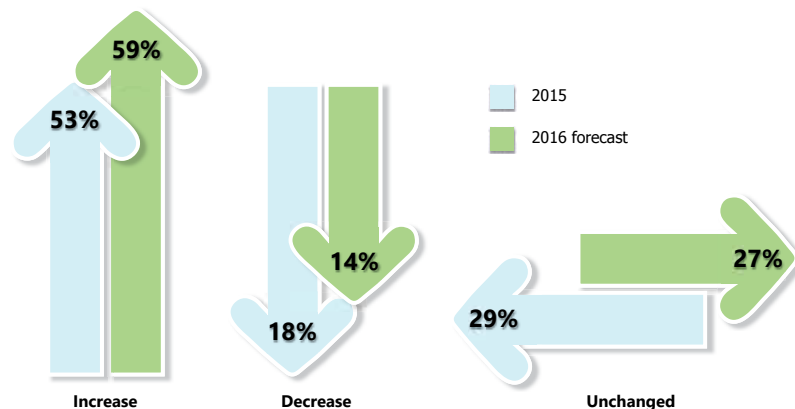
If turnover increased in 2015, expectation for 2016?



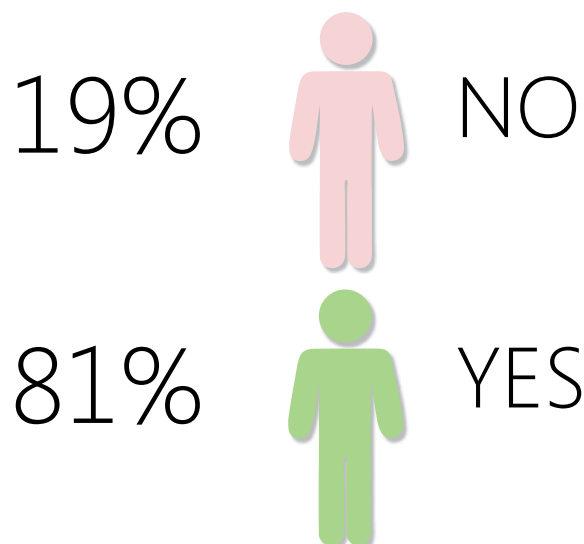
If turnover decreased in 2015, expectation for 2016?



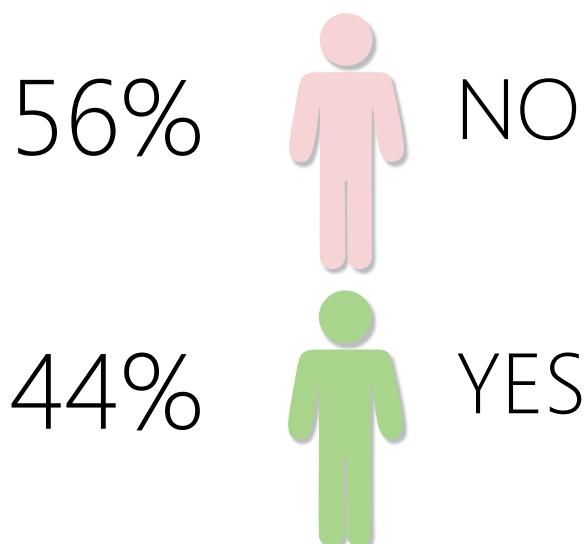
Profit levels in 2015 and expected in 2016



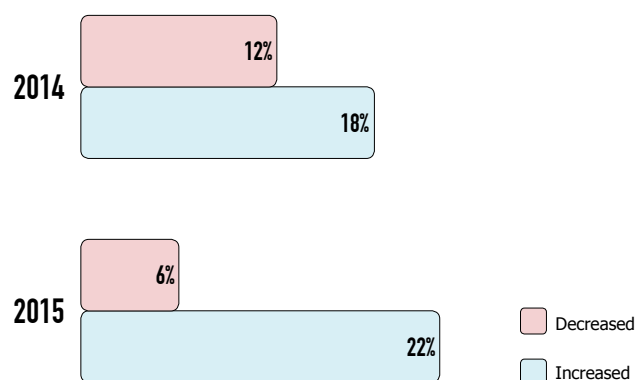
Do you employ staff?



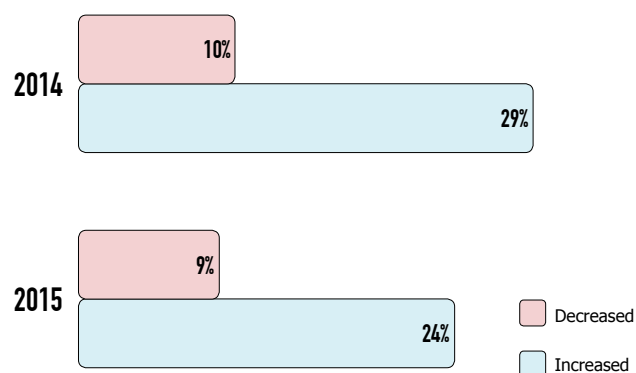
Do you employ staff on zero contracts?

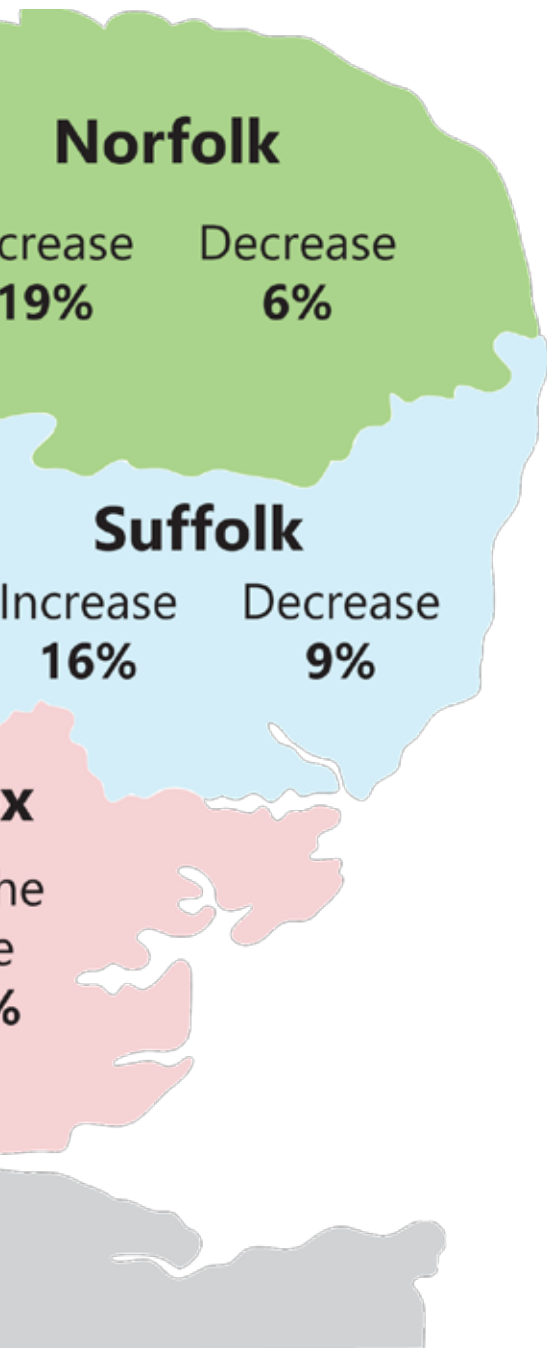


How did full-time staff numbers change in 2015?

