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Tourism South East

Business Confidence Survey

January – June 2006

INVESTOR IN PEOPLE

CONTENT

Executive Summary

The following report presents the findings from the 11th tourism business confidence survey conducted by Tourism South East, covering the period from January to June 2006.

A total of 417 completed questionnaires were received. 38% of responding businesses were serviced accommodation providers, 26% were non-serviced accommodation providers and a further 30% were visitor attractions. The remainder were retail, leisure, food and drink, travel and transport and other tourism service providers.

A mixed first six months of the year…

43% of businesses reported their level of performance to be better overall over the first six months of 2006 compared with the same period in 2005. 25% reported the same level of performance and a further 32% reported worse overall performance.

Results suggest a mixed performance across the sub regions for the first six months of 2006 compared with 2005, with better performance in the Berks, Bucks & Oxon (BBO) and Hampshire sub regions, but worse overall performance in Surrey & West Sussex sub regions. Kent, IOW, East Sussex and Brighton businesses were more likely to report a mixed performance over the first half of this year.

Businesses in rural and coastal locations reported a mixed performance over the first six months of 2006. Urban businesses were more likely to report better overall performance over this period.

Hotels and guest houses reported a more positive performance for the first six months of 2006 than other sectors. Caravan and camping and 'other' businesses were more likely to report worse overall performance, whereas self catering, visitor attraction and B&B businesses were more likely to report a mixed performance.

Mixed optimism for the remainder of the year…

49% of businesses expect a better overall performance for the remainder of this year compared with 2005. 24% expect their business performance to be the same as 2005 levels. However, 27% expect their performance to be worse overall in 2006 compared with 2005.

As with last quarter, businesses in the BBO and East Sussex & Brighton sub regions were more optimistic than other sub regions about business performance in 2006. Surrey & West Sussex businesses were the least optimistic this quarter. Hampshire, IOW, and Kent businesses reported a more mixed optimism for the remainder of the year.

Both coastal and urban businesses were more likely to expect better performance in 2006. Rural businesses were more likely to expect a mixed performance overall for 2006.

Hotels, guest houses and visitor attractions were more upbeat about the year ahead. B&B, self catering and caravan and camping businesses were more likely to expect the same level of business as last year.

Concerns about the UK economic climate fading…

In previous quarters, the current UK economic climate was a key concern for most businesses, however this concern appears to be diminishing compared with the same time last year.

The majority of business operators reported that the weather had the most significant impact on business performance over the first half of this year.

More businesses were concerned about competition from overseas holidays and low cost airlines this quarter than last quarter.

Tourism South East Business Confidence Survey

1. Introduction

The following report presents the findings from the 11th tourism business confidence survey conducted by Tourism South East, covering the period from January to June 2006. Background to the survey methodology is given in section 5 and the sample profile for this quarter is detailed in section 6. Despite a recruitment exercise earlier this year, the sample remains at approximately 400 participants for this quarter (a total of 417 completed questionnaires were received).

At the time of writing security alerts at UK airports (following the attempted attack on flights to the USA on 10th August 2006) were heading the headlines, causing immediate disruption to travel to and from the UK. Although it is too early to say whether there will be any long term economic impact as a result of these alerts; the main disruption in the short term has been to travel plans and extra security measures lengthening check in times at UK airports. It is hoped that the inbound tourism market will prove to be as resilient as it was following the London bombings last year, although the biggest concern will be the reaction of the American market. Next quarter's business confidence survey will include an analysis of the impact of these security alerts on South East tourism businesses.

2. Overall business performance

2.1 Performance up to end of June 2006

Figure 1 Business performance since start of 2006 (compared with the same period in 2005)

