



# TOURISM AND LEISURE BUSINESS SURVEY 2017

**Larking Gowen**  
Chartered  
Accountants



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## OPINION

Hands up if you have no time to spare?

Many of us find there are not enough hours in the day and the results of this survey show the majority of businesses are getting busier.

That's great for them as it shows that growth is being maintained.

Tourism doesn't just happen, however. Worldwide events and domestic political aspects may have changed the cost structure of going abroad, giving our country a bit of a windfall, but there is work going on behind the scenes too. Big campaigns as well as more subtle efforts are raising awareness.

I am often accused of using too many sporting analogies but here is another. Team sports are restricted to a limited number of players in the team, but the fan base can be unlimited.

Now let us turn that analogy to the DMOs. Are the team numbers limited? Do we support them regardless? Are we detached? Do we have a local team to support?

Our survey indicates that while 42% of businesses say DMOs are good for the sector, 51% still say it is too early to tell. At the same time the businesses call for better promotion of their local area. So I guess the challenge is to ask whether a few moments can be found to get more involved, to have your say and create an opportunity to influence, not just watch from the stands and say you do not understand or agree to the tactics being applied.

You are successful in your own businesses, so imagine the collective benefit of adding those skill sets to the local area.

Yes it means personal investment, and maybe cash too, but we all know how successful crowd funding is today. Lots of small contributions can make a big difference.

Ultimately we also have to be altruistic about the focus of promotional spend, but we know once visitors have found our wonderful region, they keep coming back.

I would therefore urge you to get involved.

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# 2016 How was it for you?

In a year in which the world was certainly shaken if not stirred as a result of both Brexit and the Trump factor, there seems to have been a boost to our tourism and leisure sector.

The value of tourism in the UK continues to grow and it certainly seems that for the majority we are seeing our fair share – possibly more – across Essex, Norfolk and Suffolk.

Looking forward, it is yet to be proven whether the doom-mongers are wrong, or that we are currently in a honeymoon period with reality just around the corner.

The reaction in the currency markets has certainly brought a focus on the positives of holidaying in the UK.

So how was 2016 for you? With the weather being a constant worry for many businesses, it was truly a great year, with East Anglia enjoying more hours of sunshine than any other region in the UK and we recorded the eighth highest average temperature since records began. June was wet, but the visitors still came and September excelled. That helped extend the season, with the temperature 2.7C above the average for the month.

So will we see an end to the weather being a fear factor? With 33% still seeing it as a key worry for the success of their business it's doubtful. But we are one of the driest regions in the UK and maybe the message will finally become loud and clear that we should be the destination of choice.

Looking at turnover, 68% of businesses saw an increase in 2016 and an optimistic 66% anticipate increases in 2017.

Of the 68% who saw an increase in 2016, nearly three quarters anticipate an increase in 2017. Of the 13% who saw a decrease in turnover, 1 in 4 anticipate seeing a further decrease in 2017.

Just over a third of those surveyed saw a change in fortune.

It is often said that turnover is vanity – so to see those turnover improvements convert to increased profits for 56% of businesses (57% forecasting improved profits in 2017) is rather pleasing.

Last year saw the introduction of the National Living Wage (NLW), while 2017 sees it increase to £7.50 per hour (actually slightly lower than expected). The impact of this has been significant, with 40% of businesses saying it had a negative impact on their business.

No-one wants to undervalue the contribution of their staff, but they do see the rise as taking place too quickly.

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.

Some 39% of businesses stated that the National Minimum Wage (NMW) impacted them negatively, too.

So, how do we reconcile the impacts of the NLW to profit changes?

One in eight say they accept profits will fall, and reduction in spend is being made elsewhere; 11% are looking at cutting staff numbers and 8% potentially adding in more zero-hour contracts.

Looking at staffing, for those receiving more than the NLW or NMW, some 14% say their staff will see a pay freeze and a similar level see rises below inflation, with 30% increasing only in line with inflation.

Price increases are the answer to combatting the extra cost for 22%, but how sustainable that will be longer-term is a worry for some – 43% worry about the future of the UK economy, 28% about long-term profitability and 15% on finding long-term funding.

The opportunity to offer breaks to those with disabilities seems to be an ever-

growing opportunity, though 37% say legislation, planning and cost is a barrier. Maybe local government could look to help?

I will leave you now to review the detail of the data and hope the articles bring to life some of the statistics, providing useful background to how businesses are operating.

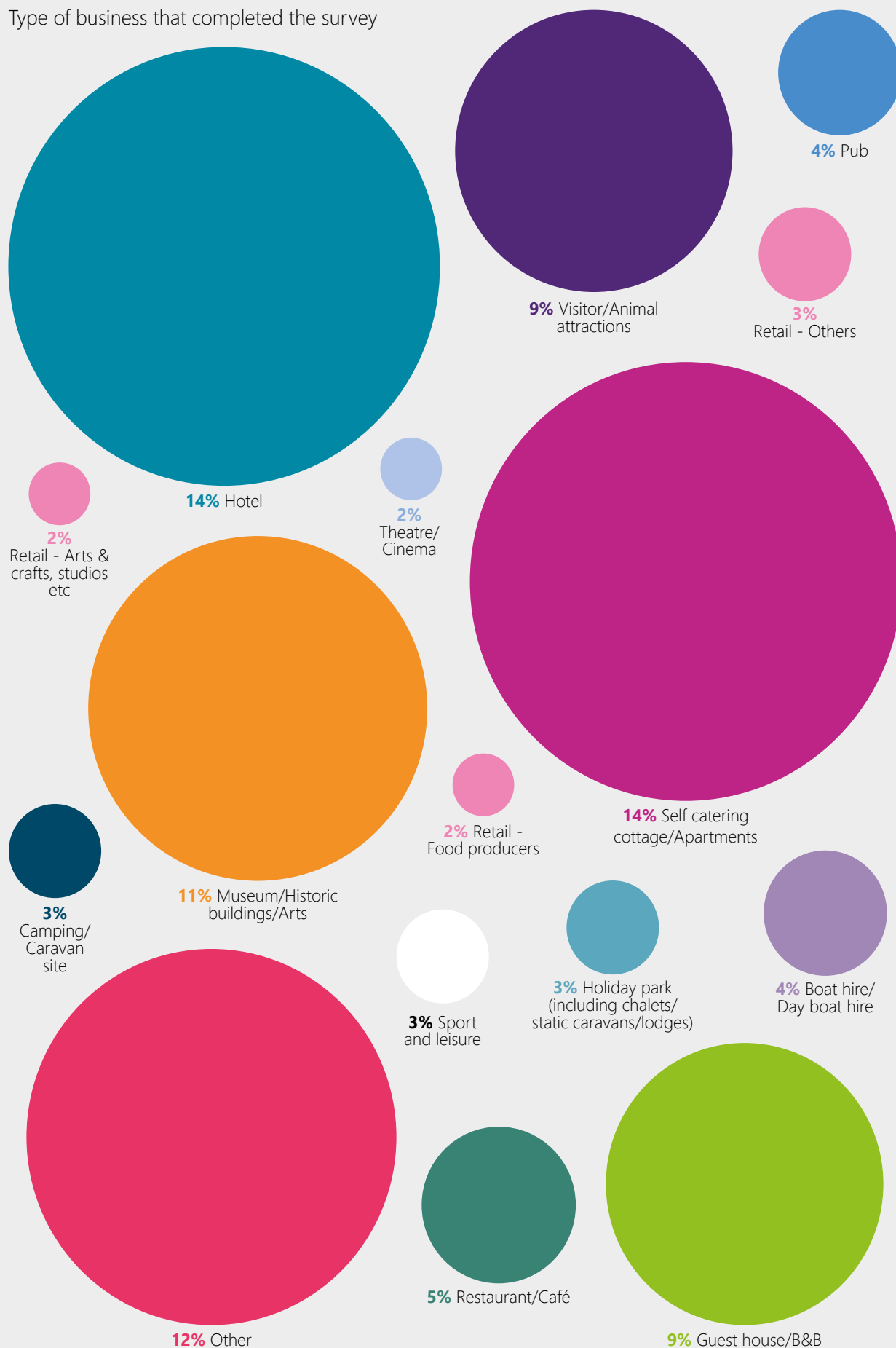
One thing for certain is that the tourism and leisure world never stands still. It is inundated with changes and challenges – not just local issues but worldwide politics affect our customers and their behaviour patterns.

Businesses therefore need to be ready and flexible with their minds open to the opportunities that may present themselves.

 @CScargillLG



Type of business that completed the survey





# Direct approach to boosting tourism

Working together is crucial and a collaborative effort has seen positive results in recent months. What have the county brands around the region been doing this year to promote your businesses, and how do they perceive the market direction for the coming year? Operating individually will work to an extent, but collaborative working can boost results – that's the message from county brand bosses.

"The national landscape has altered, with Visit Britain using regional county brands to run international promotions".

"The Friendly Invasion, a campaign to attract more American tourists to the region by highlighting our links to the US military's enormously important role in the Second World War (see pages 8-10) is the first time that so many of the region's Visits have worked collaboratively on one project – and the results have been excellent," said Pete Waters, executive director of Visit East Anglia and Visit Norfolk.

"That effort led to a marvellous result earlier in the year when we were able to bring over to the UK several key people linked with the Spielberg/Hanks film series trilogy which started with Band of Brothers and The Pacific and will be completed with Masters of the Air, which is about the eighth air force who were largely based in East Anglia.

Tourism in Normandy saw a 40% uplift in US visitors after the first two films.

"So if we can emulate those sorts of figures, it will make a huge difference to many businesses over a long period of

time".

"We now have time to ensure that the needs of those prospective visitors can be met when they come."

Collaborative working is also a target on a more local level for Visit Suffolk, explained partnership manager Helen Cutting.

"We are working with the local Destination Marketing Organisations (DMOs), helping them develop, creating new ones and assisting with their business engagement and networking," she said.

"The Suffolk Coast, Discover Newmarket and Visit Ipswich already operate and Visit Bury St Edmunds is about to be launched. There are also tourism action groups, which won't have quite the same funding, but will be a group of tourism businesses working together to promote their activities.

"The benefits of DMOs are clear – collaborative marketing, pooling resources, links through to Visit Suffolk and Visit East Anglia, discounts on advertising rates and networking opportunities."

This can be seen in Essex as explained by Visit Essex's strategic tourism manager Lisa Bone.

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"We have accessed external funding in the region of £1m, including EU funding and Discover England Funding. As well as being involved in the Friendly Invasion launch we are part of the Gardens and Gourmet project, a new national tourism campaign for 2017 which celebrates Britain's best gardens, restaurants and local producers".

"We have organised familiarisation and press trips, worked on the Passport to the Coast project, which allows holidaymakers to create their own itineraries by watching interactive videos and increased our digital activity.

"We have continued to build our collaboration and we have good working relationships with the borough and district councils, and the various Visits – Kent, East Anglia, Hertfordshire, Cambridge and beyond."

The wider picture around the East Anglian region is a positive one, added Pete.

"It has been a good year for tourism, the visitor economy across the region is still growing very well. It is the largest industry sector in East Anglia worth £10bn a year, and one of the biggest employers. That £10bn figure compares well to Yorkshire's £7bn"

"And Norfolk's figure of £3.1bn does very well up against Cornwall's £2.4bn – especially considering Cornwall gets so much national television publicity from popular TV series' Poldark and Doc Martin".

"We are doing very well from an economic point of view, but there is always more we can do. There is certainly a theory that we are almost too close to London, so to some people it doesn't feel like a trip away.

**Activity in Essex has also been significant this year, said Visit Essex's strategic tourism manager Lisa Bone.**



"But of course the contrast between London and the vast expanse of coast and countryside we have is huge – and that is what we have to continue to sell to people.

"Add to that the fact that our

accommodation is very good value for money, a third less than Cornwall prices. And we have the best overall climate in the country, we are the sunniest and driest. In the past we have hidden our light under a bushel somewhat and not approached government enough, or been vocal enough. Other regions have had more central government investment and that is what we are trying to reverse," said Pete.

One of those reversals is a successful application to the £40m Discover England Fund for £237,000 to create the Friendly Invasion bookable product – three, five and seven day itineraries designed for the US visitor and taking advantage of a huge range of relevant tourism experiences. Expect to see many more of our friends from across the pond both in the near future and over the coming years.