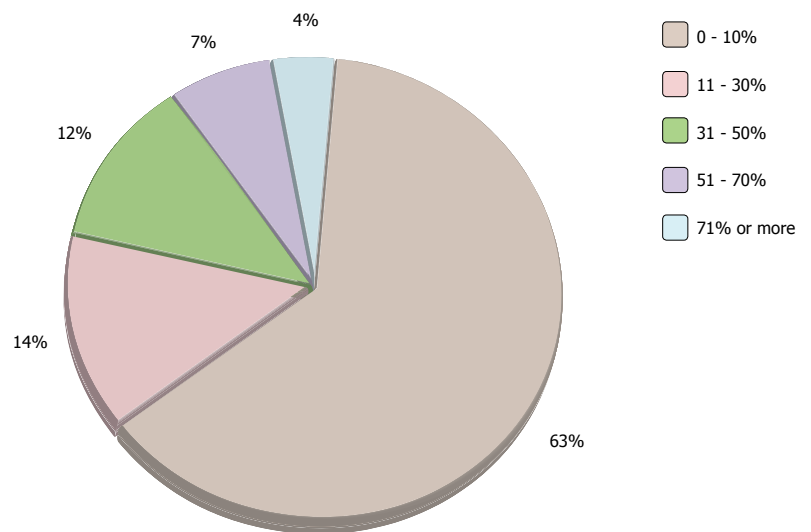


How did part-time staff numbers change in 2015?

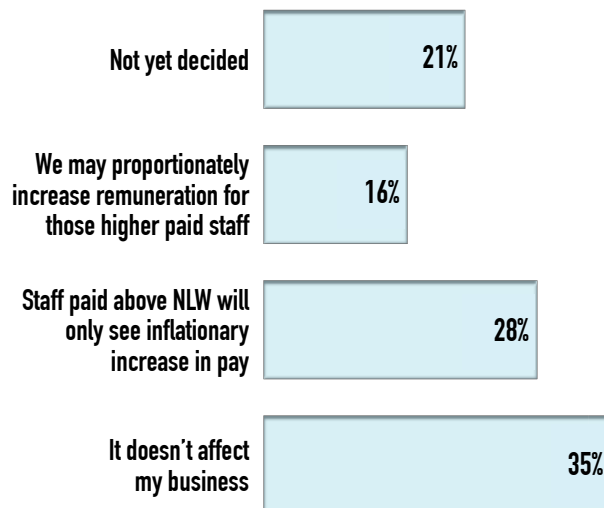




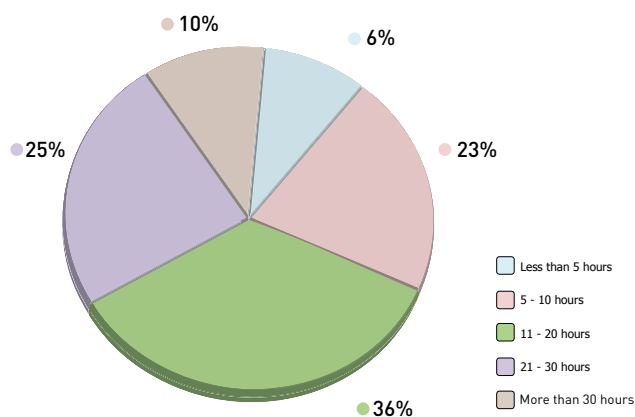
What percentage of your staff are aged 18-24?



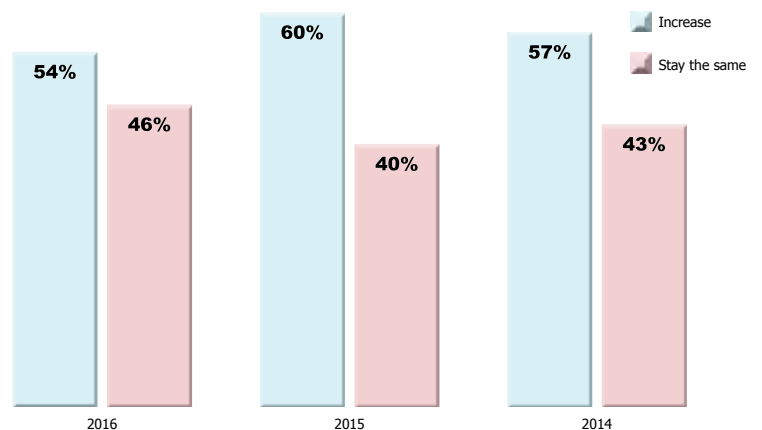
How will the National Living Wage (NLW) affect your wage costs?



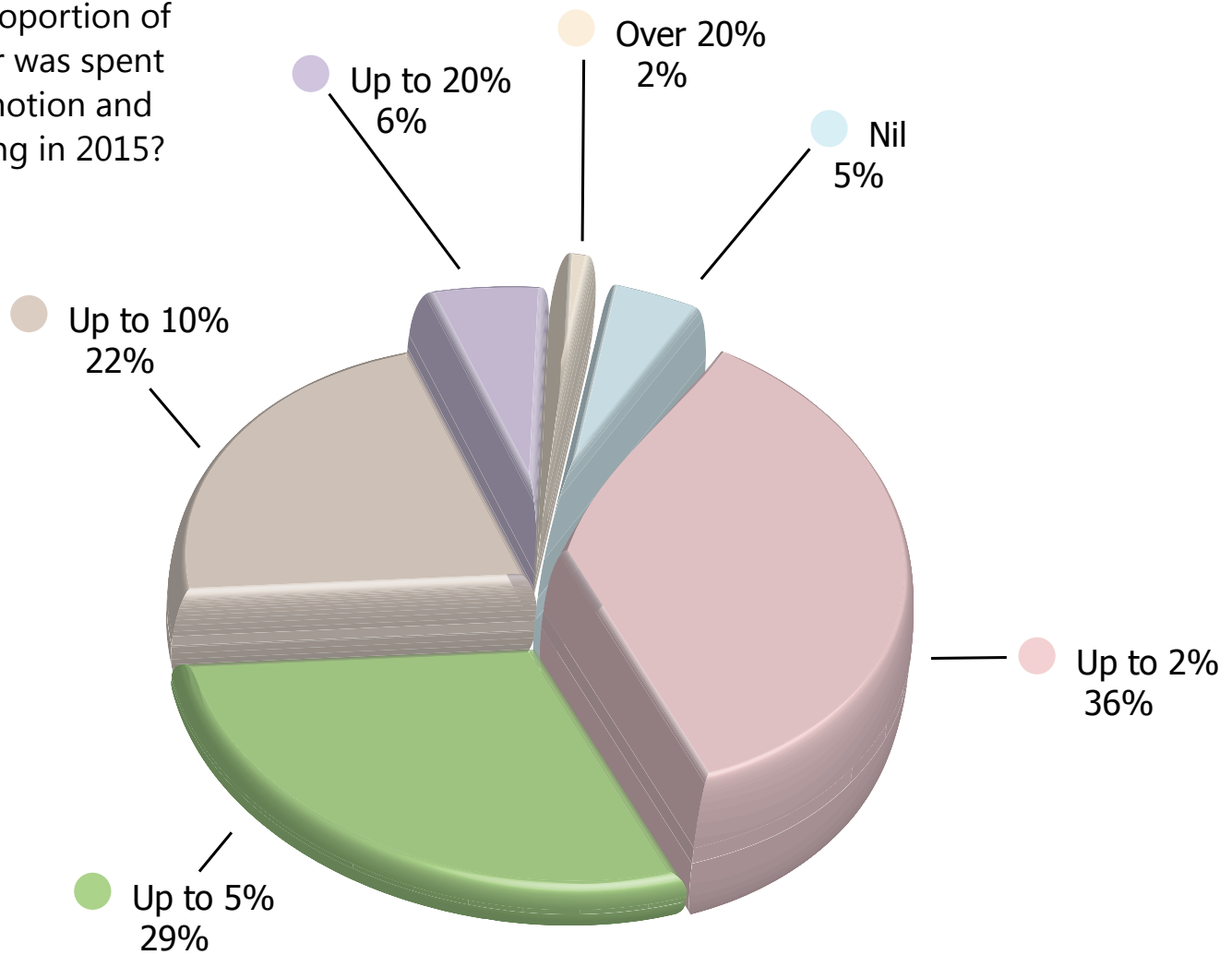
How many hours on average are staff on zero hour contracts given per week?