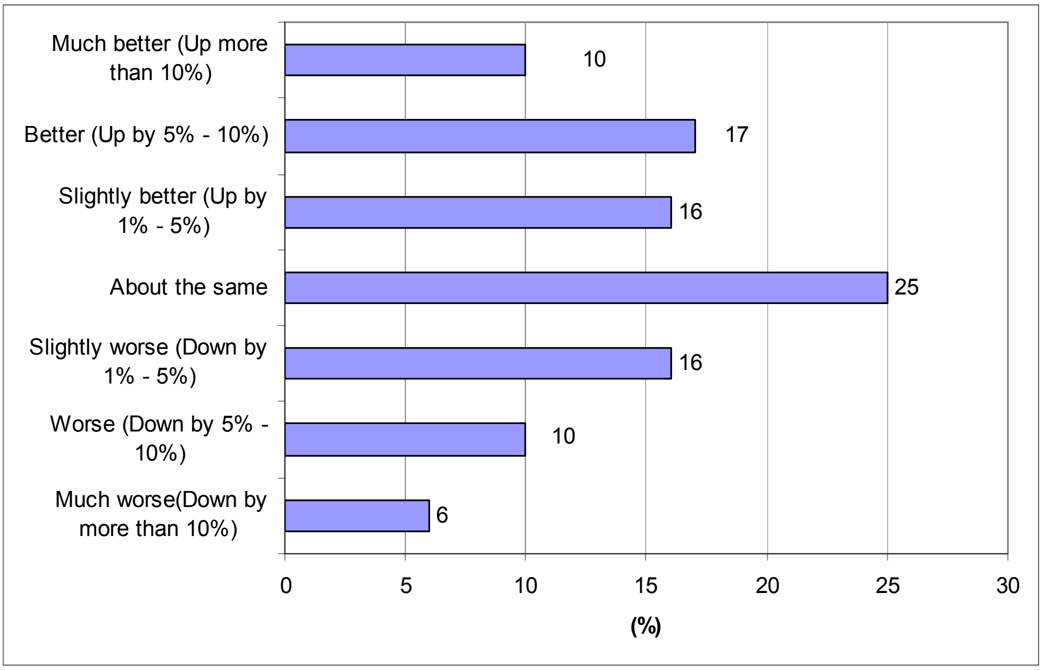
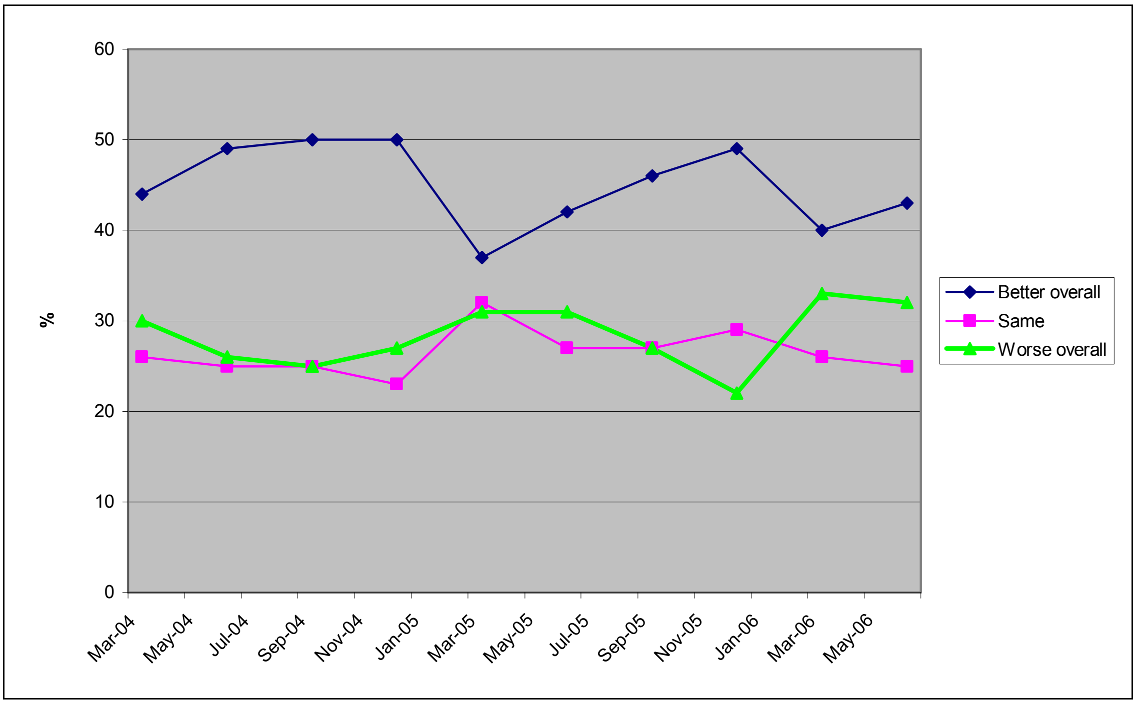


Figure 1 above suggests a mixed first six months for the year so far for tourism businesses in 2006 compared with the same period in 2005. 43% reported their level of performance to be better overall compared with last year (up 3% points on last quarter). A quarter reported their business performance to be the same as 2005 over this period, and a further 32% reported worse overall performance (down 1% point last quarter).