County Brands are all about building partnerships to boost tourist destinations such as Southend (previous page) and Colchester Castle (top) as well as promoting home-grown brands like Tiptree preserves.

# KEY MESSAGES

## BREXIT

In the short term Brexit is "very good news" for the regional tourism economy, said Pete Waters (right), executive director of Visit East Anglia and Visit Norfolk. This is mainly because a weak pound leads to a double win – more people having domestic vacations in the UK and overseas visitors being able to have more affordable trips.

"However, Brexit has not happened yet and so we don't know the long term impact," added Pete.

"There are two key messages. One is we have to keep marketing and promoting ourselves in Europe to reassure the continent there will always be a warm welcome from people here in East Anglia.

"The second is a message to government. While they are talking about continuing to have high net worth migrants, the tourism economy, much like the agricultural sector, relies on seasonal workers from Europe. It is vitally important that we



maintain some sort of visa facility, even if it's fixed term, to allow economic migrants to work in tourism."

## DIGITAL MEDIA

The trend for video is clear – especially in the world of social media.

The Visits have been taking advantage of this growing habit.

"We have had two million views worldwide on our Visit Norfolk online videos," said Pete.

"By the end of this year, 75% of all online content will be video according to research, so it's a sensible activity to be involved in to communicate your message.

"We have dropped

the length of videos to reflect additional research which says 30 seconds is better than two and a half minutes."

Helen Cutting (right), at Visit Suffolk, said the 'You. Unplugged' series of videos they started creating last spring was attracting 150,000 average views per film, with approximately a million views in all.

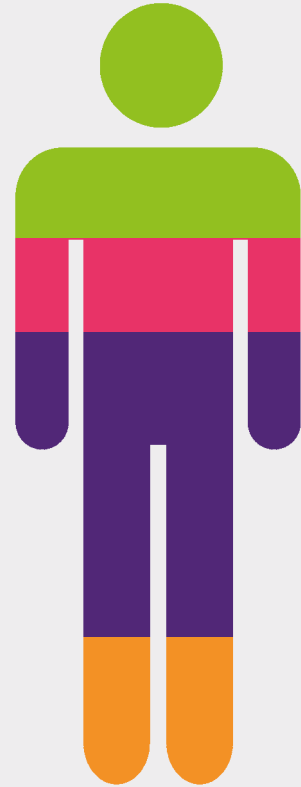
"They are tasters of what you can find here in Suffolk and they have been very effective, it is



amazing how much you can get into 30 to 90 seconds," she said.

**Go online to the "Visit" homepages to view the films.**

Do you target any of your marketing spend towards overseas visitors?



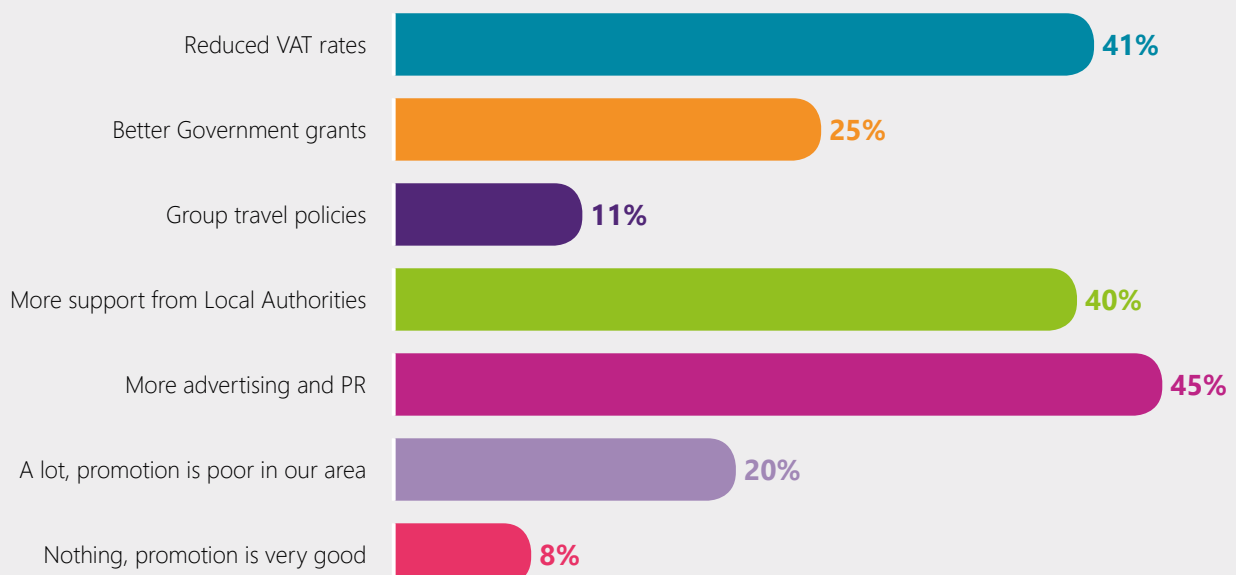
**30%** No - Not worth investing

**12%** No - I believe this is for our national body to focus on

**39%** No - I believe the regional DMO/county brands should do this

**19%** Yes

What more could be done to promote your region and improve business in your area?



BBC shows *Who Do You Think You Are?* and *Horrible Histories* prove that the past fascinates. Little surprise then that wartime history is making a mark, both for the eastern region and for one particular business.



# Remembering the 'Friendly Invasion'

In February just gone, it was 75 years since American troops arrived in the UK as part of the Second World War effort to defeat Hitler.

The arrival of thousands of American personnel to the east of England changed the region forever.

The Friendly Invasion, as it has been dubbed, immediately touched the lives of communities and individuals while altering the physical landscape forever in the form of airfields and buildings.

Look carefully and you will see such evidence in all sorts of places.

By 1943 there were more than 100,000 US airmen based in Britain, mainly in the east, with hotspots across Norfolk, Suffolk, Essex, Cambridgeshire and Lincolnshire.

This mainly rural area was exposed to culture, products, music and behaviour it had never seen before.

When Jane Larcombe moved to a new job as business development manager at the 15th century Swan at Lavenham in Suffolk, a combination of a military family background and organising army reunions made her realise what an important place The Swan was.

The hotel is home to the Airmen's Bar, which commemorates the air crews who served at RAF Lavenham during the war.

Personnel were not only warmly welcomed regulars at the bar, but they famously contributed their signatures on the walls of the bar in great numbers.

In fact, around 850 signatures can still be seen on the walls, belonging to members of the 487th Bombardment Group, stationed at Lavenham Airfield.

The 487th formed part of the 8th US Army Air Force, referred to as The Mighty Eighth.

In fact the Friendly Invasion and the 8th

USAAF's part in the war was captured forever in an artist's masterpiece, which can be found at the National Museum of the Mighty Eighth Air Force in Savannah, Georgia, in the United States.

And taking centre spot in the painting by Douglas Edwards and called A Pictorial Salute to the Mighty 8th is The Swan.

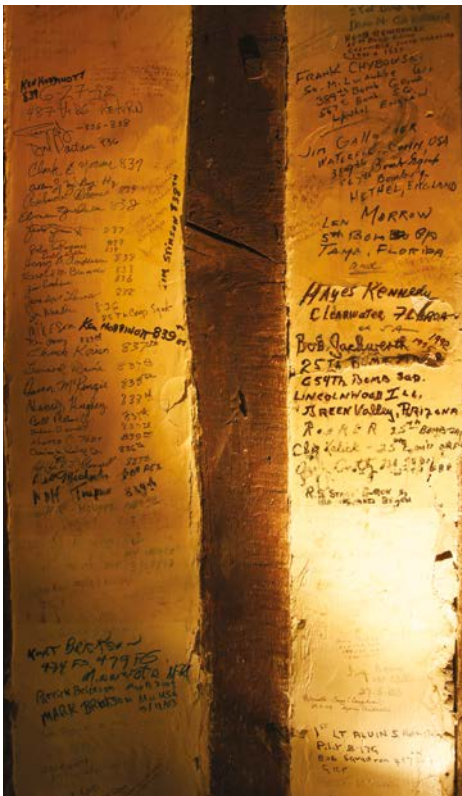
"I realised we needed to cherish and commemorate the history which links the Airmen's Bar to the war effort," said Jane.

"We are lucky that the whole thing wasn't whitewashed over in the 1950s, because it could have been seen as just a lot of scribble.

"But when you realise that a lot of those men will have lost their lives in the war, it makes the signatures all the more poignant. In the past we haven't really, as a business, proactively told people about this bar, but we should because it's important."

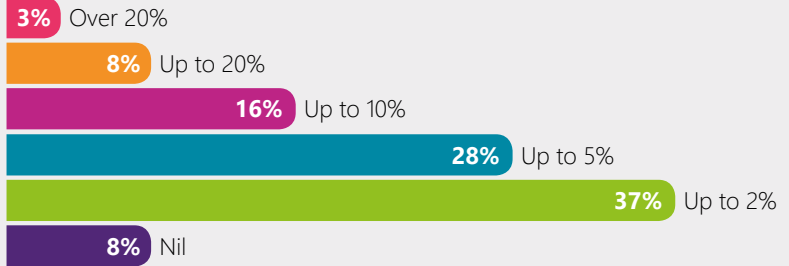
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Picture: Ian Stolerman

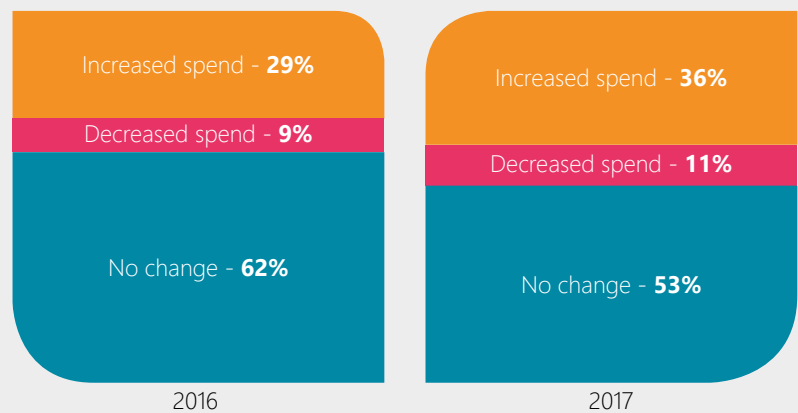


Top: The VE Day 70th anniversary in May 2015 was celebrated at The Swan at Lavenham among many other Suffolk sites. Above: Some of the 850 signatures on the hotel walls, belonging to members of the 487th Bombardment Group, stationed at Lavenham Airfield.

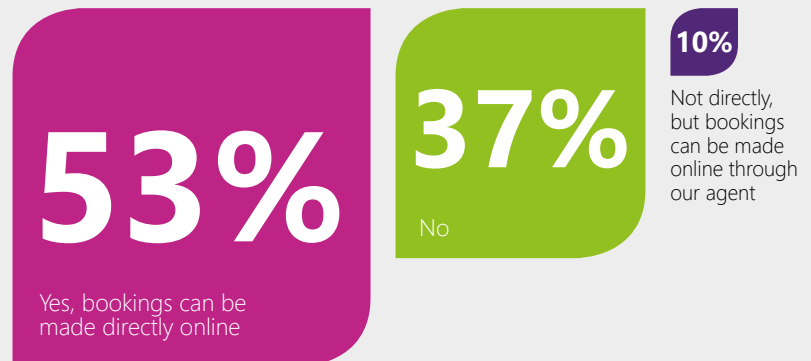
What proportion of your turnover was spent on promotion and marketing in 2016?