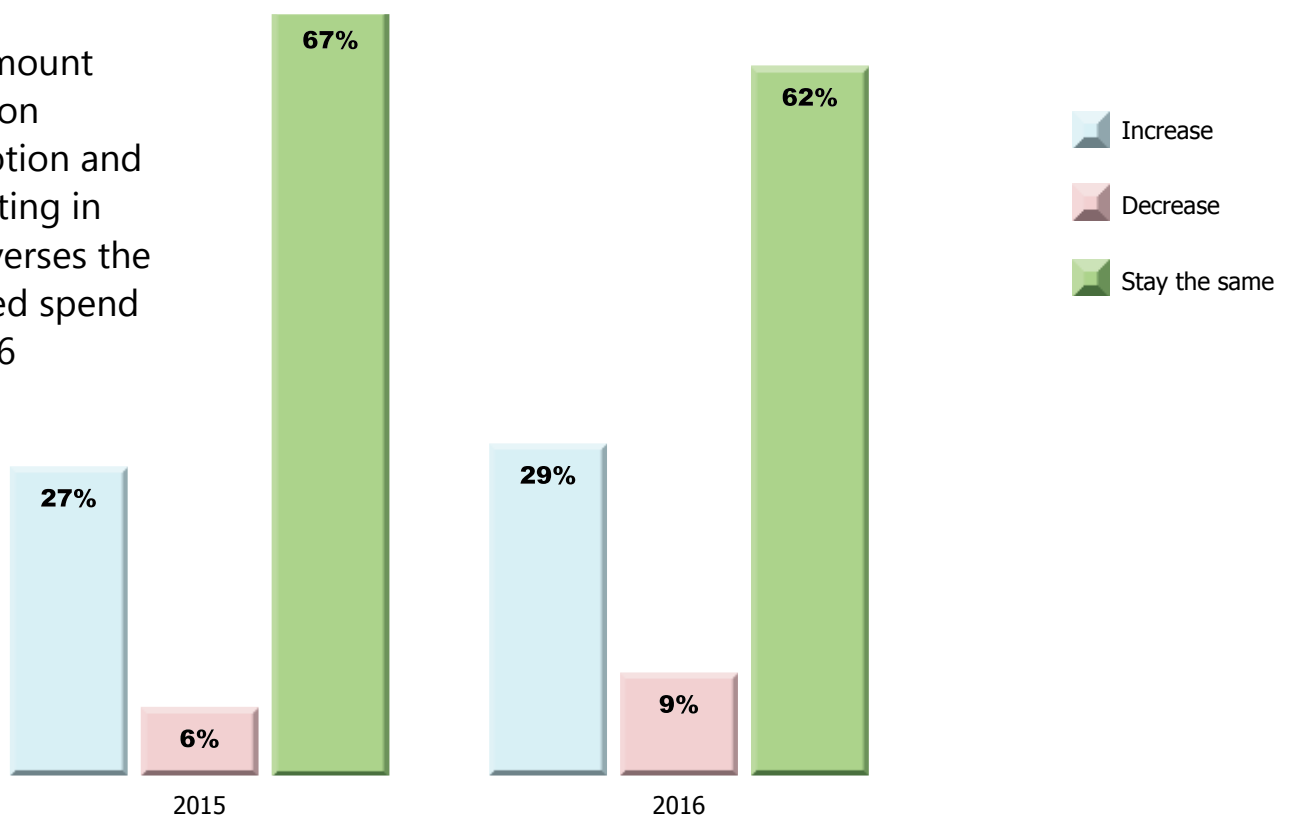
In 2016, other than staff impacted directly by the National Living Wage or National Minimum Wage, are your staff likely to see their pay . . .



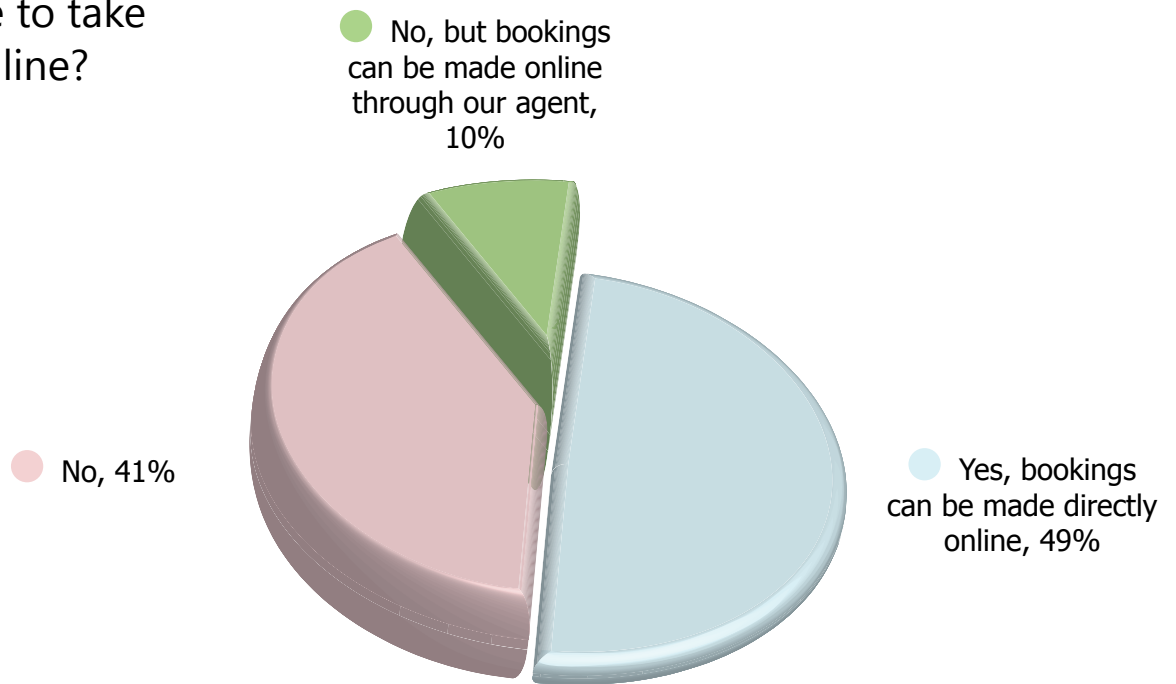
What proportion of turnover was spent on promotion and marketing in 2015?



The amount spent on promotion and marketing in 2015 verses the planned spend in 2016

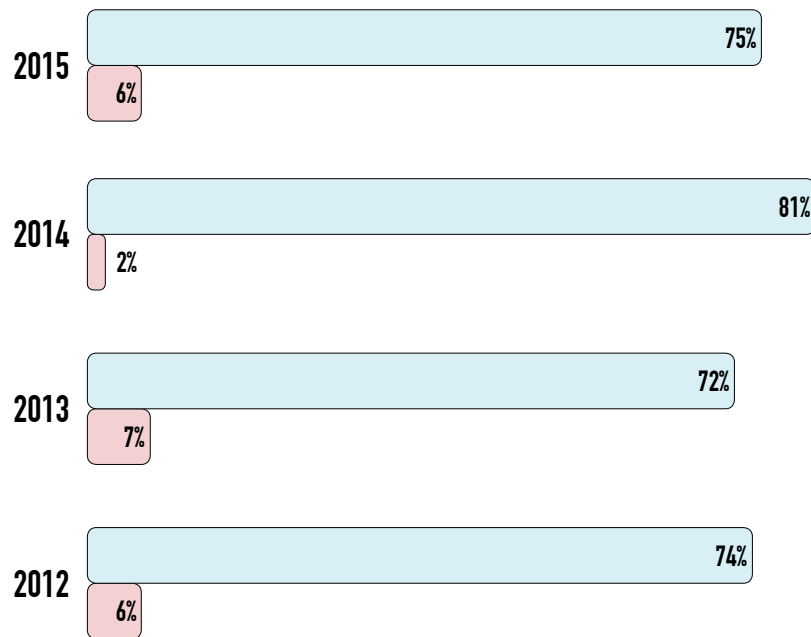


Are you able to take bookings online?