2.1.1 Trends in business performance (March 2004 – June 2006)

The proportion of businesses reporting better overall performance (compared with the same period in the previous year) fell over the first quarter of the year but saw a slight improvement over the second quarter. Although there was a sharp increase (up 11% points) in the proportion of businesses reporting worse overall performance in March this year, this seems to have levelled off slightly but still remains at its highest since March 2004.

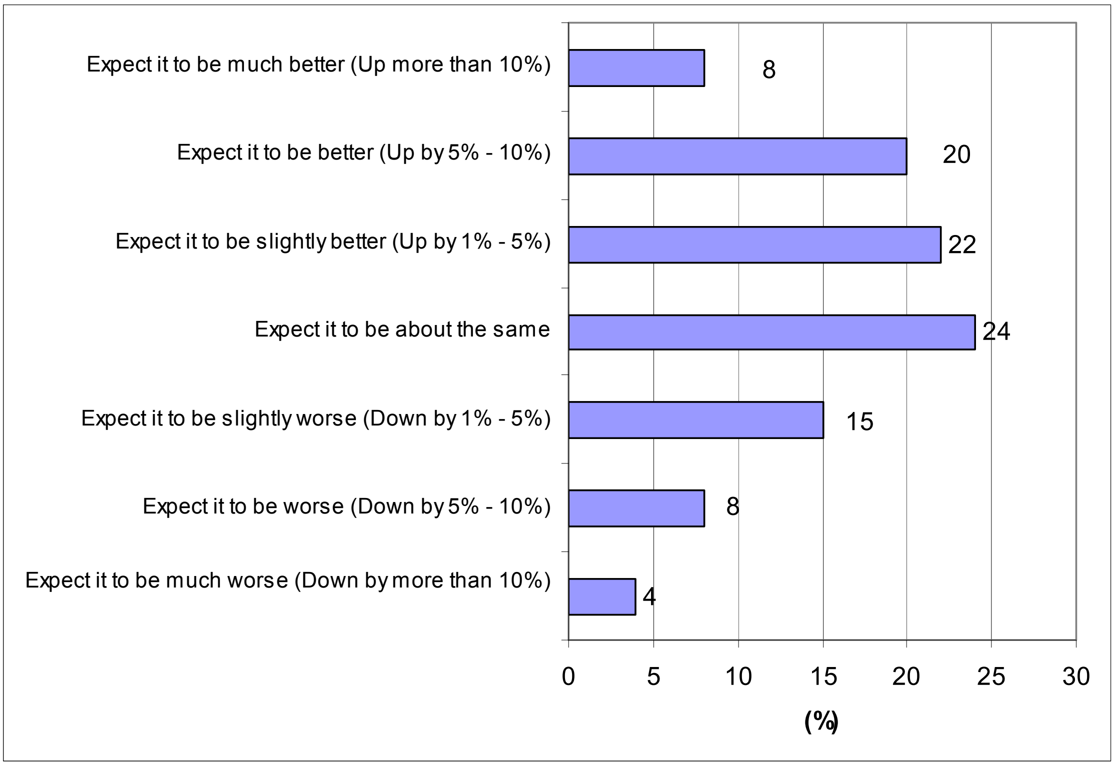
Figure 2 Business performance compared with the same period last year



2.2 Expectations for the remainder of 2006

Businesses were asked to indicate their expectations for 2006 compared with 2005. Just under half (49%) of businesses expect their performance for the remainder of the year to be better overall compared with last year. However, this was 1% point lower than that reported last quarter. Just under a quarter expect their business performance to be the same as 2005 levels (down 12% points from last quarter) and a further 27% expect their business performance to be worse overall (up 13% points from last quarter).