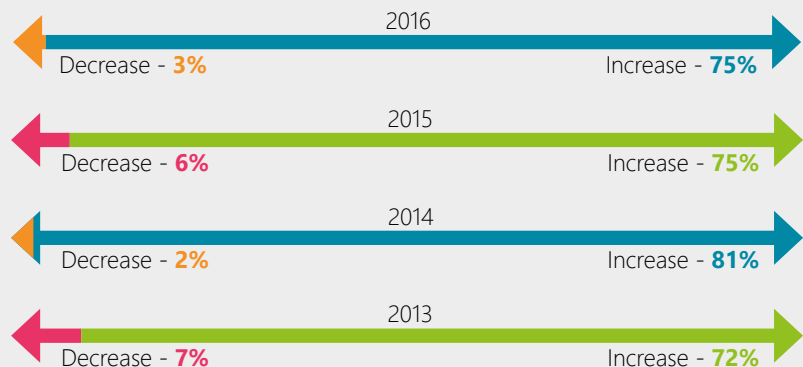
The amount we spent on promotion or marketing in 2016 and plan to spend in 2017

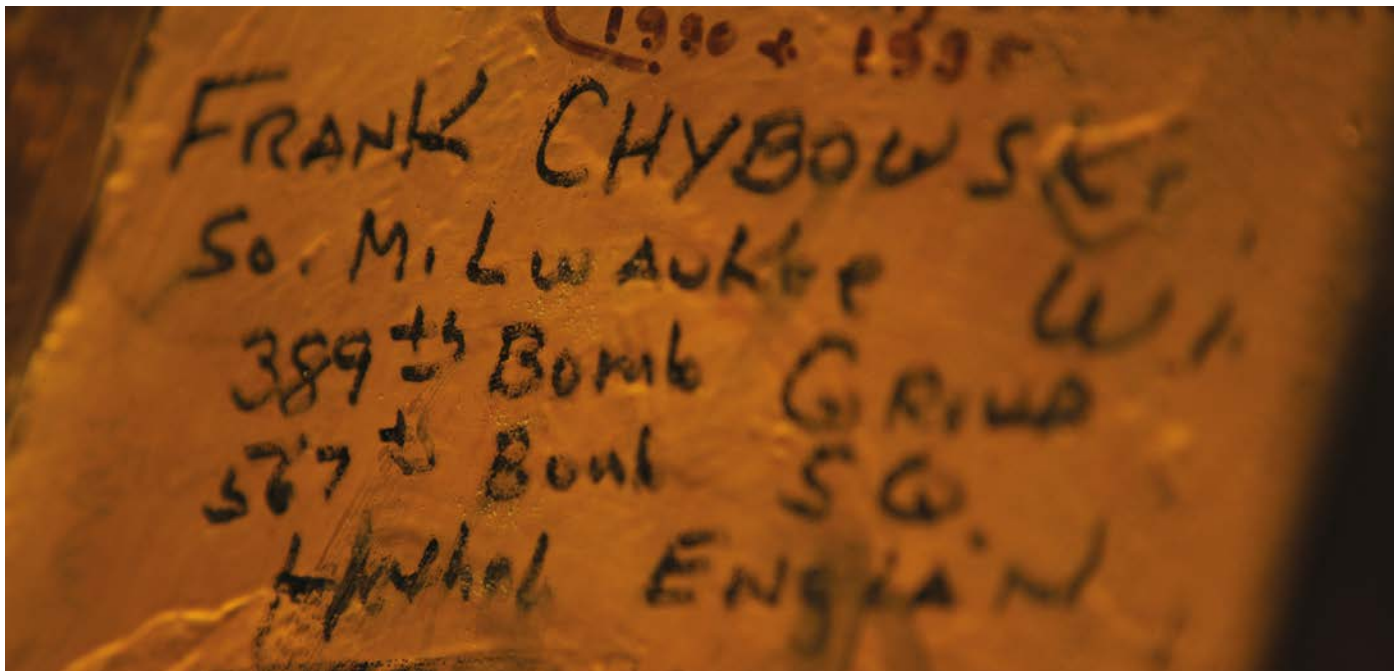


Are you able to take online bookings?



In 2016 have web bookings increased/decreased?





A close-up of some of the signatures on show in The Swan at Lavenham. Below: VE celebrations in the Market Place at Lavenham.

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Those initial thoughts have led to 1940s themed events planned in the wider Lavenham community from May 2017 through to May 2020, explained Jane.

The Swan team has helped in the formation of a local group entitled Friends of Lavenham Airfield and they have both joined forces with vintage events group, The Baker Boy Collective.

"The Friendly Invasion and its impact in Lavenham is very fondly remembered and was very well received," said Jane. "There is almost too much history with all of those names, their families and the missions they will have been on!

"We have already started to see the ripple effect of people's interest in coming over from the US to Suffolk to discover more, added to by the fact they can buy a lot of pound for their dollar.

"So yes there is a commercial element, but it is much more about the importance of the history being commemorated."

**For more information about The Swan at Lavenham and the vintage weekend in May visit [www.theswanatlavenham.co.uk](http://www.theswanatlavenham.co.uk) or call 01787 247477.**

## THE MASTERS OF THE AIR

The last of the HBO film series, understood to be nine episodes and entitled The Masters of the Air, is to be created by Steven Spielberg and Tom Hanks' production company Playtone and is thought to have a budget of more than \$200m.

Pete Waters, of Visit East Anglia, said: "The series would, for a range of reasons, be a huge boost for tourism in the region."

The Masters of the Air author Donald L Miller, scriptwriter John Orloff and Kirk

Saduski, the executive producer for the HBO film series came to England to explore.

"Getting them on the ground looking at various key sites in East Anglia and coming to the launch of the Friendly Invasion at Duxford was a real success," said Pete.

"I know that John had not been to East Anglia before so the opportunity for him to see the lie of the land was enormously useful."



## TALKING TO AMERICA

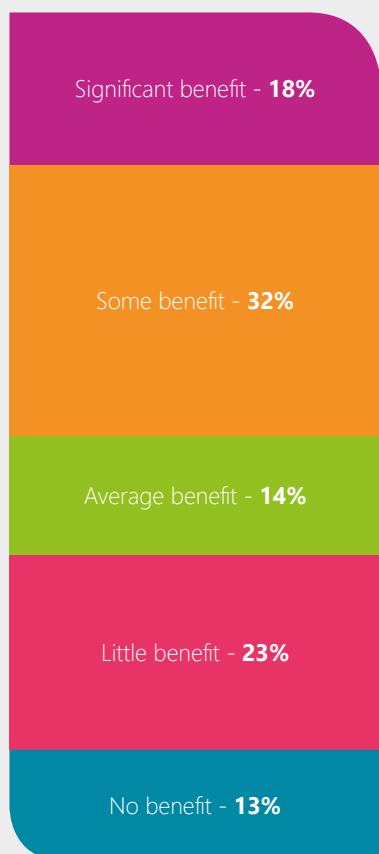
At the centre of the Friendly Invasion campaign are a series of itineraries to be introduced to the American market.

These itineraries last three, five or seven days.

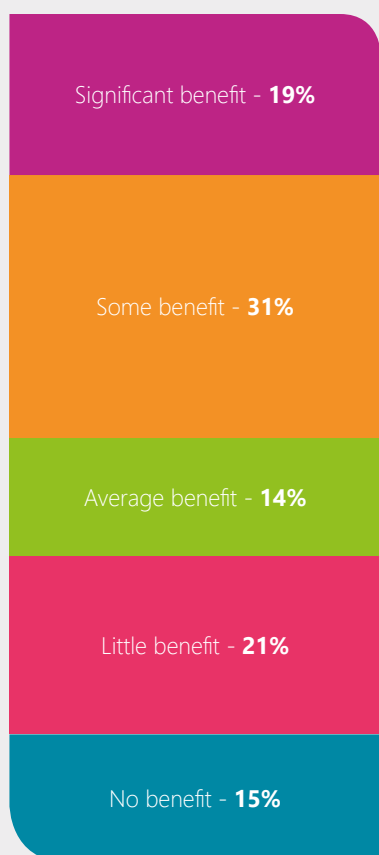
The experiences will take in historical military sites such as the recently renovated American Air Museum at Duxford, the Cambridge American Cemetery and Memorial and the 100th Bomb Group Memorial at Thorpe Abbots, near Diss, as well as tourist hot spots like Norwich Castle and Cathedral and the university city of Cambridge.

The launch event at Duxford saw guest speaker Donald L Miller, a US historian whose book Masters of the Air traced the stories of American airmen in East Anglia during the Second World War.

How beneficial is social media?



2016



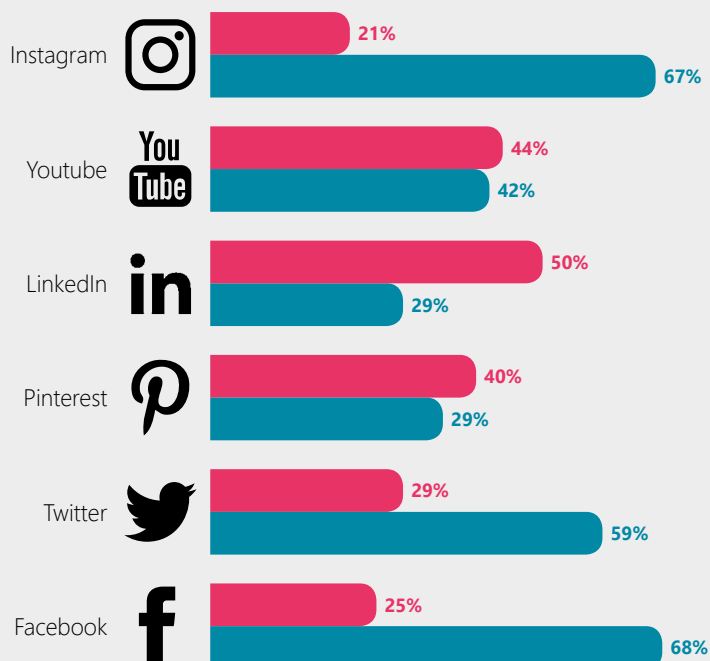
2017

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



In the last 12 months, has your social media stayed the same/increased?

Stayed the same  
Increased



The journey towards Brexit is likely to have an impact on all businesses. But how will the region's tourism sector be affected?

# You can't avoid Brexit

The region's tourism sector is used to taking on new challenges as it fights to maintain and grow its share of the holiday pound.

But last June threw up a new one, with the unknown implications of the vote to leave the EU. So how does the industry feel about the current landscape?

An initial snapshot suggested the sector was quite upbeat about the situation. According to figures published by Visit Essex, Visit Norfolk and Visit Suffolk towards the end of last year, 55% of businesses believed the vote would have no short-term impact, and 50% thought there would be no long-term effects, either. And of those that said there would be an impact, a clear majority reckoned it would be a positive one.

When it comes to the specifics of the tourism industry, a few potential issues stand out, such as the cost of holidaying at home rather than abroad.

The banking sector reports that the initial impact of the referendum result has been positive, and that the bulk of the leisure sector, including caravan parks, pubs, restaurants and well-known tourist attractions, have not experienced any major challenges to date as a result of the Brexit vote.

In the short term, the weakness of the pound provides a real benefit, encouraging staycations due to the increased cost of holidaying abroad.

Visitors from abroad are able to take advantage of significantly cheaper holidays, and the cheap pound encourages overseas visitors to spend more.

Banking experts also believe that the pound is likely to weaken further over the short term, providing a further boost to the region's tourist industry.

As well as the customer-facing brands that offer holidays and accommodation to visitors, there are large numbers of support businesses whose prospects are linked closely to the health of the region's tourism offering.

One of those is Camplings, a Great Yarmouth-based business that supplies linen to the hospitality sector.

"Most of our hotel customers hire their linen from us, so if we take on a new customer then the first thing we have to do is buy thousands of pounds' worth of stock," said managing director Richard Turvill. "This means we spend £1m a year on new linen, and this is where Brexit is changing things for us already."

Richard is referring to the sudden change in currency valuations that followed the referendum result.

"Consider the global supply chain of your pillowcases," he said.

"Where is the cotton grown, spun, woven and cut? The pound changed against the dollar and the euro overnight so, as far as the hotelier and guests are concerned, Brexit has potentially already changed the material where they lay their heads after a day on our wonderful beaches.

"What should the industry do? Reduce quality and hold prices, or maintain the standards that have contributed to the success of our tourism?"

As with other industries, there is likely to be a series of knock-on effects.

At Camplings, these include questions about the fate of EU regulations on the 20 lorries that deliver 150 tonnes of linen a week, and the impact on the oil price for a company that spends £10,000 a week on fuel.

Then there is the issue of recruitment.

"About 50% of our 200 staff are from outside the UK," Richard said. "We try hard to recruit locally but we have just had more success with eastern European staff. Staff retention has been part of our success story and we work hard to integrate and reward all fairly.