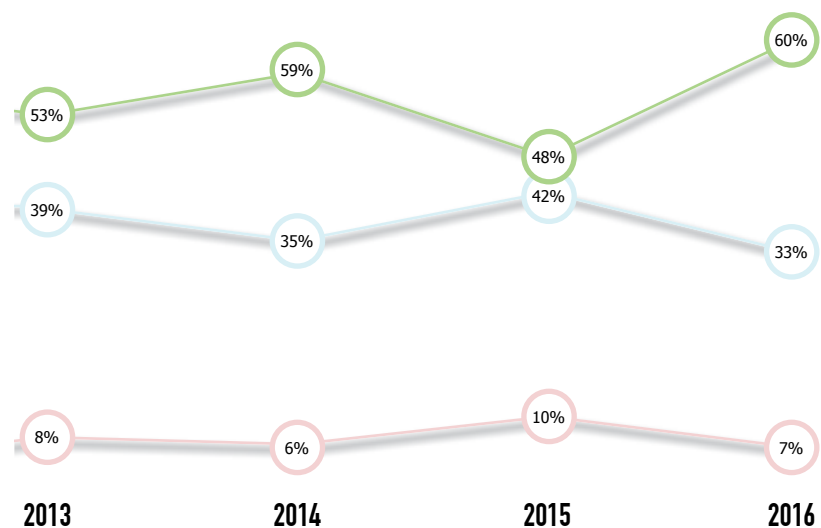
In, 2015 have web bookings?

Increased
Decreased

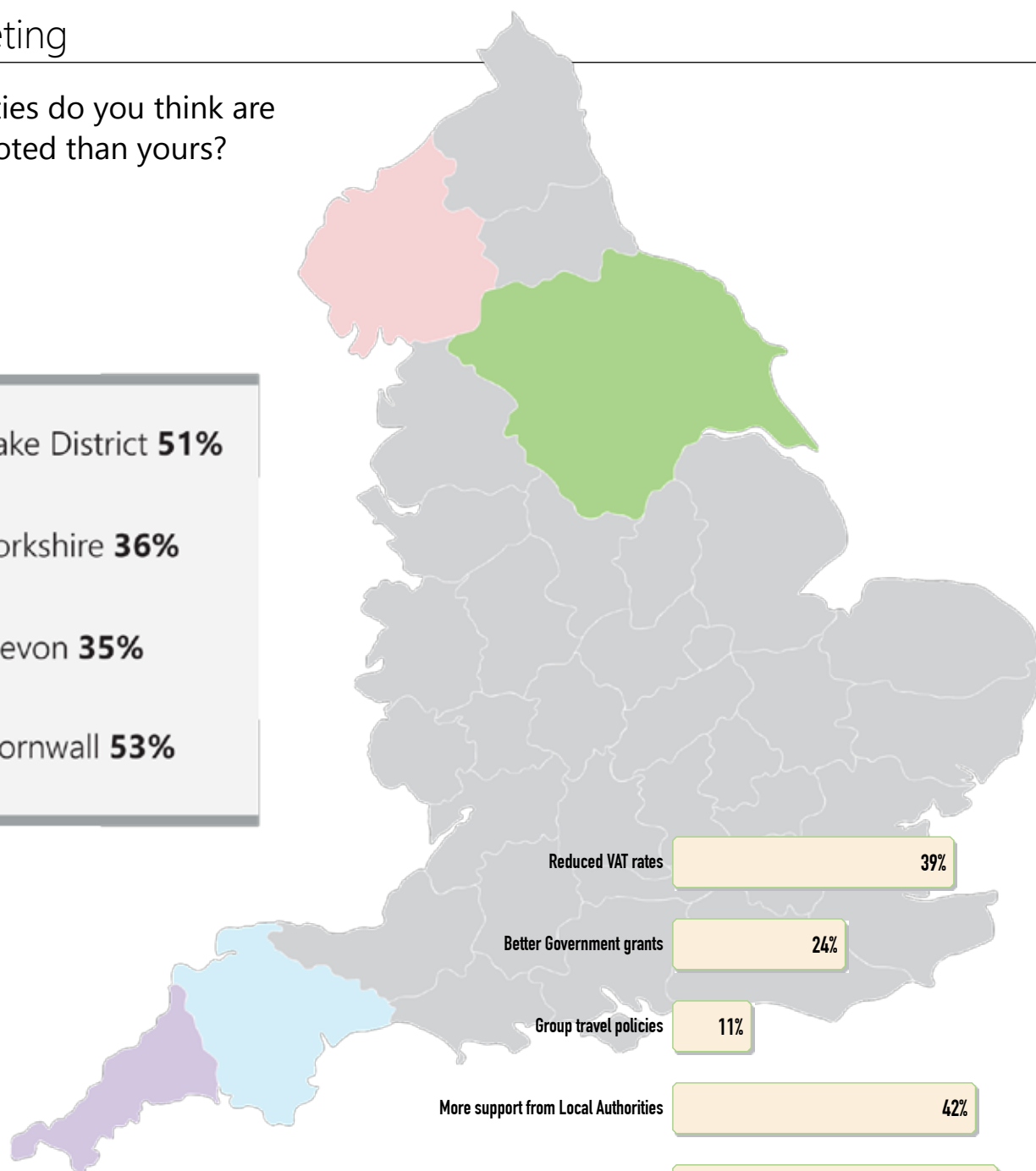
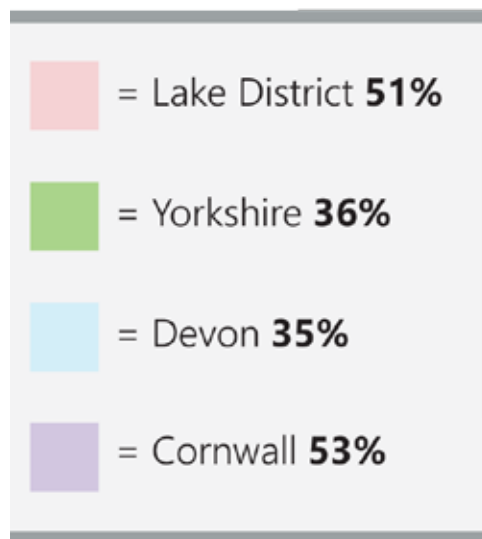


Destination Marketing Organisations are good news for the tourism sector?

Too early to tell
Yes
No



Which counties do you think are better promoted than yours?



Reduced VAT rates **39%**

Better Government grants **24%**

Group travel policies **11%**

More support from Local Authorities **42%**

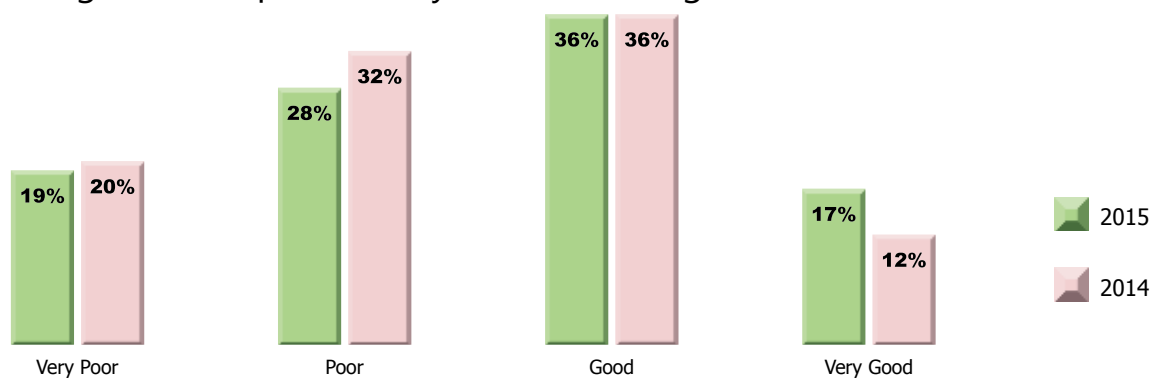
More advertising and PR **45%**

What more could be done to promote your region?