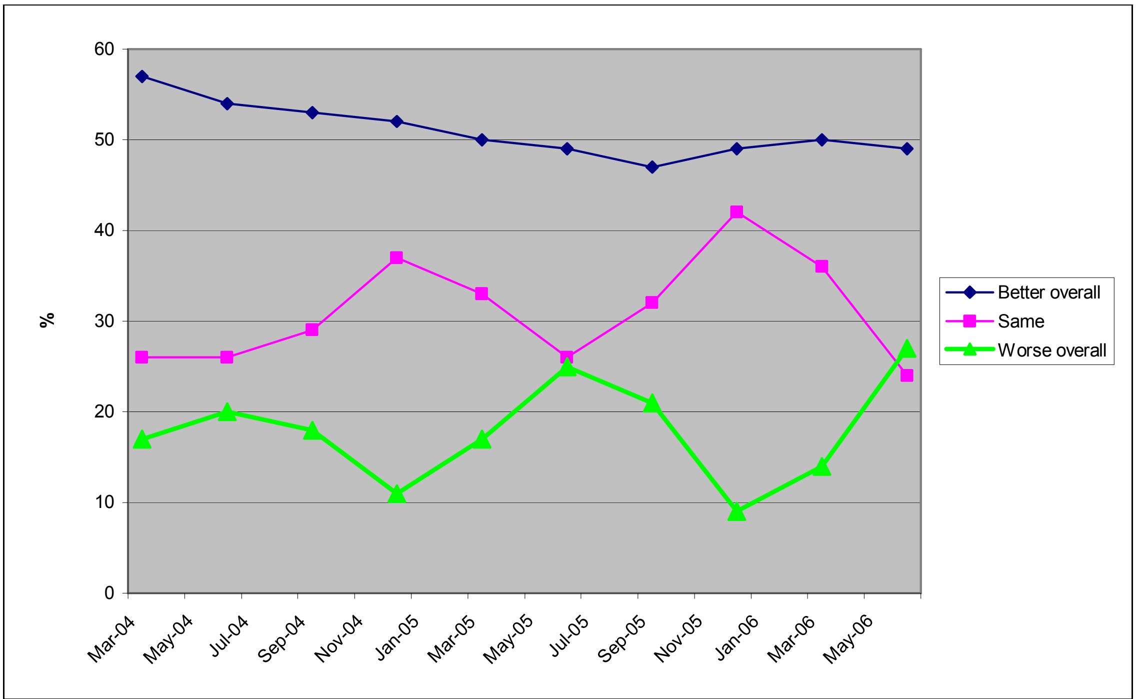
Figure 3 Business expectations for 2006 (compared with 2005)



2.2.1 Trends in business confidence (March 2004 – June 2006)

Business confidence has weakened since March 2004 (Figure 4 below), but picked up at the end of 2005 and the start of 2006. However, confidence has fallen very slightly in the last quarter (49% in June 2006 compared with 50% in March 2006). The proportion expecting worse overall performance for the year ahead (compared with the same period in the previous year) was at its lowest level (and most positive) in December 2005 when only 9% expected 2006 to bring a worse overall performance. This proportion increased to 14% at the start of 2006 and has continued to rise since then to 27% of all businesses expecting worse overall performance for the year ahead. Although businesses are reasonably upbeat about the year ahead, overall confidence in June 2006 was at its weakest since June 2005.

Figure 4 Tends in business confidence compared with same period last year



2.3 Key business concerns

The majority of business operators reported that the weather had the most significant impact on business performance over the first six months of 2006 (colder weather over the first quarter of the year followed by a particularly wet May and a heat wave in June). Both the caravan and camping and visitor attraction sectors were more likely to report that the weather had impacted on performance over the first half of this year (70% and 68% respectively), whereas for hotels, guesthouses, B&Bs and self catering businesses the weather had less of an impact. More businesses this quarter were concerned about competition from overseas holidays (31% this quarter compared with 20% last quarter) and competition from low cost airlines (19% this quarter compared with 14% last quarter). In previous quarters, the current UK economic climate was a key concern for most businesses, however this concern appears to be diminishing compared with the same time last year (29% June 2006 compared with 40% June 2005). The cost of running a business and cost of living remain a constant concern. Security fears were not a major concern over the first six months of 2006 (only 10% of businesses mentioned this), and the threat from avian flu has diminished somewhat.

Table 1 Key business concerns

	Count	%
Weather	193	46
Competition from overseas holidays	128	31
UK economic climate	120	29
High UK retail prices	97	23
Strength of the pound/exchange rates	93	22
Local competition	88	21
Lack of promotion	87	21
Competition from low-cost airlines	79	19
Over regulation	76	18
Poor transport network	65	15
Other	49	12
Competition from other parts of the UK	48	11
General security fears	43	10
No real concerns	27	6
Threat of avian flu	20	5

Businesses were asked about factors (both positive and negative) that had affected performance over the April – June period. For those who had reported better overall performance, the late Easter this year and the good weather over this period and in June were felt to have boosted business over the second quarter of 2006. In particular, businesses mentioned the hotter June weather encouraging more visits to the region (both day and other night).

A number of businesses remarked on recovering consumer confidence and an overall improvement to the current UK economic climate boosting visitor levels, as well as increased and better marketing and promotion, improved Internet presence and online booking facilities. Businesses also suggested that events such as the IOW festival, Volvo Yacht Race, Farnborough Air Show and other local events held around the region helped improve performance over the second quarter. Two businesses commented that they were continuing to enjoy the legacy of interest in the region generated by the Trafalgar 200 events. Improvements to facilities and upgrading accommodation were felt to have brought more business too. Several operators mentioned that competitive pricing (especially over weekends to boost occupancy levels) had led to better overall performance. Businesses also commented on an increase in business tourism generally, especially long stay business bookings from contractors working in the area improving occupancy rates. Word of mouth recommendations, repeat business and reputation were all felt to have helped improve business performance too.