"A sense of a future and the opportunity for career progression is important for



Richard Turvill (left) says: "About 50% of our 200 staff are from outside the UK. We try hard to recruit locally but we have just had more success with eastern European staff."

our staff, but how are they feeling after Brexit? Well, a little unsettled, I guess."

Overseas workers make a large contribution to the leisure industry in the region.

According to a report by the World Travel & Tourism Council, growth in the sector across the UK is expected to hold up well this year. However, it believes the boost from a weaker pound will wear off from next year, and it has downgraded by 75,000 the number of jobs it thinks there will be in the sector in 2020.

Richard believes the growth in the popularity of staycations will continue for now, but Brexit will eventually stop playing such a large part in tourists' decisions on where to spend their leisure money. More traditional factors will come to the fore.

"I think the negativity around Brexit and Europe will carry on for another year or so, resulting in the continued strength in UK tourism," he said. "However our tourism is going to have to keep ahead of the guaranteed appeal of the sun."





Ben and Hannah Witchell in their newly-planted vineyard.  
Above: Winemaker Ben in the winery at Flint Vineyard.

Picture: Simon Buck



## A CASE OF WAIT AND SEE

As with many businesses in the region's tourism and leisure industry, it's a case of wait and see for Flint Vineyard as far as the long-term implications of Brexit are concerned.

The impact of last year's vote is likely to bring a mix of positive and negative spin-offs.

The Waveney Valley-based vineyard is a new venture – it bottled its first vintage recently and will open to the public for tours in May – but it has already been affected by the EU and our decision to leave.

Owner Hannah Witchell said the weakening of the pound against the euro had led to price increases for winery equipment, such as stainless steel tanks and oak barrels, that the business sources from Europe.

She added: "We are also planting more vines this year, and they are grown by a German nursery. Although their prices have remained the same, the less favourable exchange rate means we are paying much more for our vines than we did a year ago."

"But one of the positives that could come out of the falling pound is that rising prices of

imported wine could mean English wine becomes a more attractive proposition to the UK consumer."

One other repercussion could be the lack of an ability to apply for development grants, although it is possible the UK government will take over where the EU leaves off.

Flint Vineyard has benefited from funding in the form of a grant from the Rural Development Programme for England – a scheme mandated under an EU directive.

Co-owner Ben Witchell said: "The scheme aims to help rural businesses who are going to boost local tourism and create jobs."

"The funding enabled us to invest in state-of-the-art equipment for the winery, which is essential if we are to make premium wines which showcase not just East Anglia but also English wines on an international level."

"We had hoped we might be able to apply for similar grants to aid future expansion of the business, but it might not be possible post-Brexit if the funding is taken away."

### What are your fears about Brexit?

Short term increase in overseas travel by UK residents due to fears over future travel/visa restrictions

7%

Insufficient skillset in UK workers to meet shortfall in staffing if overseas worker numbers reduce

10%

Reduction in staff from overseas

10%

Loss of consumer confidence

18%

Increase in costs of buying goods from abroad

27%

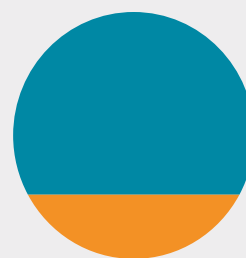
Increase in heating fuel, petrol/travel costs etc

28%

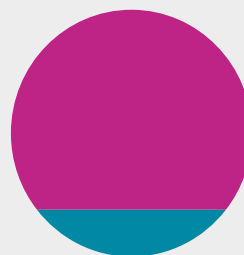
Do you feel that the Government provides enough support to the Travel and Tourism sector?



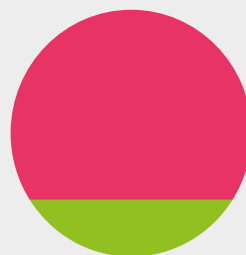
2014  
No 78% Yes 22%



2015  
No 74% Yes 26%

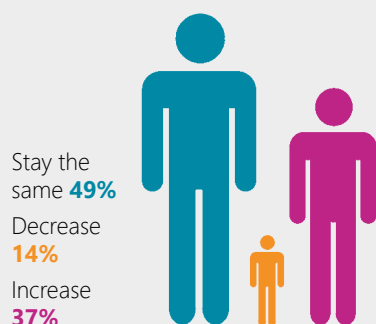


2016  
No 81% Yes 19%

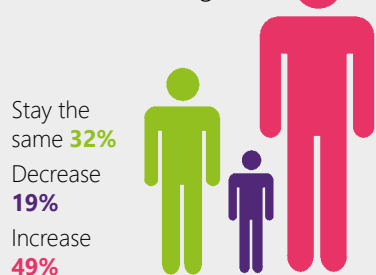


2017  
No 77% Yes 23%

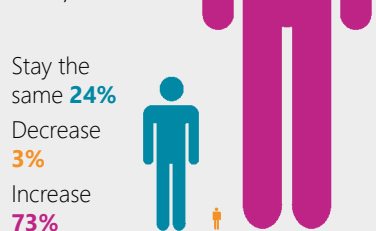
How will Brexit affect the number of overseas visitors to your business?



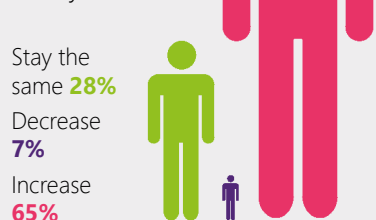
How will Brexit affect the number of overseas visitors to the region?



How will Brexit affect the number of UK residents holidaying at home? 2017/18



How will Brexit affect the number of UK residents holidaying at home? 2019 & beyond

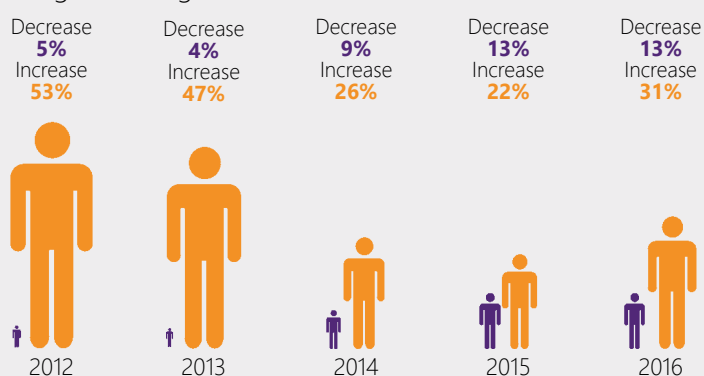


## Customer behavioural comparisons

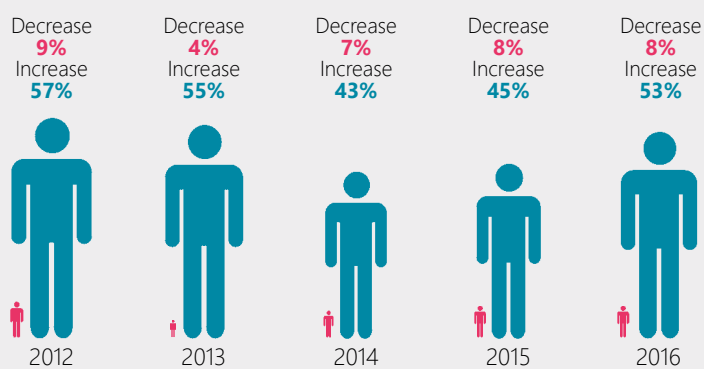
### Secondary spend



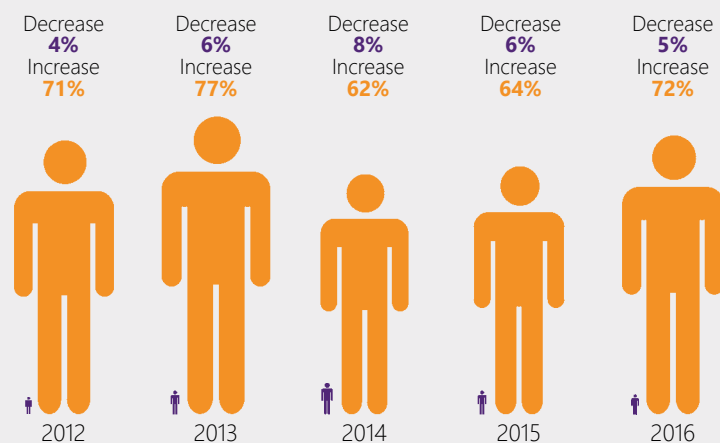
### Sticking to a budget



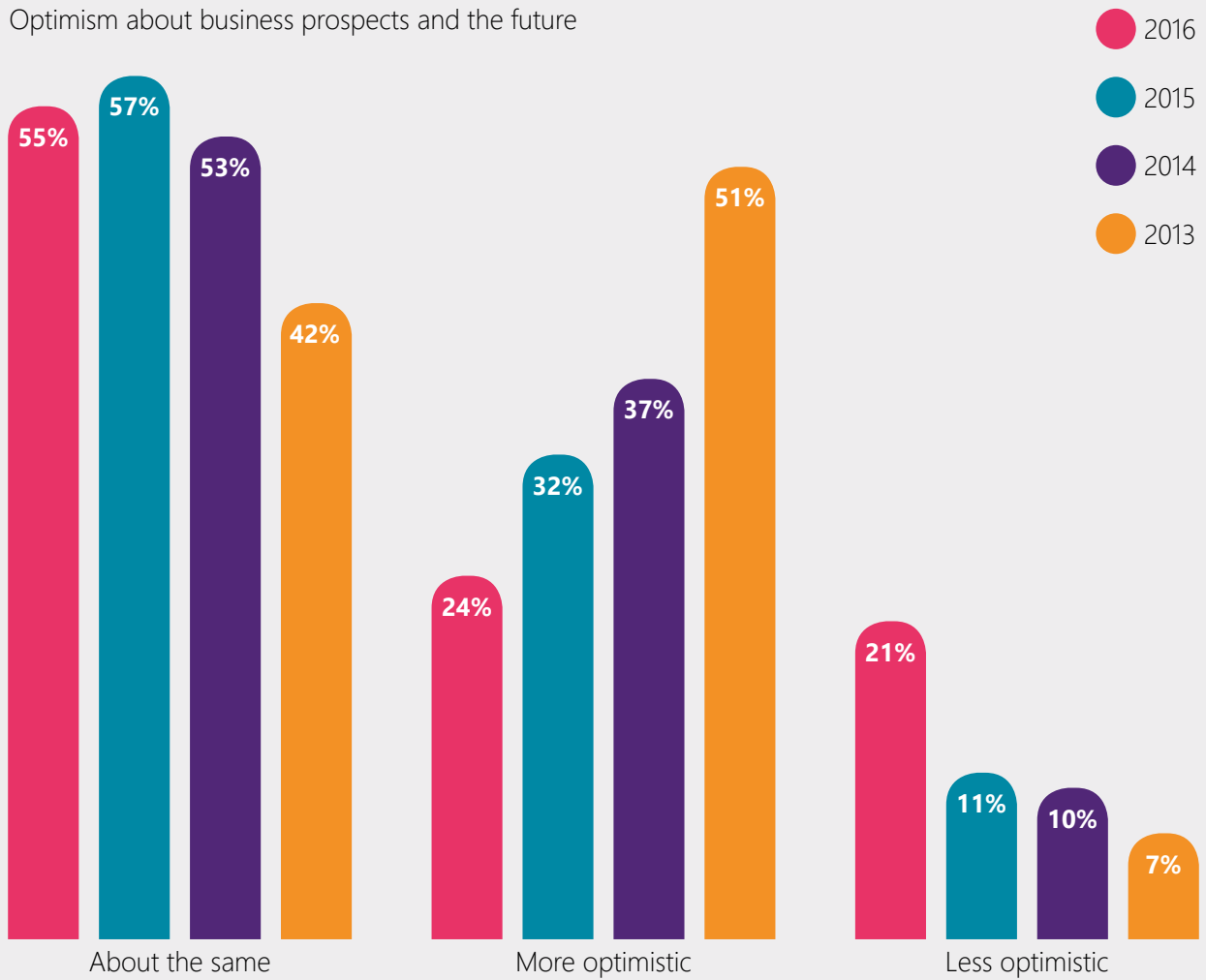
### On short stays



### Booking late



## Optimism about business prospects and the future



Which of the following measures are you planning to implement in order to improve performance and grow your business?