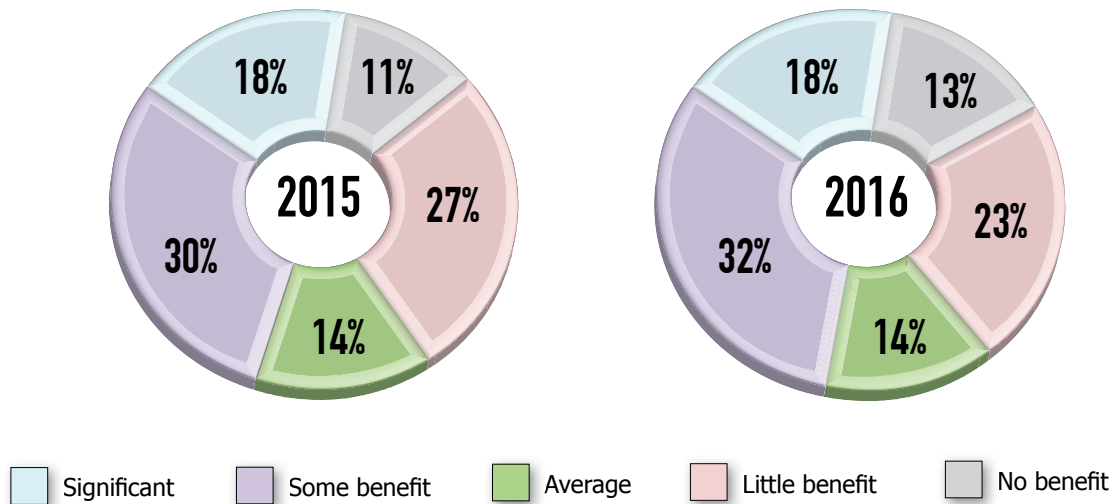
A lot, promotion is poor in our area **18%**

Nothing, promotion is very good **5%**

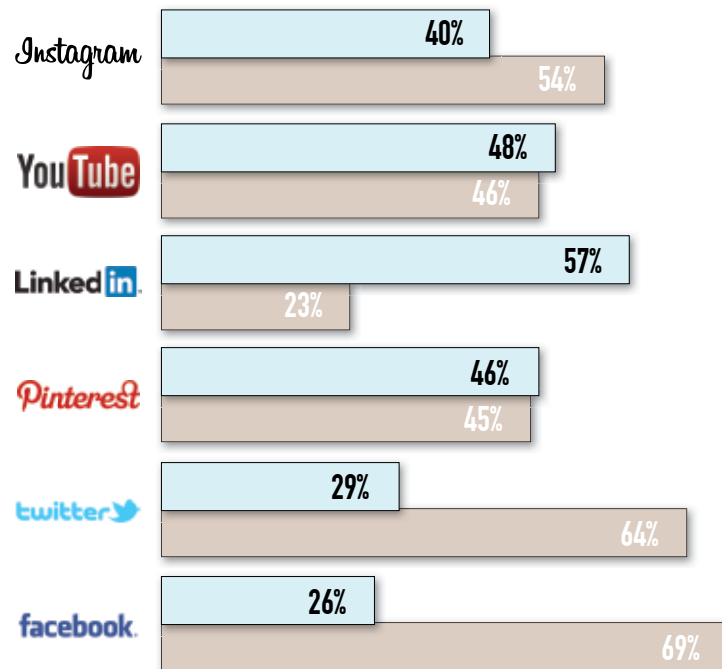
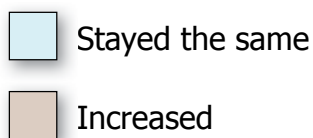
How well do you think your Destination Marketing Organisation promoted your area during 2014 and 2015?



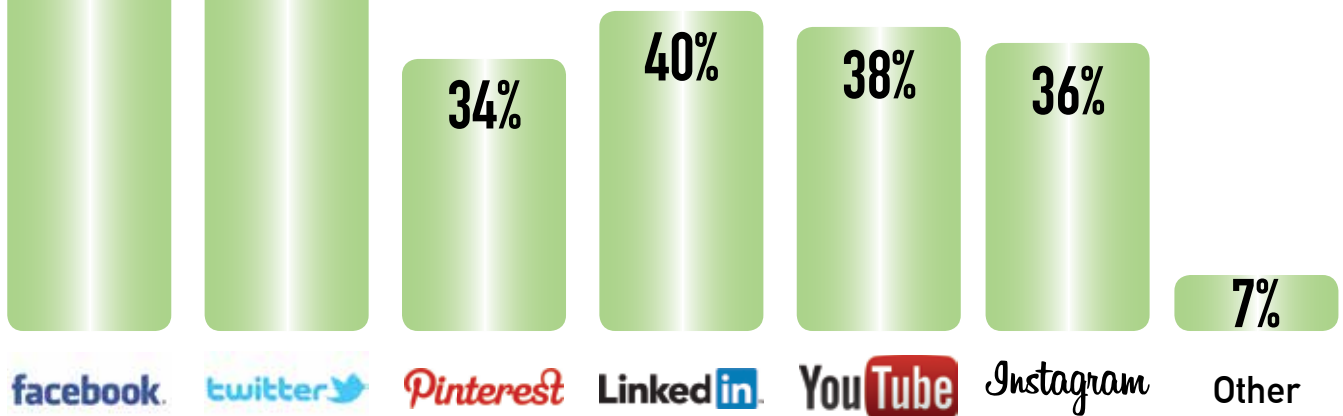
How beneficial is social media?



In the last 12 months has your use of social media . . .

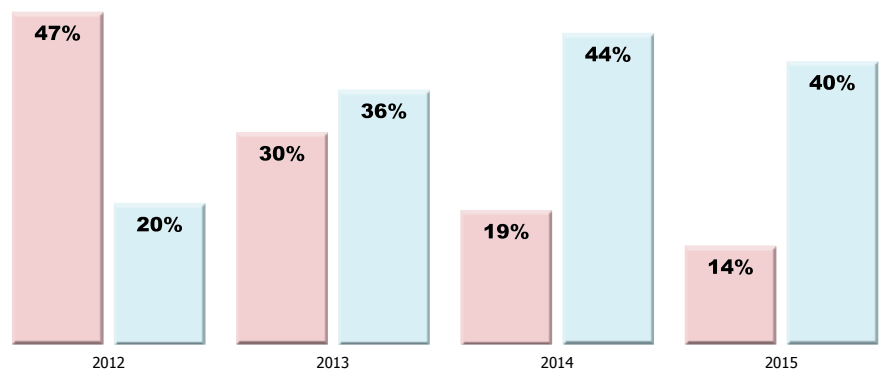


Which of the following social media do you use to promote your business?

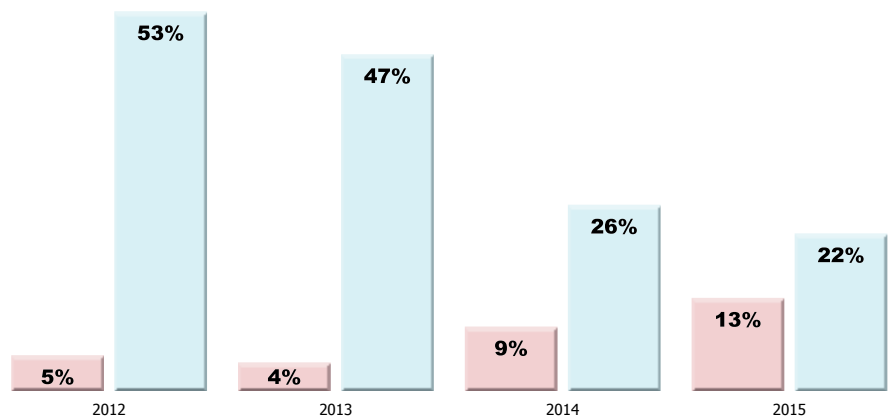


Customer behavioural comparisons...