However, the weather and the world cup were mentioned as key contributing factors by those businesses reporting poorer performance over the first six months of 2006. Although some businesses commented that the heat wave over June had not had a detrimental effect on business, for some operators (particularly indoor attractions), the hot weather was felt to have driven visitors to beaches and the countryside rather than indoor attractions. Many businesses also commented that the cold spring weather which had 'delayed the start to the season', together with the wet weather over May and poor weather generally, dampened performance generally over the first half of 2006. Coupled with this, the timing of the Easter, rescheduling of school holidays in some parts of the country and the closeness of the Easter break to the bank holiday weekends were thought to have concentrated visits over a shorter period, rather than over an extended period with more opportunities for short breaks or days out.

Whilst some businesses were optimistic about an upturn in the economy and growing consumer confidence, for a large proportion, the uncertainty surrounding the economy was felt to be suppressing business performance. The cost of running a businesses whilst keeping prices competitive and expectations amongst consumers for discounts were mentioned along with rising fuel, utility bills, insurance costs and business rates. Increased competition from new businesses and existing businesses was also mentioned as a factor contributing towards worse overall performance. Unfavourable exchange rates and the cost of travel to the UK were felt to be deterring overseas visitors. On a more localised level, mention was made of road works over the period (in particular Winchester, Rye, A34 Oxford Ring Road, A259 & A21) affecting business performance. Last minute cancellations and 'no-shows' were mentioned as well as a trend towards single night breaks or day conferences rather than the more profitable two or three night stays or conferences.

3 Sector insights

The results by sub region, location and business type need to be viewed with a consideration of the sample sizes (sample size is given in brackets).

3.1 Sub regions

Table 2a below breaks down business performance for the first six months of 2006 compared with 2005, into sub regions.

3.1.1 Performance up to end of June 2006

Results suggest a mixed performance across the sub regions for the first six months of 2006 compared with 2005, with better performance in Berkshire, Buckinghamshire & Oxfordshire (BBO) and Hampshire, but worse overall performance in the Surrey and West Sussex sub regions. Kent businesses were more likely to report a mixed performance over the first half of the year with 38% of businesses reporting better overall performance and a further 34% of businesses reporting worse overall performance. Likewise, businesses in the IOW and East Sussex & Brighton sub regions reported a more mixed performance.

Table 2a Business performance since start of 2006, compared with same period in 2005

	Berks, Bucks, Oxon	Hampshire	I.O.W	Surrey	West Sussex	East Sussex and Brighton	Kent
Base	*(50)*	*(121)*	*(54)*	*(16)*	*(40)*	*(47)*	*(81)*
	%	%	%	%	%	%	%
Much better(Up more than 10%)	24	9	7	6	2	4	11
Better(Up by 5% - 10%)	20	21	20	6	7	19	15
Slightly better(Up by 1% - 5%)	10	21	15	19	10	26	12
Total % 'Up'	***54***	***50***	***42***	***31***	***21***	***49***	***38***
About the same	24	23	30	25	32	13	27
Slightly worse (Down by 1% - 5%)	16	9	13	19	22	21	20
Worse (Down by 5% - 10%)	6	9	7	19	15	8	12
Much worse (Down by more than 10%)	0	8	7	6	10	8	2
Total % 'Down'	***22***	***26***	***28***	***44***	***47***	***38***	***34***

Note: Respondents may have businesses present in more than one sub region.

The proportion of Hampshire and IOW businesses reporting better overall performance did improve this quarter, compared with the snapshot taken 12 months ago (June 2005). 50% of Hampshire businesses reported better overall performance this quarter compared with 44% twelve months ago, and 42% of IOW businesses reported better overall performance compared with 31% twelve months ago.

Fewer BBO and Kent businesses reported better overall performance this quarter compared with 12 months ago (for BBO 54% reported better overall performance this quarter compared with 60% twelve months ago); and for Kent, marginally fewer businesses reported better overall performance this quarter (38%) compared with 12 months ago (39%). For East Sussex & Brighton businesses the same proportion of businesses reported better overall performance this quarter (49%) compared with 12 months ago (49%), but slightly more businesses reported worse overall performance (38% this quarter compared with 27% twelve months ago).