Suffolk has some beautiful locations for a film shoot, from the beaches and harbour at Walberswick (above) to Lavenham (below).

# A focus on location

Having your neck of the woods appearing on television and film has an undeniable positive impact on local businesses and their turnover.

This can be the case not only for the owner of the filmed location, but also for other businesses.

A one-stop service is aiming to make Suffolk the most film-friendly county in England.

Screen Suffolk, the county's new film service, officially launched in December at

the International Production Show, Focus, in London.

The business will pull together locations, talent, crew sourcing and permitting on behalf of all eight local authorities.



## RECENT SUCCESS

Last year's Tourism Business Survey brochure featured an interview with Desmond MacCarthy (right) owner of Wiveton Hall.

Shortly after publication of the 2016 brochure, Desmond was, famously, thrust into the limelight through his leading man appearance in the four-part *Normal* for Norfolk television show on BBC2.

The show was greeted with widespread warmth from the public. The impact on the business? Enormous. "Turnover was up about 35% for the year," said Wiveton Hall business manager Kim Coleman.

"We have estimated that 5% of that was down to good weather, but 30% was down to the television series.

"In all it was the best season we have ever had. From the moment the show was aired in April it was very busy and that lasted through to closing at the end of October.

"People loved the show, they were very kind about it. "They wanted to come here,



have lunch and support the business, but then to actually meet Desmond and perhaps his mother Chloe, the children and the dogs. He captured people's hearts."

Whether that impact continues into the early part of 2017 remains to be seen, but when the second, six-part, series airs there is bound to be a new wave of interest.

"You simply can't put a price on this sort of marketing," said Kim. "It played to the nostalgia of North Norfolk, a more innocent time, travelling back a couple of decades".

For Richard Bainbridge (pictured above

right), winner of the BBC's Great British Menu in 2015 and something of a veteran of the show as a four-time contestant, the appearances had a life changing impact.

Richard is owner and head chef at contemporary bistro style restaurant Benedicts in Norwich and formerly of Michelin-starred Morston Hall.

"In the years when you don't get very far, the results are maybe a couple of weeks of busy tables. But the year I won paid for the restaurant. Bear in mind when 4.5 million people are watching, the conversion rate to bookings doesn't have to be high in percentage terms to have an effect.

"It's much more about the national platform it created than the local one – as a small independent business like ours, you can't afford to advertise nationally, so the television is a massive boost.

"But you have to be yourself on the television, people relate to the personality on the screen and want to meet that same person when they come in to eat."



The idea is clear – to attract money into the county and to a wide range of businesses, including location providers, hotels, other accommodation providers, food businesses and a host of other types of business.

Screen Suffolk director Karen Everett said: "In 2015 £102 million was spent on film and TV production in the English regions, during 9,000 film days.

Screen Suffolk is dedicated to ensuring Suffolk sees its fair share of this revenue and opportunity. We are committed to attracting 100 days of filming into the county in our first year and quadrupling this by 2020.

"We chose the Focus show as the perfect event for showcasing Suffolk to the global film market.

Focus is the biggest location production show of its kind in the UK and we invited 100 key producers, location managers and specialist film journalists, to introduce them to the benefits of filming in Suffolk.

"We were already thrilled with the filming we attracted before our launch, including

Richard E Grant presenting a Sky Arts production and a Medicines Sans Frontier advertisement at Bentwaters Parks airfield."

"Suffolk's incredible locations also include The Museum of East Anglian Life and Framlingham's lovely market square."

Screen Suffolk can access various locations, including picturesque villages, historic buildings and windswept beaches. But there are also urban streetscapes, dockyards, estuaries, derelict buildings and airfields in abundance.

Jennie Jenkins, chair of the Suffolk Public Sector Leaders Group, said: "We see the best our county has to offer every single day and we're really looking forward to sharing Suffolk with the world on both the big and small screens.

But more than that, we know exactly how much talent and drive there is here and making that available to the world of film will bring more jobs and more opportunities to the people of Suffolk, as well as unleashing their full creative potential on the world of film making."



Orwell Country Park (above left) and RAF Bentwaters (above) are ideal places for use as a film location. Below: Karen Everett and Rachel Tuckett at the launch of Screen Suffolk.



As the disabled and elderly market grows, some businesses are taking a proactive stance on the matter. Yes the legislation says you have to provide certain features – but why not go further and make it part of your offer?



# Access all areas

There is a website called [disabledaccessholidays.com](http://disabledaccessholidays.com).

Why this comes as a surprise to anyone involved in selling accommodation should be a surprise in itself.

Across some parts of the industry there has been the uncomfortable view that providing accessibility is an expensive chore fuelled only by legislation.

But when you consider the size of this market, surely there is a business decision to be made despite the lawmakers and the technical obligations?

Mollett's Farm in Suffolk prides itself on the investment made into accessibility.

All six luxury cottages and studios have high-spec additions to ensure access is excellent. Their online accessibility statement makes for fascinating reading, detailing as it does precise measurements for the width of doors, type of flooring, distance between car parking and accommodation, location of support bars, shower seat height, presence of alarm pulls and underneath-bed space for hoists.

Those of us fortunate enough not to have to consider such concepts may not immediately understand their importance. But for this growing customer base that understands clearly what they are looking for when going on holiday, it's vital information.

"We had to develop a specific mindset", said Richard Ayres, who runs the business, which also includes five caravan pitches, with his wife Sasha. They are near the coast and Aldeburgh, Snape, Southwold, Woodbridge and Framlingham are nearby.



With Mollett's Farm in Suffolk, Richard and Sasha Ayres (pictured) wanted to create something which was attractive to all guests but also inclusive for disabled visitors.



"It wasn't about building something which was purely accessible friendly, it was about not excluding people who are disabled.

"What I mean by that is this. We stayed in an accessible room provided by a sector-leading international company. It was awful, like a hospital.

"And then we stayed at the RNLI College in Poole in an accessible room. It was marvellous, a lovely space to spend time, which happened to have accessibility features.

"That was a turning point for us, we realised it was possible to create something attractive which also has these extras."

The end result is that perhaps only 5% of guests benefit from and use the features at Mollett's, but no one would be surprised if that increased over time.

On the water, Waveney Stardust is a

registered charity whose aim is to ensure anyone can enjoy river cruising, including disabled people and the elderly.

Over 20-plus years Waveney Stardust cruisers have carried more than 60,000 passengers and travelled more than 75,000 miles on the Broads.

The charity has created purpose-built modifications to landing stages and boats to make cruising for the disabled and elderly safe and enjoyable.

Ginnette Lovegrove, chairman of Waveney Stardust Trust, said: "The mission is to provide safe, subsidised and enjoyable river cruises for the disabled and/or elderly, people who would not otherwise be able to access the pleasures of the Broadland waterways and their family and friends.

Oli Franzen, skipper and marketing for Broads Tours in Wroxham, said the



Do you provide/have facilities suitable for disabled use?

Yes **72%**

No **28%**

How suitable is your business offering to the disabled?

Access all areas **19%**

Nearly all areas **30%**

Most areas **18%**

Some limited access **15%**

Minimal access **6%**

Premises/business not suitable **12%**

Does any of your marketing and advertising spend directly target the impaired and disabled?

No **88%**

Yes **12%**

What, if any, are the barriers to providing a greater disabled access?

Planning permission/legislation **12%**

Cost of implementation **25%**

Lack of demand **15%**

Lack of information/training issue **3%**

Suitability/access issues with our premises, location, and/or product/service **45%**



With specially-adapted access for boats, the Broads is open to all.

business took accessibility issues very seriously – for good reason.

“On most trips we will use some sort of disabled access.

“On two of the four main trip boats there is a wheelchair lift, and all four are wheelchair accessible.

“The lift is quite something to see and our visitors love how easy and effective it is, they often comment on how ingenious it is – users don’t have to get out of their wheelchairs at all to get on board.

“The lift takes people to the top deck, where they get the best panoramic view – which reflects what we are trying to do here, to get as many people out to see the Broads as possible.”

The business also has a day boat adapted for wheelchair access.



Oli Franzen from Broads Tours: “The lift is quite something to see and our visitors love how easy and effective it is, they often comment on how ingenious it is.”



# New path to adventure

Redundancy can so often lay new paths for people. So it was for Ginny Wilson-North – quite literally.

Ginny and her husband Mark have launched a new business based on walking the Norfolk Coast Path, with more than a little comfort thrown in. The couple decided to launch their holiday business after Ginny was made redundant from her job with the Red Cross.

"I went from one kind of tent to another," she said.

"I was walking Hadrian's Wall and had time to think about my future and what I wanted to do was something that I really enjoyed, and this is it."

The result? The couple, from Colby near Aylsham, launched MarGins (a compound of their first names which also alludes to the "edge of the world") in December, a selection of walking and glamping holidays appealing to both dedicated trekkers and casual tourists looking for something a bit different.

Starting point for the holidays is Hunstanton, and the drive from their home village is just part of the job Ginny loves. "There's such diversity in our coastline from the cliffs at Sheringham and Cromer to dunes and marshes," she said. Ginny has been walking various sections of the 84 miles of Norfolk coastline to add to the pack they give the walkers, making notes of signage, places of interest and places to eat.

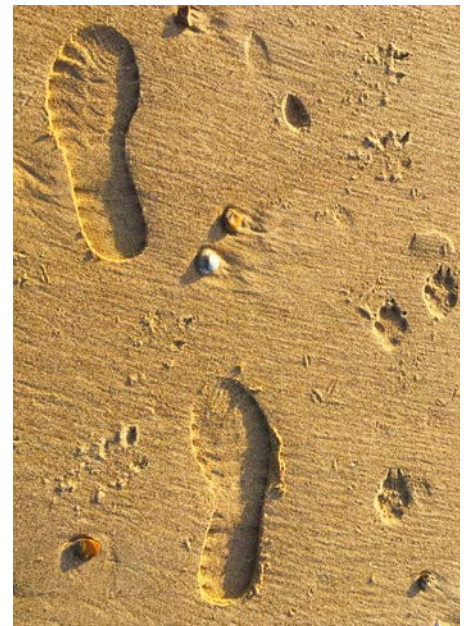
Looking after the customers' needs is paramount. Guests can choose from three holiday options – a three day, 38 mile walk from Cromer to Hopton-on-Sea; a four day, 46-miler from Hunstanton to Cromer; and the full 84 miles of the Norfolk Coast Path from Hunstanton to the Suffolk border, taking six days. Glamping accommodation is set up each day on campsites on the Norfolk Coast Path, with luggage transferred to the next destination each day.

Ginny said: "We've designed the routes to appeal to all levels of walker. "Ramblers and experienced trekkers can stick to the

Step outside the front door and look around you. What do you see? Ginny Wilson-North saw a tourism business opportunity combining the natural environment, physical exercise and some comfy extras.



Ginny and Mark Wilson-North, pictured with dog Brylie, who have launched walking and glamping holidays along the coast.



route or go further by checking out some of the many 'off-piste' paths.

"The less experienced can do as much or as little walking as they like – and even pop on the Coasthopper bus if they want a rest.

"The Norfolk coast is blessed with some of the most beautiful beaches in Britain. For anyone interested in wildlife there are world-renowned reserves all along the coast. It's the perfect place for walking and glamping – especially when it's relaxed and hassle-free. Add to that the fact the trips are dog friendly and MarGins will supply everything you need – "except the dog", said Ginny.

"When setting up, smaller start-ups don't always think about the implications of insurance," says Rachele Kelsall, head of community development at insurance

brokers Hugh J Boswell.

"We work with all sizes of business within the tourism sector. It is such a diverse sector that it can be hard to fit into a predetermined "standard" box.

"It is important to make sure you are covered for all eventualities. If you have an idea for a new start-up or you are looking to expand business it's important to speak to an expert.

"Making sure that you have the best insurance in place is vital as claims can have a huge impact on your business."

MarGins' season runs from May to September, but their first guests took a B&B option so they could come in winter. And the couple is hoping to branch out to offer family options and specialist breaks, including those for bird watchers.

Festivals fill lots of space in the tourism sector. Big or small, hugely profitable or barely washing their face, private business or charity, the type and style is enormously varied. Clearly identify your vision, know your market, build your brand, get your prices right and be patient – that's the message from one festival founder who had no previous experience of the market before launching his own in 2013.