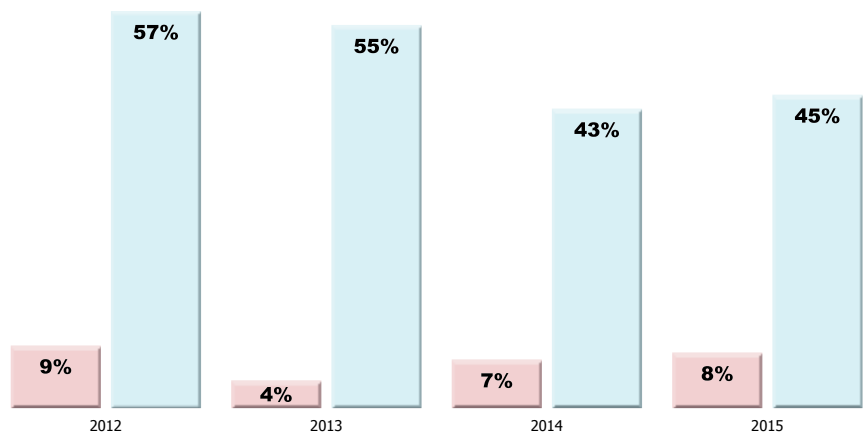
Secondary spend



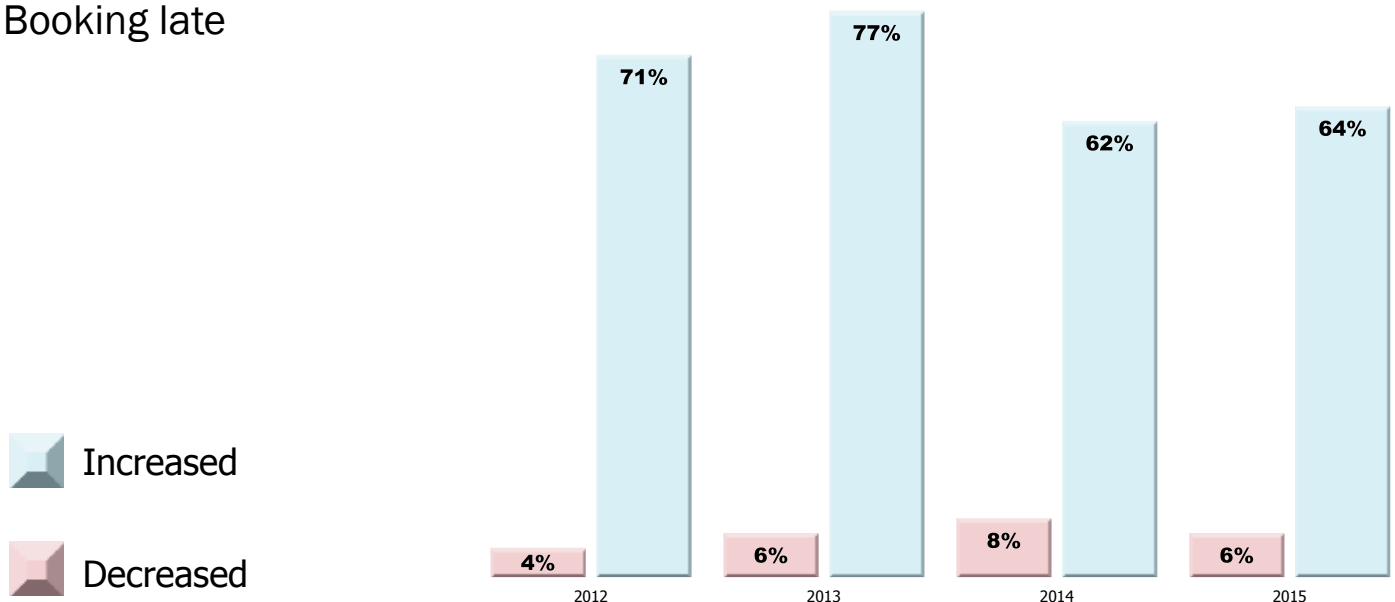
Sticking to a budget



On short stays

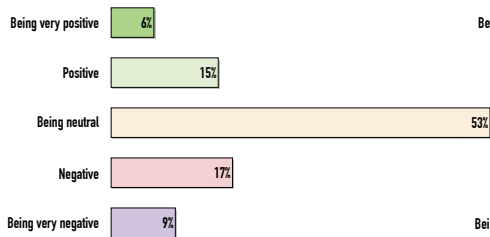


Booking late

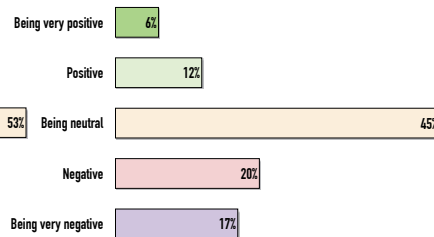


How did/will the following affect your business?

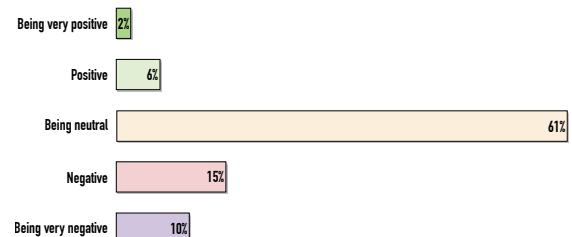
Eurozone economic uncertainty



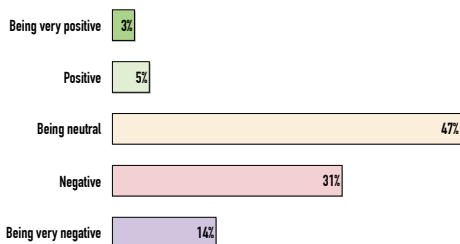
Local broadband speed



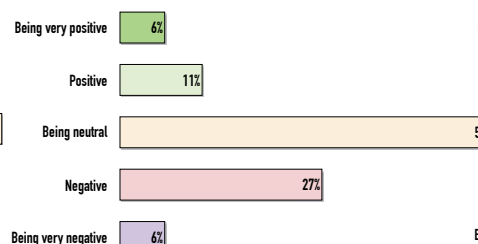
The minimum wage level



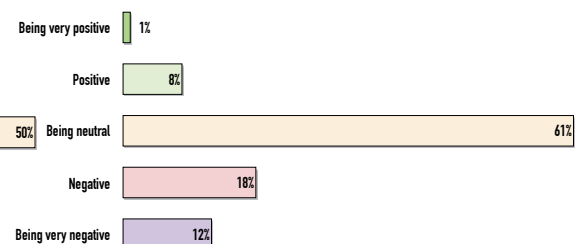
Cheaper European holidays



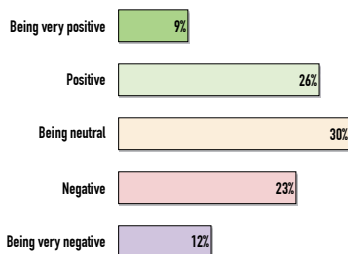
National campaigns by other tourism locations