Surrey and West Sussex results have been separated to reflect the new sub regional arrangement, and therefore comparisons with the previous year's results are not possible.

3.1.2 Expectations for 2006

Table 2b breaks down expectations for 2006 by sub region. Overall, South East businesses' expectations for 2006 remain reasonably favourable.

As with last quarter, businesses in the BBO and East Sussex & Brighton sub regions were more optimistic than other sub regions about business performance in 2006. 65% and 64% of businesses in the BBO and East Sussex & Brighton sub regions respectively expect business to be up on 2005 levels. Despite being more optimistic last quarter, both Surrey and West Sussex sub regions were the least optimistic this quarter, with 44% and 35% respectively expecting business to be worse overall during 2006 compared with 2005 levels. Although Hampshire, IOW and Kent businesses were more cautious about the year ahead last quarter, optimism amongst these businesses seems to have waned slightly with fewer expecting the same level of business this quarter compared with last quarter and slightly more expecting worse overall performance.

Table 2b Expectations for 2006, compared with 2005

	Berks, Bucks, Oxon	Hampshire	I.O.W	Surrey	West Sussex	East Sussex and Brighton	Kent
Base	*(51)*	*(121)*	*(55)*	*(16)*	*(40)*	*(47)*	*(81)*
	%	%	%	%	%	%	%
Up more than 10%)	20	3	9	6	0	9	9
Up by 5% - 10%	25	23	18	6	18	25	12
Up by 1% - 5%	20	21	20	19	15	30	25
Total % 'Up'	***65***	***48***	***47***	***31***	***33***	***64***	***46***
Expect it to be about the same	21	23	25	25	32	17	27
Down by 1% - 5%	8	13	13	37	25	9	17
Down by 5% - 10%	4	11	7	6	8	4	9
Down by more than 10%	2	5	7	0	2	6	1
Total % 'Down'	***14***	***29***	***27***	***44***	***35***	***19***	***27***

Note: Respondents may have businesses present in more than one sub region

BBO, IOW and Kent businesses were slightly more optimistic than other sub regions about business performance in 2006, compared with 12 months ago, when 64% of BBO, 45% of IOW and 45% of Kent businesses expected better overall performance for the year ahead. East Sussex & Brighton businesses were significantly more upbeat about the year ahead compared with 12 months ago, when 53% of businesses expected better overall performance for the year ahead. Businesses in Hampshire, however, were less optimistic in June 2006 than they were in June 2005 (29% expect worse overall performance for 2006 compared with 20% 12 months ago).

3.2 Location

3.2.1 Performance up to end of June 2006

Businesses in rural and coastal locations reported a mixed performance over the first six months of 2006 compared with the same period in 2005, with 42% of both rural and coastal businesses reporting better overall performance and a further 35% of rural businesses and 34% of coastal businesses reporting worse overall performance. Urban businesses were more likely to report better performance over this period (49%) and were less likely to report worse overall performance (21%).

Table 3a Business performance since start of 2006 compared with 2005

	Rural	Coastal	Urban
Base	*(217)*	*(105)*	*(87)*
	%	%	%
Much better (Up more than 10%)	11	9	8
Better (Up by 5% - 10%)	15	18	22
Slightly better(Up by 1% - 5%)	16	15	19
Total % 'Up'	***42***	***42***	***49***
About the same	23	24	30
Slightly worse (Down by 1% - 5%)	16	19	10
Worse (Down by 5% - 10%)	13	8	4
Much worse (Down by more than 10%)	5	8	6
Total % 'Down'	***35***	***34***	***21***

Note: Respondents may choose to define their location by more than one type

3.2.1 Expectations for 2006

Both coastal (50%) and urban (57%) businesses were more likely to expect better performance in 2006. Rural businesses were more likely to expect a more mixed performance in 2006, with 45% expecting better overall performance and 30% expecting business to be worse overall.

Table 3b Expectations for 2006 compared with 2005

	Rural	Coastal	Urban
Base	*(218)*	*(106)*	*(87)*
	%	%	%
Much better(Up more than 10%)	7	8	7
Better (Up by 5% - 10%)	18	18	25
Slightly better(Up by 1% - 5%)	20	23	25
Total % 'Up'	***45***	***50***	***57***
About the same	25	22	26
Slightly worse (Down by 1% - 5%)	17	17	6
Worse (Down by 5% - 10%)	10	5	7
Much worse (Down by more than 10%)	3	7	3
Total % 'Down'	***30***	***28***	***16***

Note: Respondents may choose to define their location by more than one type

3.3 Type of business

3.3.1 Performance up to end of June 2006

Hotels and guest houses reported a more positive performance for the first six months of 2006 than other sectors. 60% of hotel and 50% of guest house businesses reported better overall performance over the first half of the year compared with 2005. Approximately two-fifths of caravan and camping and 'other' businesses and over a third of visitor attractions reported a worse overall performance. A significant proportion of B&B and self catering businesses also reported worse overall performance over the first six months of this year, with 32% of B&Bs and 31% of self catering businesses confirming that business was down overall.