Glen Moulds says:  
"We have listened to customers, which included investing more than £10,000 improving the toilets. We have kept pitch fees very low in comparison to other festivals, but the other part of that deal is we control pricing and ask vendors to sell child portions."



# Festival aims to keep it local

Glen Moulds is full of passion and verve when he talks about how his festival was founded, why it offers what it does, its focus on affordability and the wider family which has grown over the last four years of putting on Homegrown in Suffolk.

Sparked by a conversation with his daughter Jade, the eldest of his four girls, who had been through the experience of Reading and Leeds, the "long drops", the high costs of food and drink and the questionable behaviour of some fellow festival goers, Glen came up with a plan.

That plan developed further through conversations with musicians struggling to make the jump from pubs and clubs to larger markets. Festivals were often the targets, but were hard or impossible to get signed up to.

Glen, a retired detective who runs the Suffolk Academy health and fitness centre

in Barrow near Bury St Edmunds, said: "We wanted an ethos. A huge part of that was having musicians and vendors from East Anglia only, hence the name Homegrown."

"We have listened to customers, which included investing more than £10,000 improving the toilets. We have kept pitch fees very low in comparison to other festivals, but the other part of that deal is we control pricing and ask vendors to sell child portions."

"They still make money and our customers are happier because they are paying £3.80 a pint, not £8, while we are able to support our vibrant local talent and live music culture."

In year one we had 1,000 visitors through the Homegrown gate.

This has gradually increased to a projected 3,000 when this year's event goes ahead on June 9 to 11. That figure will



reach capacity at 6,000 said Glen.

He said: "So far we haven't made money, although this year we should turn the corner. Patience is key in all this. If you want a fast buck or a stress free existence? Wrong industry."

His ambition is to get to 6,000 with lower costs, because of their investment in key facilities, but keeping the family feel.

As well as music, Homegrown features permanent toilets, bars, a wide variety of food choices including vegan, vegetarian, dairy free and gluten free, children's activities, including a toddler zone and silent disco, as well as showers, yoga and archery.

Entrepreneurial operators creating destination venues catering imaginatively for well thought out markets are helping buck a national decline in the pub industry. How is this approach being implemented in our region?

# A wake up call for change

In 2009, at the height of the recession, the UK pub industry saw a record 52 pubs closing per week, according to the British Beer & Pub Association.

According to bosses at Adnams, well known for its brewing and hotels, this was the wake up call that sparked a positive change in their business, leading to a clearer future within both their managed and partnership properties alongside a new generation of entrepreneurs.

Adnams' managed pubs include The White Horse in Blakeney, The Ship in Levington on the River Orwell, The Plough at Wangford, The Bell and Harbour in Walberswick and Southwold's Crown and Swan.

"Recognise the market you are in and what your consumers want," said Victoria Savory, head of marketing at Adnams.

"Historically, pubs had a clear definition – a place for grown-ups to drink and relax, or as an informal setting for meals.

"Today, they compete in a broad and bustling arena, over-run with cafes, restaurants, fast-food chains, day attractions and even shopping centres. Pubs must compete with all of these.

"Secondly, stand for something. With stiff competition, you need to stand out from the crowd. It can be what you do, for instance a special dish or recipe, or how you do it, such as décor or service."

Examples include The Crown at Snape, which rears its own pigs and sheep, and grows vegetables on their allotment. The White Horse in Blakeney gives guests binoculars and wellies, daily tide times and

picnics to enjoy in North Norfolk.

The Eels Foot Inn at Eastbridge near RSPB Minsmere, a famous coastal nature reserve, has installed a childrens' play area and bike hire to enjoy the surroundings.

"Be flexible, adapt and diversify," added Victoria.

This approach was taken by The Bell at Walberswick where the 'Barn Café' was developed to serve ready-to-go teas, coffees and sandwiches.

The café enables the business to respond to significant seasonal peaks and troughs in trade, and operationally it's a 'coping mechanism' for the busiest trading time of the year. Produce served has helped tap into a younger market, with a teenager's menu served alongside a children's menu.

"Another important approach is the smaller thoughtful touches that consumers appreciate, whether it be soya milk and allergen-free products, plastic cutlery and plates for children, dog snacks and watering stations, or even a welly boot wiper. Invest the time to get your place and identity right."

Overall, said Victoria: "The wake-up call of the early noughties caused us to reconsider every aspect of our pub and hotel estate, and we are now more responsive, more efficient and better placed to succeed in the future."

For Amelia Nicholson and Marcus Seaman, who have recently reopened the freehold, rural Brisley Bell between Dereham and Fakenham after significant redevelopment, it has been about building a pub that they could identify with as



potential customers.

"We saw a gap in the market and realised that the 1.5 acre site had the space for the level of development needed – two restaurants, kitchen, staff room and more toilets – to create something both locals would be able to use as a friendly drinking pub and where imaginative and tasty food could be served.

"We are also going to develop six rooms and five glamping spots.

"The location was crucial, having a local market was important, but so was the fact it's a wonderful setting overlooking a common, where people from the south of the county will travel to meet their coastal friends halfway.

"The ambition was to create a pub that we wanted to go to, a usable place that is also something of a curiosity because of its setting."





## BE BOLD AND BELIEVE

Back in 2009 when the buzzword "staycation" was first coined, Richardson's saw an opportunity and took a strategic decision to invest in its holiday division.

Management and shareholders embarked on a strategy to focus on the core strengths of the business – family holidays on land and water.

As a result, the firm began a programme to divest itself of its inns and restaurants, to organically raise the funding required for its growth plan.

Armed with a belief in the strength and future growth of their sector, Richardson's, which bought its first Broads cruiser back in 1944, began investing in both its land and water based holiday operations.

Investing £700k per annum building their next generation Broads motor cruisers, the family run business has invested over £6m in its hire fleet since 2009.

The investment strategy also comprised two acquisitions – day boat hire operators Fineway Leisure and George C Smith, both based in Wroxham, giving the business a foothold in the day hire market from one of the Broads' highest profile destinations.

Richardson's teamed up with law firm Howes Percival to help implement the strategy and the firm has acted on disposals and acquisitions as well as providing property and employment law



help too.

Greg Munford, CEO of Richardson's Leisure: "Working with advisers who are not only experts in their individual legal fields, but also have an intimate knowledge of the tourism and leisure sector, was vital."

Today, Richardson's operates the largest fleet of cruisers on the Broads, with more than 300 boats, attracting about 75,000 holidaymakers to Norfolk each year.

Last year saw Richardson's increase investment in their holiday offering in

Hemsby with £2.5m invested in their Seacroft Holiday Village and Hemsby Beach Holiday Park. This included refurbishment of the entertainment facilities and existing accommodation and the commencement of a caravan development with 30 caravans and bases, new roads and infrastructure, including future provision for WiFi.

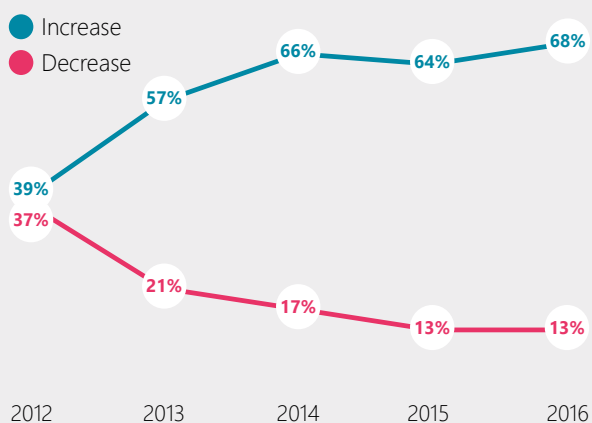
Mr Munford commented: "It was an ambitious transformation, at a time when many other businesses were being cautious. It taught us to be bold and have belief in what you do, and I think there are parallels between 2009 and now."

"Our aim was to make the company the 'go-to' Norfolk Broads brand, with an ambition to 'expand, excel, and excite' both customers and staff."

"The programme has given us a real vision and the whole team is now focused on what we do best and on trying to give our customers the best possible experience."

Due to the success of this strategy Richardson's has gone from making a loss to making a profit. The increased profitability of the business will enable Richardson's to continue to reinvest with further capital invested in their Hemsby site and £700k in next generation cruisers for the 2017 season.

## Turnover in 2016 and comparatives



If turnover increased in 2016, expected in 2017?



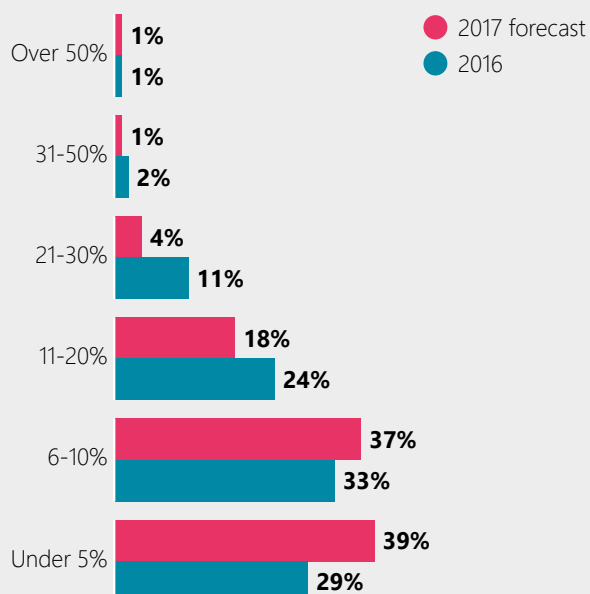
Don't know - 8%  
Unchanged - 14%  
Decrease - 6%  
Increase - 72%

If turnover decreased in 2016, expected in 2017?

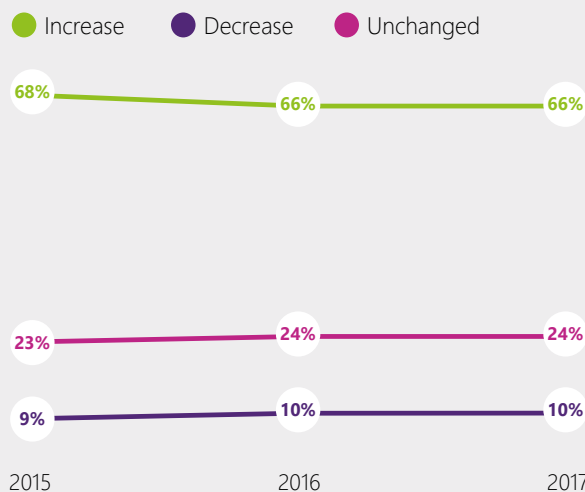


Don't know - 15%  
Unchanged - 26%  
Decrease - 24%  
Increase - 35%

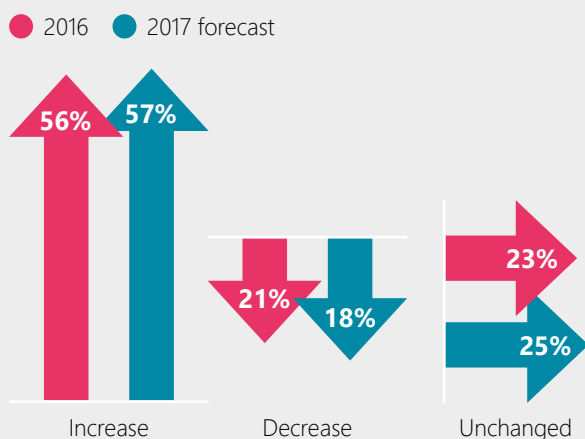
Movement in increased/anticipated increased turnover...



## Forecast turnover in 2017 and comparative forecasts



## Profit levels in 2016 and expected for 2017



Movement in decreased/anticipated decreased turnover...





The lack of rural connectivity is annoying enough for residents – but it can cause even more problems for tourism businesses that can't get their guests online.

# It's all about connections

It used to be parking, satellite television and the distance to the nearest pub that topped the list of questions from potential visitors to accommodation providers.

Today, though, connectivity is just as likely to be a demand from guests. Being able to get online is no longer a luxury, and many visitors expect it to be a standard service. Hotels, caravan parks, B&Bs and holiday cottages in the most rural parts of East Anglia face losing custom if they

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can't provide it.

Rachel MacSweeney runs holiday-rentals business Winterton Cottages, which has a portfolio of 10 cottages in the Norfolk coastal village.