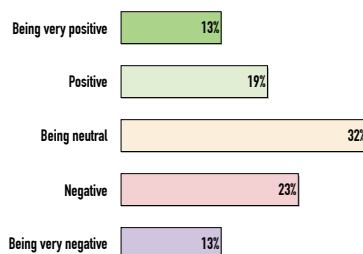
The level of the National Living Wage



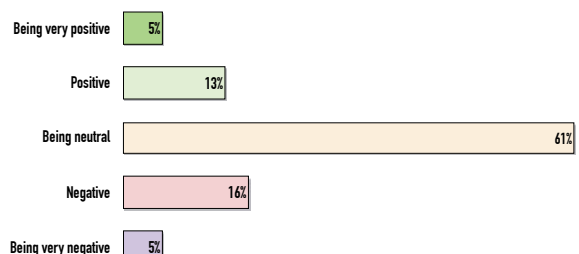
The national economy



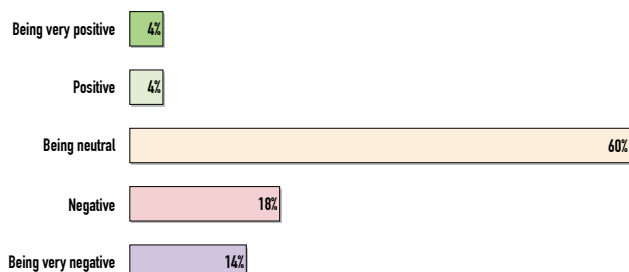
The weather in 2015



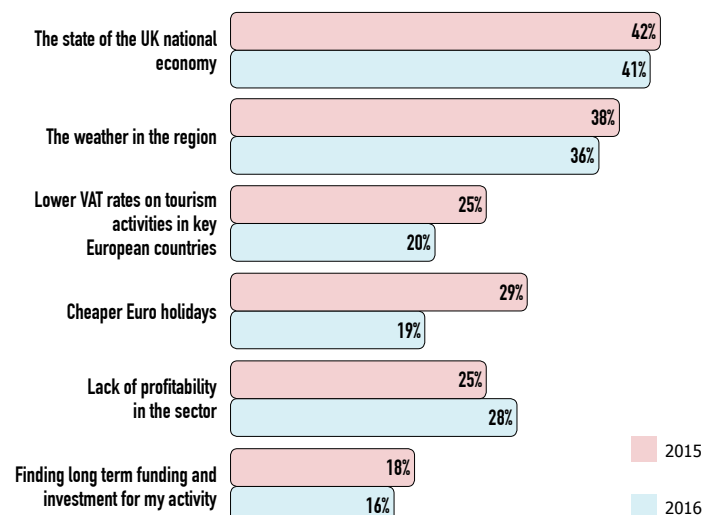
Popularity of other UK resorts



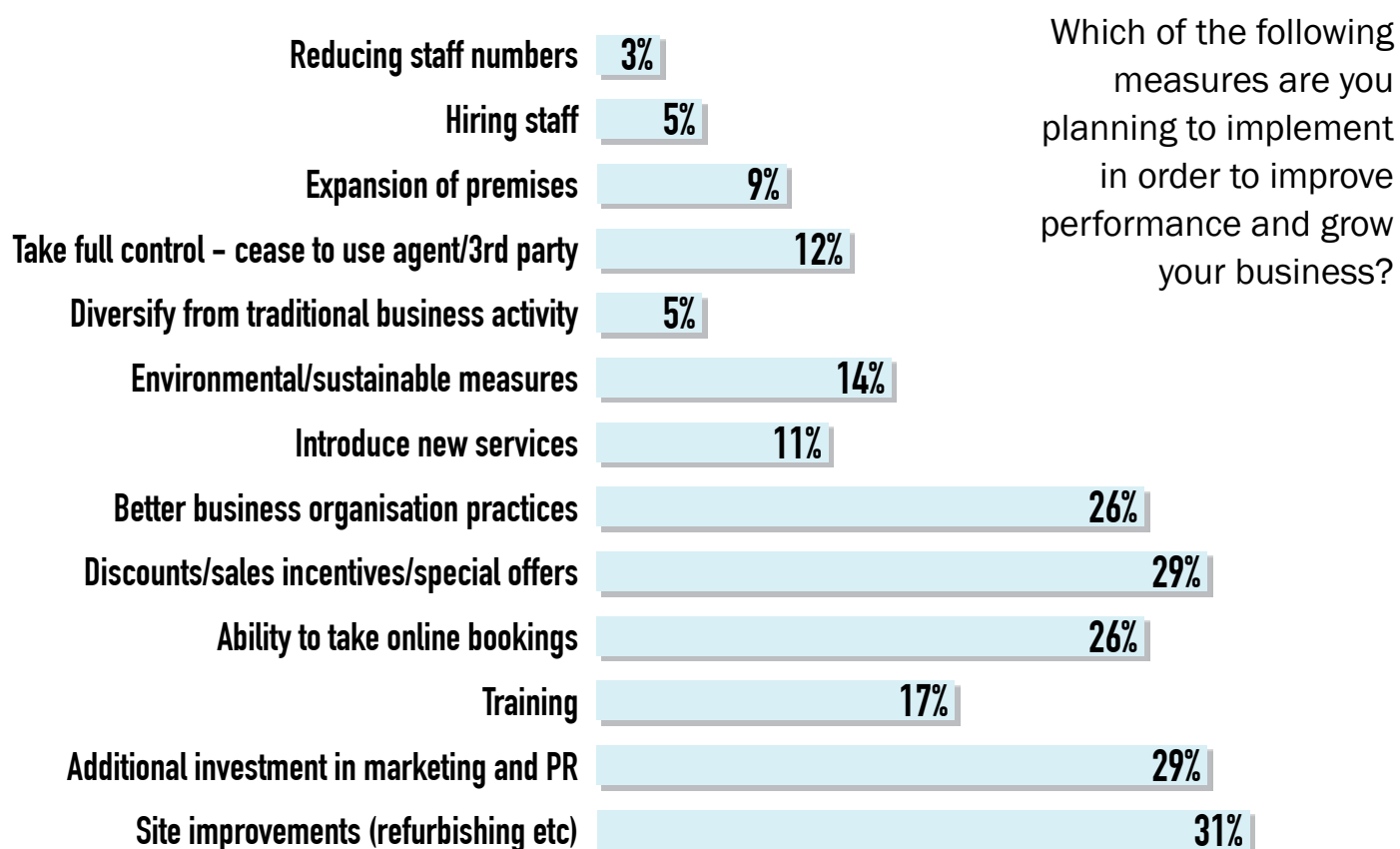
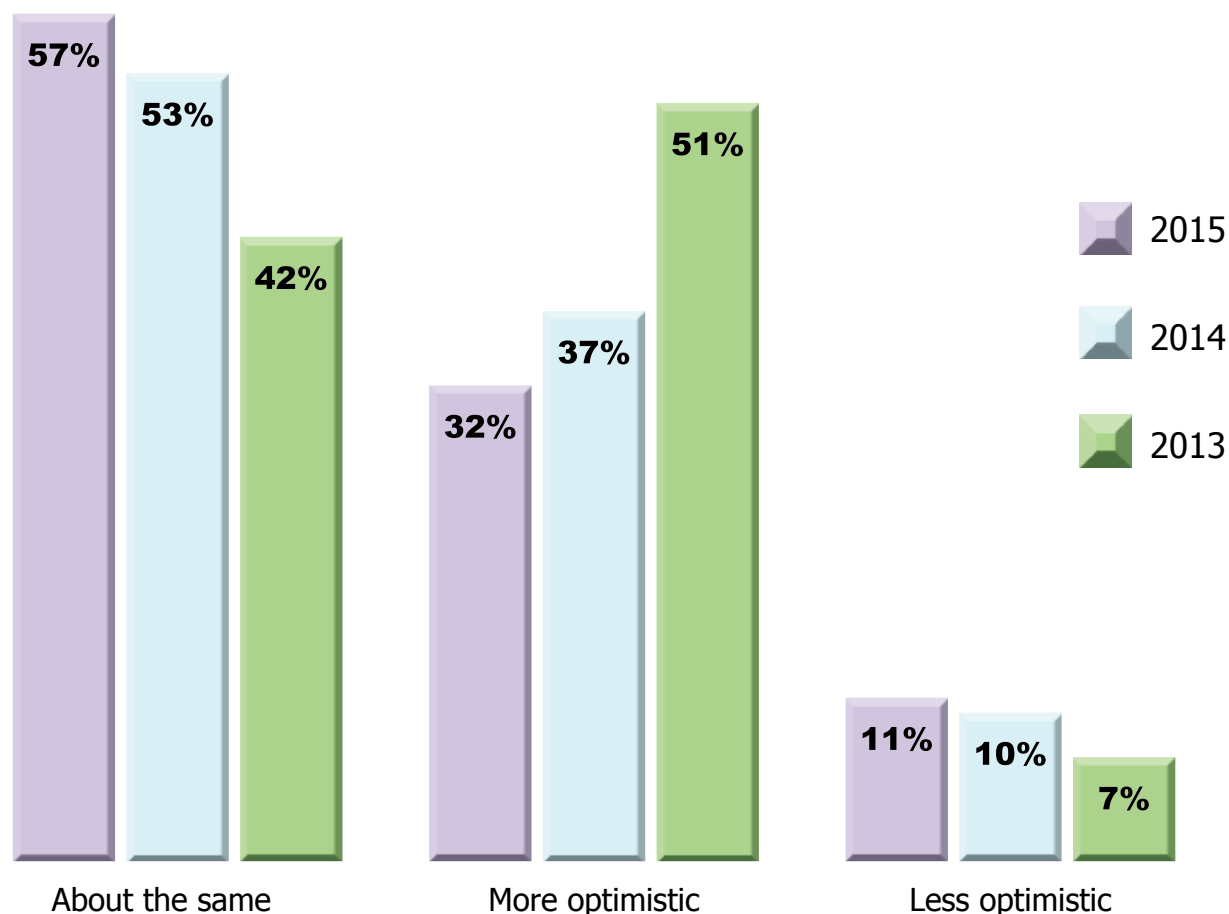
The effect of VAT at its current rate