Table 4a Business performance since start of 2006 compared with same period in 2005

	Hotels	Guest Houses	B&B	Self Catering	Caravan and camping	Visitor attraction	Other
	%	%	%	%	%	%	%
Base	*(40)*	*(24)*	*(90)*	*(80)*	*(27)*	*(123)*	*(25)*
Up more than 10%	10	21	12	10	0	7	12
Up by 5% - 10%	15	17	19	16	18	18	16
Up by 1% - 5%	35	13	11	13	15	20	4
Total % 'Up'	***60***	***50***	***42***	***39***	***33***	***45***	***32***
Expect it to be about the same	22	33	25	30	26	19	28
Down by 1% - 5%	5	8	19	15	26	16	16
Down by 5% - 10%	5	0	9	10	11	12	20
Down by more than 10%	8	8	4	6	4	7	4
Total % 'Down'	***18***	***17***	***32***	***31***	***41***	***36***	***40***

However, hotel, guest house, B&B and self catering businesses all saw a better overall performance compared with the snapshot taken 12 months ago (June 2005), when 43% of hotels, 39% of guest houses, 38% of B&Bs and 33% of self catering reported better overall performance. However, for caravan and camping and visitor attraction businesses, the picture was less positive than the snapshot taken 12 months ago when 57% of caravan and camping and 52% of visitor attraction businesses reported better overall performance.

3.3.2 Expectations for 2006

Hotel, guest house and visitor attraction businesses were more upbeat about the year ahead, with 70%, 54% and 57% respectively expecting better overall performance this year compared with last year. Businesses in the 'other' category such as transport, leisure, retail and food were less optimistic about the year ahead. B&B, self catering and caravan and camping businesses were more likely to expect the same level of business this year as last year.

Both hotel and guest house businesses were more optimistic than they were 12 months ago (June 2005) when 52% of hotels and 47% of guest house businesses expected better overall performance for the year ahead. Optimism amongst B&Bs and visitor attractions was the same as the snapshot taken 12 months ago, however self catering and caravan and camping operators were less optimistic than 12 months ago when 44% of self catering and 52% of caravan and camping businesses expected better overall performance for the year ahead.

Table 4b Expectations for 2006 compared with 2005

	Hotels	Guest Houses	B&B	Self Catering	Caravan and Camping	Visitor Attraction	Other
Base	*(40)*	*(24)*	*(92)*	*(80)*	*(27)*	*(123)*	*(25)*
	%	%	%	%	%	%	%
Up more than 10%	7	12	7	6	0	10	8
Up by 5% - 10%	28	25	18	16	22	20	12
Up by 1% - 5%	35	17	16	18	22	27	16
Total % 'Up'	***70***	***54***	***41***	***40***	***44***	***57***	***36***
Expect it to be about the same	18	25	32	32	33	13	28
Down by 1% - 5%	2	13	15	15	15	16	28
Down by 5% - 10%	2	0	11	8	4	11	0
Down by more than 10%	8	8	1	5	4	2	8
Total % 'Down'	***12***	***21***	***27***	***28***	***22***	***30***	***36***

4 Impact of water restrictions in the South East

4.1 Overall impact of water restrictions

Water shortages were a major issue for the South East over the first six months of 2006. In this quarter's survey businesses were asked whether water restrictions, that had either already been put in place or the possibility of them being put in place by their local water authority, had had an impact on the running of their business or the behaviour of customers. The vast majority of businesses (79%) reported that they had not been affected to date and a further 12% had noticed a change that they could attribute to water restrictions. 10% were unsure.

Table 5 Impact of water restrictions on the running of businesses

	Count	%
Yes	47	12
No	321	79
Unsure	39	10
Total	407	100

Where water restrictions had impacted on the running of businesses, the main areas affected were the visual look of gardens; limited floral displays or hanging baskets, turning off water features etc. Gardens and garden centres offering plants for sale saw a dip in plant sales and commented on less interest in gardening generally. One particular business (steam railway) commented that any water restrictions or complete ban would affect their ability to run steam trains, and the alternative, diesel engines would be of less interest to visitors.