She says connectivity is absolutely vital, both in terms of running her own business and in terms of providing a facility for her customers.

"It's one of the key criteria guests look for when booking a holiday, whether they need it for work, keeping in touch with friends and family via emails or social media, or for games and streaming entertainment online," said Rachel, who owns some of the cottages herself and manages the others on behalf of third parties.

"When I'm booking a holiday for myself, it's one of the first things I look for, so I've seen this from both sides of the fence, and I know it's now an essential facility for holidaymakers."

Rachel bought her first cottage in 2010, and she said she took the decision immediately to install WiFi.

She said broadband access was also crucial for her own business operations.

"It's essential for me because everything is done online," she said.

"Whereas years ago, a holiday-cottage agency might have relied on a brochure and telephone bookings, our website is now our main marketing tool, and we wouldn't be able to survive without decent digital access. I do still get a few telephone bookings, but they are very much in the minority.

"I have to post regular updates, news and offers, but there isn't 4G in Winterton so I rely on WiFi. I couldn't run my business without it, and if a tourism business is in an area where there is no broadband, that would definitely hold it back."

For Richardson's, which offers a range of services in Norfolk including accommodation and boat hire, the desire for connectivity is changing from a "nice to have" to a "must have".

Chief executive Greg Munford explained that in the business's new development



at Hemsby, cabling had been installed to allow for a robust WiFi.

"All new caravans will have WiFi as we replace the existing chalets.

"It's completely linked to demand, we are making sure we are future proofing the business as much as possible.

"Last year we installed WiFi through EE to all of our 300-plus hire cruisers, which is reliant on the mobile signal, but we felt it was again meeting demand.

"While it feels like a competitive advantage from a marketing point of view to start with, I feel that as time passes it will become an expectation and a necessity from a business perspective – we can see that by tracking the levels of usage already registered."

Although culture secretary Karen Bradley said in December that another 600,000 homes and businesses in some of the more remote parts of the country could soon be connected to superfast broadband, many are sceptical about government pledges.

There have been accusations in the past that not all announcements involve "new investment".

Last year, meanwhile, Anna Soubry, a former minister for small business, said she was sceptical of some of the statistics bandied about because the official claims did not seem to tally with feedback she was receiving in the "real world".

That's a view Rachel subscribes to. She said: "We supposedly have superfast



Holiday business owner Rachel MacSweeney says connectivity is one of the key criteria guests look for when booking a holiday.

broadband here in Winterton, but in reality it's not brilliant."

Many sites and attractions popular with tourists are unfortunately located in areas not covered by the super-fast programme, which is eventually expected to cover 95% of Norfolk.

Similarly, the rollout of 4G networks eventually expected to cover about 95% of the country is slow in coming, and may not reach popular tourist areas and destinations.

The challenge is finding a business case to deliver better broadband to small rural hamlets and pockets.

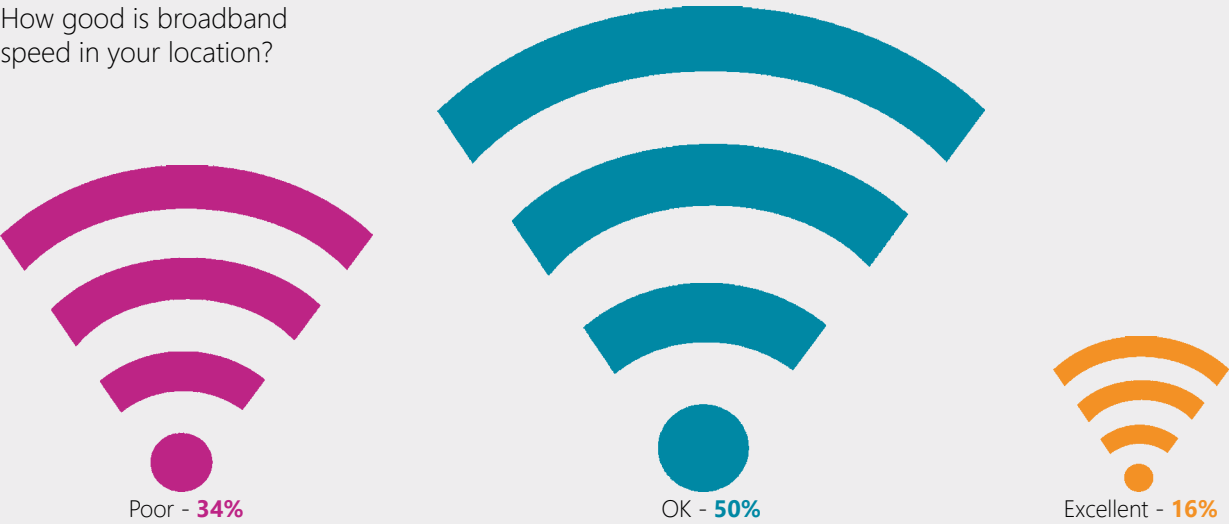
But until the government delivers genuinely complete coverage across East Anglia, the fear is that some parts of the sector could be fighting to keep up.



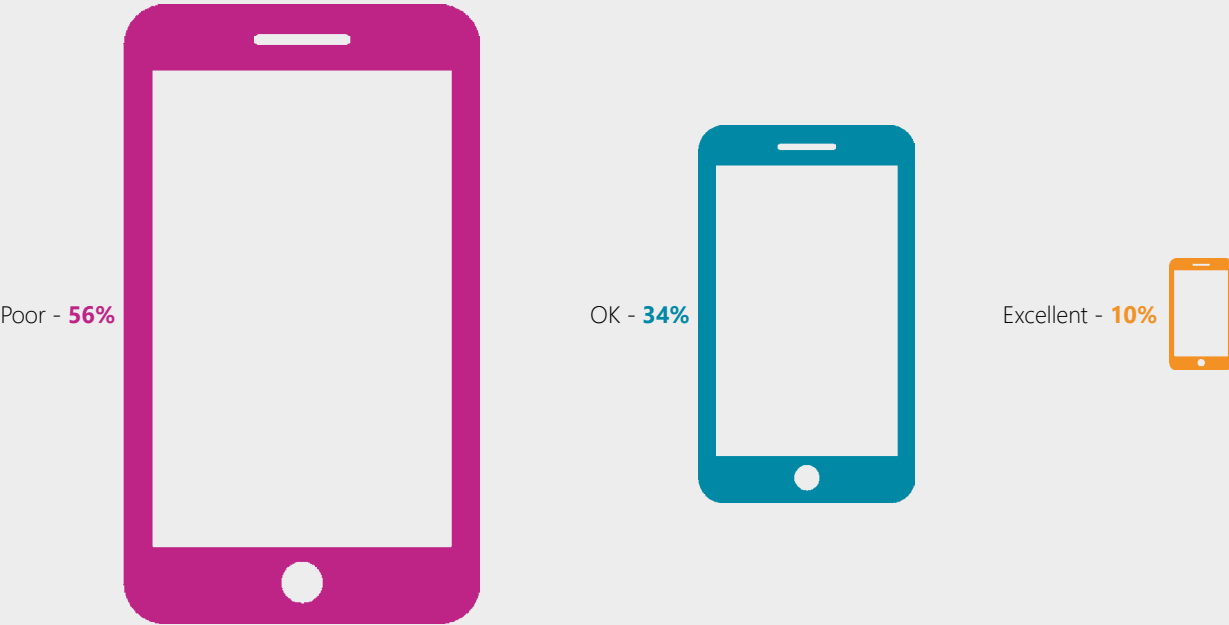
Greg Munford, from Richardsons holiday park, says: "We are making sure we are future proofing the business as much as possible."



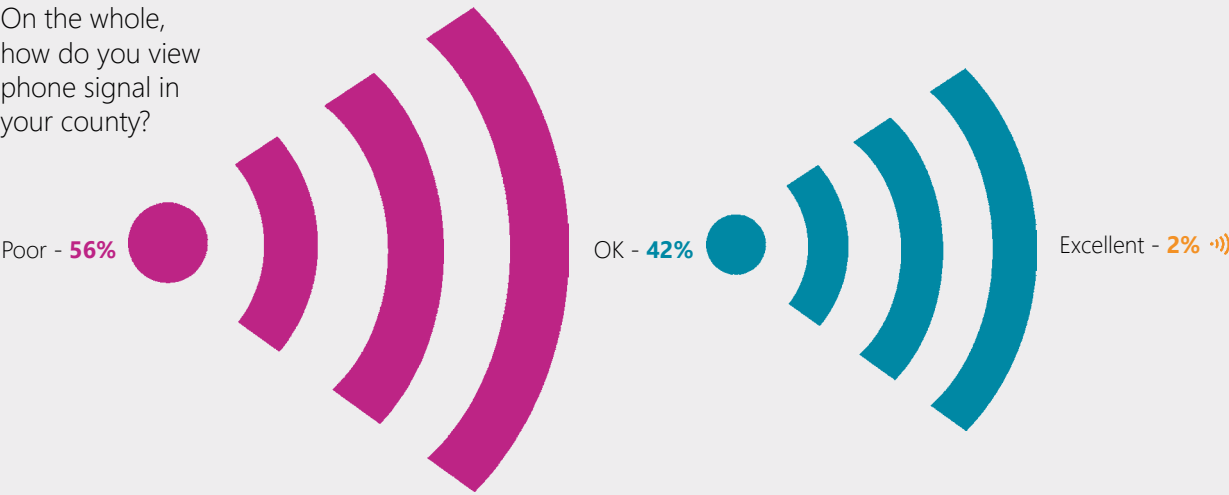
How good is broadband speed in your location?



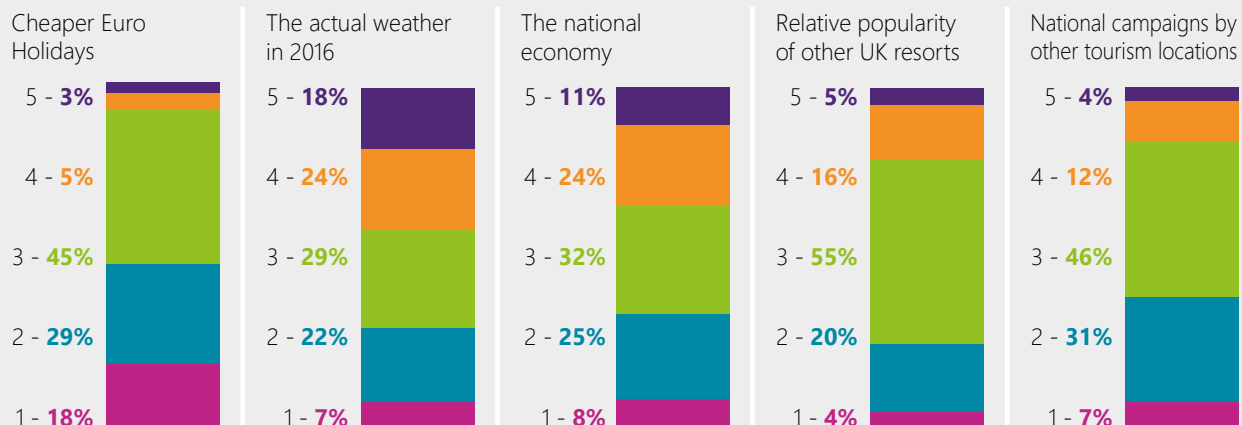
How good is mobile phone signal in your location?



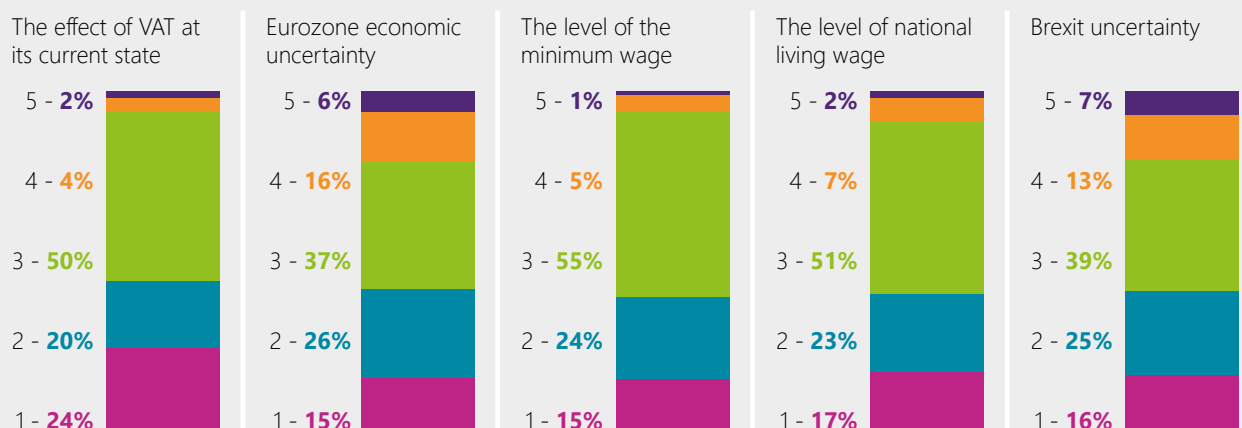
On the whole, how do you view phone signal in your county?