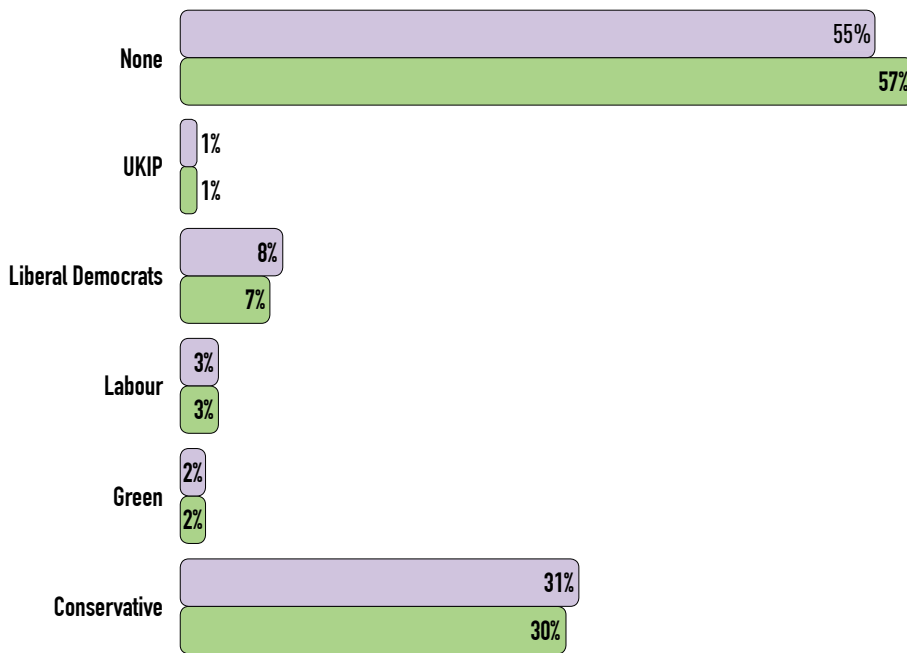


Which key aspects worry you most about the future?



Optimism about business prospects and the future



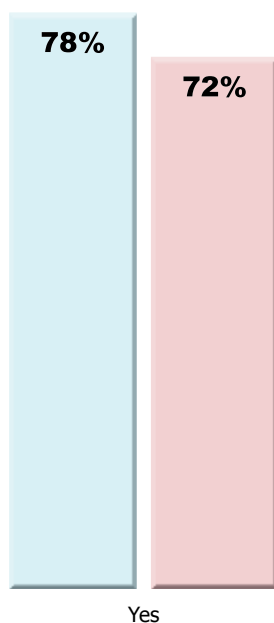
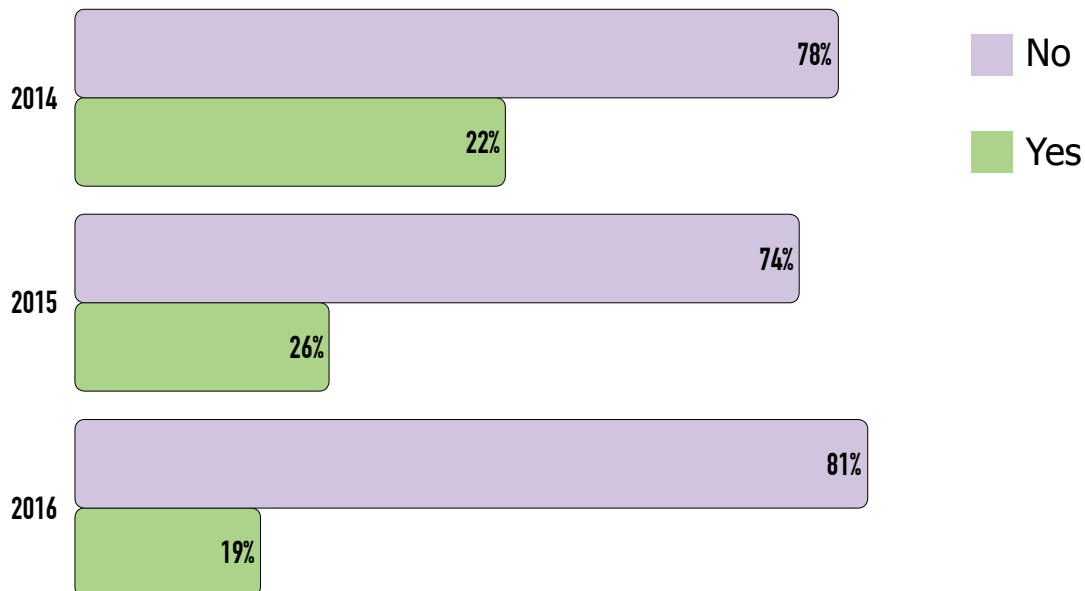


Which political party do you think is most supportive of your region's tourism and leisure industry, and has your view changed?

My view 2015

My view 2016

Do you feel that the Government provides enough support to the tourism sector?



The Cut Tourism VAT Campaign appears to be gathering strength. Do you believe VAT on tourism and leisure related activity should be reduced?

2016

2015

meet the team

Our specialist team helps businesses maximise their returns, advising on how to achieve maximum potential in an ever-changing environment, which is the driver to facilitate investment and succession.



CHRIS SCARGILL

Chris is the lead partner heading up the tourism, leisure, food and drink sectors, he is a regular TV and press commentator on matters relating to the sector and related tax issues.

Becky was promoted to partner in October 2010, and supports Chris in the development of the sector specialism with a focus on Suffolk and Essex.

 **@CScargillLG**

BECKY AMES



 **@BeckyAmesLG**

accounts & audit

Jo and Nick support the firm's larger tourism and hospitality audits and corporate clients. Nick also assists Chris by overseeing the tourism surveys.



JO FOX



NICK WARD

Emma, Martin and Sarah provide support and guidance for a wide range of businesses across the sector, covering sole traders, partnerships and limited companies.



MARTIN SANDERS



EMMA ARTHURTON



SARAH PIPES

personal tax

Michael, Melanie and Steve are personal tax specialists within the team and focus on furnished holiday lets and the smaller B&B owners, which is an area the government is targeting with more and more legislation.



STEVE GOODALL



MICHAEL MORTER



MELANIE HOWARD

technical experts



DANIEL MAY

With legislation continually expanding, Greg gets involved in the technical aspects of capital allowances while Daniel deals with the growing complexities of VAT.



GREG SMITH

talk to us . . .

Email any of the team on this page

firstname.surname@larking-gowen.co.uk

Find us on the web

www.larking-gowen.co.uk
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