Customer awareness of water restrictions/shortages was felt to be mixed, with operators commenting that 'visitors do not seem to respect the current water shortage' and still expect fresh bed linen and towels each day, whilst other operators commented that guests had asked how they were conserving or recycling water.

Those businesses conserving or recycling water were doing so by not watering gardens, planting 'drought resistant' plants, installing water butts, reducing the number of daily linen and towel changes or accumulating laundry to avoid 'half load' washes and advising guests on how to be more conservative with water (including notices in rooms).

4.2 Impact of water restrictions (sub region)

A higher proportion of businesses in the BBO, Kent, East Sussex & Brighton and West Sussex sub regions than for the whole of the South East reported that they had noticed an impact that could be attributed to water restrictions. Surrey, IOW and Hampshire businesses were the least affected.

Table 6 Impact of water restrictions (sub region)

	Berks, Bucks, Oxon	Hampshire	I.O.W	Surrey	West Sussex	East Sussex and Brighton	Kent
Base	*(51)*	*(119)*	*(53)*	*(16)*	*(40)*	*(48)*	*(80)*
	%	%	%	%	%	%	%
Yes	22	2	8	0	15	17	19
No	72	90	85	88	72	69	70
Unsure	6	8	7	112	13	14	11

4.3 Impact of water restrictions (location)

Rural businesses were more affected by water restrictions than those in urban or coastal locations.

Table 7 Impact of water restrictions (location)

	Rural	Coastal	Urban
Base	*(217)*	*(104)*	*(86)*
	%	%	%
Yes	14	9	8
No	76	80	85
Unsure	10	12	7

4.4 Impact of water restrictions (sector)

A small proportion of businesses in each sector claimed to have noticed a change in business that they could attribute to water restrictions. However, of all the sectors, hotels operators were more likely to report an impact and guest house operators were less likely to.

Table 8 Impact of water restrictions (sector)

	Hotel	Guest house	B&B	Self catering	Caravan & camping	Attraction	Other
Base	*(39)*	*(23)*	*(92)*	*(78)*	*(27)*	*(123)*	*(25)*
	%	%	%	%	%	%	%
Yes	15	9	12	11	11	11	12
No	69	78	80	81	70	82	76
Unsure	15	13	8	8	19	7	12

5 Survey background

5.1 Methodology

Tourism businesses in the South East region were asked to complete a simple two page questionnaire and return by either fax or post. Alternatively, respondents had the option of completing the questionnaire on-line. 57% were returned by post, 35% were returned by fax and the remaining 8% were completed online. The sample size has remained constant at approximately 400 participants (despite a recruitment exercise over March this year and the introduction of a new prize draw).

5.2 Dates for next survey

The next survey covering the first nine months of 2006 and expectations for the remainder of the year will be mailed on 2nd October 2006.

6 Profile of sample

For the second quarter of 2006, a total of 417 questionnaires were returned by the analysis deadline. As the survey is self selecting rather than random, it is not possible to calculate margins of error associated with the sample. However, there remains a substantial core of survey participants (over 200) who currently provide data each quarter, and therefore the trends identified by the survey are believed to accurately reflect overall trends in business performance and expectations.

Care should be taken when interpreting the results where sample size is small.

6.1 Sub-region

Indicative analysis at a sub regional level has been provided within this report. Care should be taken when interpreting the results for the Surrey, West Sussex, East Sussex & Brighton and BBO sub regions due to small sample sizes.

Table 9 Sub region

	Count	%
Berks, Bucks, Oxon	51	12
Hampshire	121	29
IOW	56	13
Surrey	16	4
West Sussex	40	10
East Sussex and Brighton	49	12
Kent	83	20
Total	416	100

Note: Respondents may have businesses present in more than one sub region

6.2 Type of location

53% of businesses were located in rural areas, 26% were in coastal areas and the remaining 21% were located in urban areas. Indicative analysis by location has been provided within this report.

Table 10 Location

	Count	%
Rural	220	53
Coastal	108	26
Urban	88	21
Total	416	100

Note: Respondents may define their location by more than one type

6.3 Type of business

Table 11 Business sector

	Count	%
Hotels (including motels, travel lodges, inns)	41	10
Guest houses	24	6
B&B including farm houses)	93	22
Self-catering (including flats, cottages, houses)	81	19
Holiday park	16	4
Caravan and camping	11	3
Visitor attraction	124	30
Leisure/sport centre	2	*
Retail	5	1
Food and drink	2	*
Travel and transport	1	*
Tourism services (I.e. tour operator, travel agent/guide)	5	1
Other	11	3
Total	416	100

* Less than 0.5%