How do/did/will the following aspects affect your business? 1 being very negative, 5 being very positive, 3 being neutral

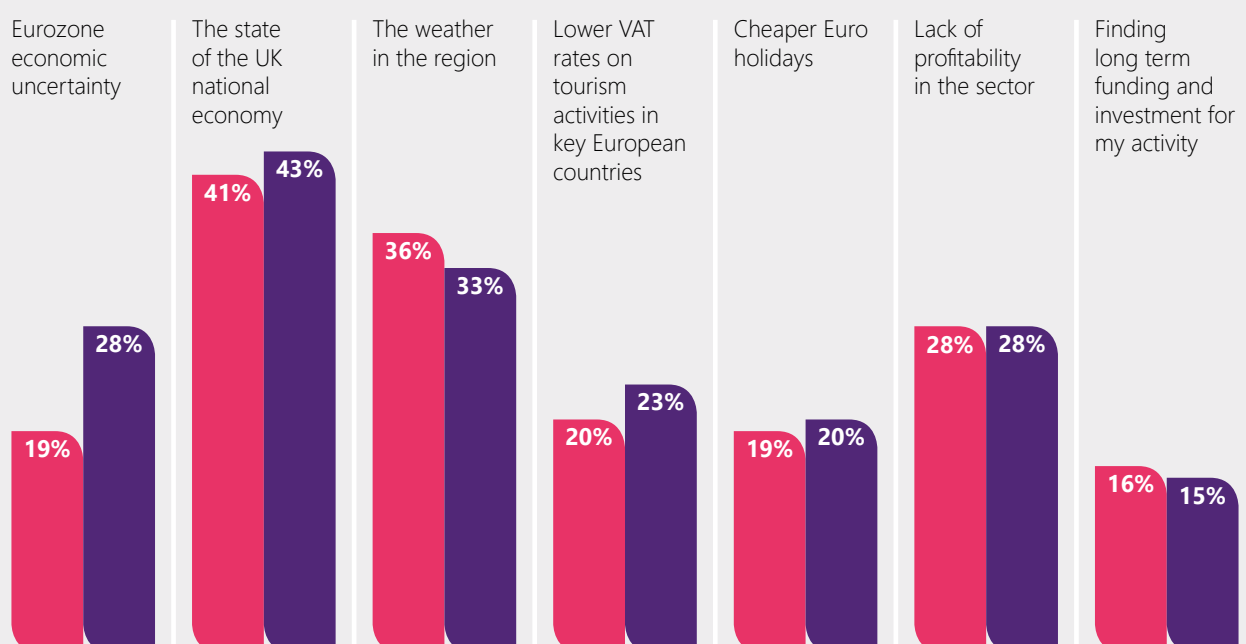


How do/did/will the following aspects affect your business? 1 being very negative, 5 being very positive, 3 being neutral



Which key aspects worry you most about the future?

2016 2017





Brexit will hit staffing in the hospitality sector, meaning steps to encourage more young people in the UK to look to the sector for their careers must be taken now. That's the message from a leading academic in the field.

# Edging ahead in hospitality

Graduates of the Edge Hotel School are now spread around the hospitality sector both in the UK and internationally, helping address the huge levels of recruitment pressure within the industry.

The University of Essex project features Wivenhoe House Hotel in Colchester as part of its offering, a 40 double bedroom hotel staffed partly by full-time staff and partly by students on a two-year BA accelerated degree in hotel management.

The school celebrates its fifth anniversary this year and is continually providing recruits to various levels of employment, especially lower management levels with a view to fast progression based on good skill sets established pre-employment and a clear commitment demonstrated by the two-year educational path trodden.

Principal Andrew Boer (pictured) said it was time for the sector to step up to the mark in advance of Brexit, which had increased existing industry concern about staffing difficulties.

"Following the triggering of Article 50 at the end of March, the British Hospitality Association (BHA) became the first major



Andrew Boer

UK industry to publish a plan which seeks to manage the disruption that will be felt by the industry.

"Its principal focus is to ensure continued labour recruitment to the industry, in particular on the need to recruit a

higher proportion of UK employees to all roles and levels.

"It is a sobering fact that, according to an official report, up to a quarter of the labour force within the industry has been recruited from the EU and the number of employees needed in the future is highly likely to increase.

"Equally sobering is the fact that many people don't believe that a career in hospitality is viable in the long-term. There is a considerable lack of knowledge about career progression and opportunities within the industry.

"The Edge Hotel School aims to confound some of these issues and perceptions by providing higher education courses which



challenge the current, often outdated university approaches to developing young professionals for this industry. "

A combination of academic rigour and provision of management experience within a fully commercial hotel meant graduates took up employment knowing they were equipped to start long term and rewarding careers, said Andrew.

"At a time of tumultuous change, the BHA has had the courage to identify that things cannot continue as they were before and to both challenge current practices, and initiate new ways of working towards our future. I call upon those institutions who educate and develop the young professionals of the industry to do the same."

The school will expand to offer a second degree from September – events management with hospitality.

It has also been recognised for its close work with prospective employers for its graduates after being shortlisted in the Times Higher Education Leadership and Management Awards in the "outstanding employer engagement initiative" category.

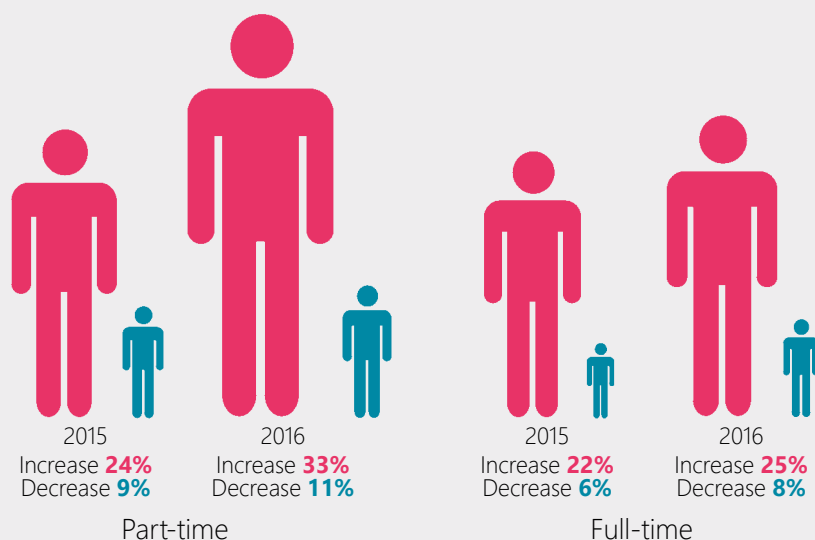
Do you employ staff?



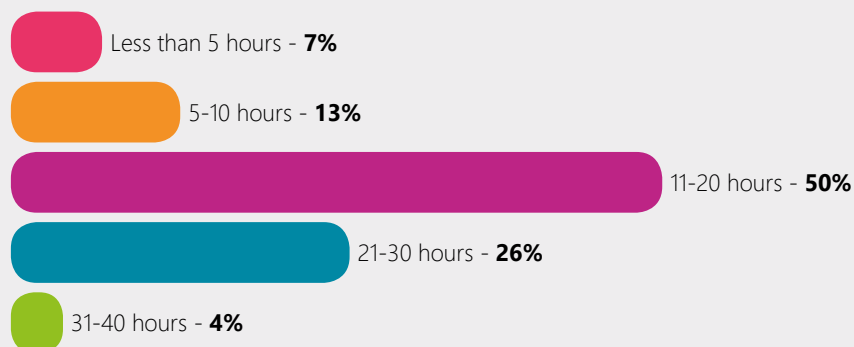
**40%**

of those who  
employ staff  
use zero hour  
contracts

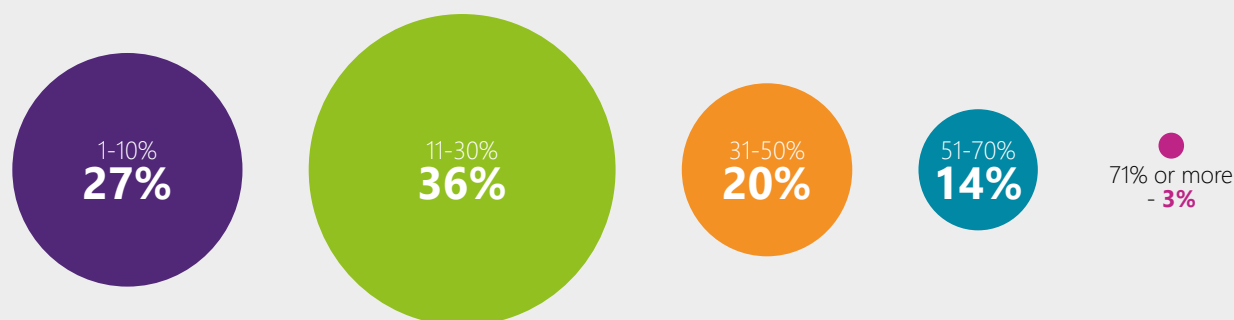
How did your full-time/part-time staff numbers change?



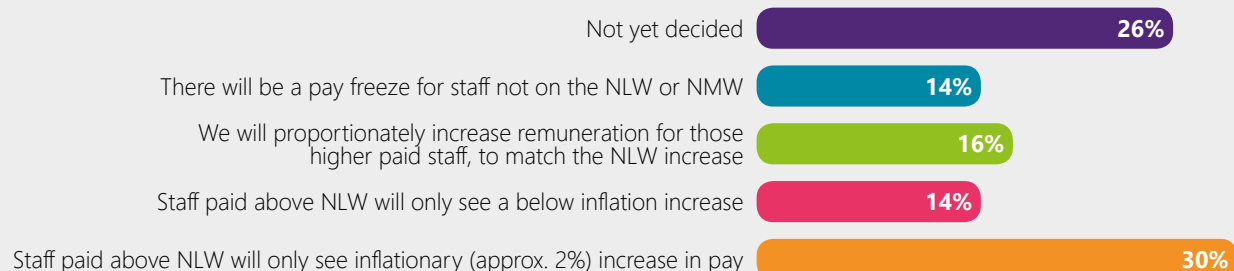
How many hours on average do staff on zero hour contracts work per week?



What percentage of your staff are aged 18-24?



With the introduction of the National Living Wage (NLW) and with the National Minimum Wage (NMW) increasing too, how will this affect your wage costs?





## THE LAST WORD

Our 2017 tourism survey was again well supported and I would like to thank all those who have helped promote it and participate in it and I hope you have enjoyed reading it.

Without your support and input we would not be able to put this together.

The data is collected in January and February and ties together a review of the 2016 trading year while also looking ahead to the 2017 year. It is this collective data that speaks so loudly as it comes from those who matter most – the business owners who invest so heavily to make this region the tourism and leisure destination it is.

We face an interesting future and I trust the information presented is balanced and takes in equal measure the confidence and elements of scepticism for the future and that we have touched on some complex aspects that will affect all of us.

As always, feedback is welcome on what you would like to see in the future publications and areas that may interest you or require more attention.

We are again grateful for the support in the survey of Visit Norfolk, Visit Suffolk, Visit Essex and Visit East Anglia, and on a more local level to all the local destination marketing or management organisations (the number of which I am pleased to report is growing) for their support too.

We have again been supported in the production of this report by our commercial partners so I would also like to thank Adnams, Camplings Linen Services, Hugh J Boswell Financial Services and Howes Percival.



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