

DMO Autumn Survey 2025



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As we embraced the shift into Autumn, we collaborated with Destination Management Organisations (DMOs) across East Anglia to gain insights from businesses and members into the current sentiment and challenges facing the tourism, leisure, and hospitality sector in the region.

Conducting a structured survey and comparing the results with data from the same period last year, we were able to assess sector performance and identify the impact of external factors on business operations.

The survey was deliberately timed to be completed prior to the Autumn budget 2025, to gain understanding of what matters to business and what would be on their wish list to tackle some of the problems being faced in the sector.

The overwhelming response was the feeling of uncertainty over the impact of potential legislative changes. Businesses

want clarity and certainty going forward. Specifically, you said tax cuts would help by giving small businesses room to breathe, and in turn more disposable income for leisure spend to bolster the sector. Additionally, seeking help for small businesses in the form of government support, access to grants and opportunities to upskill would be welcomed and much needed.

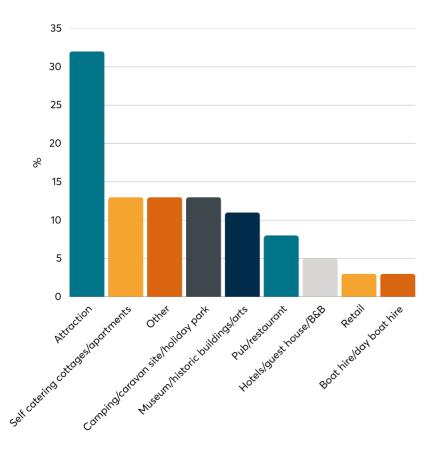
Whether these are implemented remains to be seen, but it is imperative that as a collective the sector continues to raise its voice and tackle the issues head on.

Together we are better.

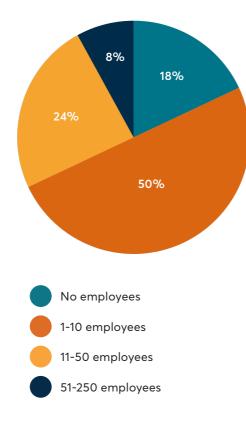
Joanna Burton Director, Larking Gowen

Respondents

The following is a cross section of the respondents who participated in the survey, providing results from a good representative population across the DMOs in East Anglia and beyond. Many respondents were part of more than 1 DMO participating in the survey.







Autumn period footfall

Changes to gate admission, tickets sales and bookings





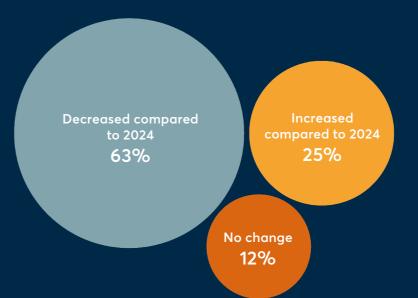
There was a notable shift in people passing through or present within the businesses, when compared to both the Summer and the previous Autumn figures, where we had seen some positivity. More than half noted they had seen a decrease in visitor numbers, stating that the decreases seen were up to 25%. Limited cash available for visitors was deemed to be the most likely reason, less advertising and reduced opening hours for some.

Meanwhile, a third of respondents cited an increase, with this varying anywhere between 5% to 50% increase.

This was deemed to be down to increased marketing using social media and interest in relatively new businesses.

There was stability shown in the number of gate admissions for paid entry, with no strong upward or downward trend, with potential growth in some areas being offset by others. This shows that efforts of marketing, campaigns and events are working for the parts that can be controlled, but are being balanced by factors outside of our control, being the weather, economic pressure and so on.

Changes to occupancy rates

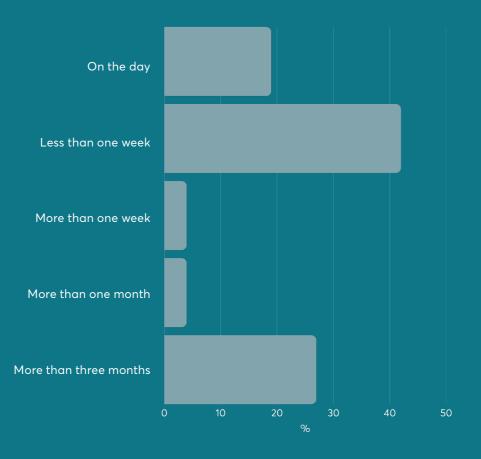


Occupancy rates have shown a decline compared to the summer, which previously was an even split. Two-thirds of respondents said they had seen a decreased demand despite no change to the hours they were open for business. The lower level of demand points to potential reduced interest, or affordability concerns, to already price sensitive consumers.

Advance bookings

The overall data showed the trend of short notice bookings continuing, thus requiring a dynamic and flexible staffing mix. In the Attraction sector 58% of bookings were made within less than 7 days of the visit, with a further 33% booking on the day.

Pubs and restaurants, and accommodation followed similar patterns and were the most likely to see bookings made in advance, for bigger events or larger parties, but still a good proportion of their business was generated from bookings taken on the day or the night before.



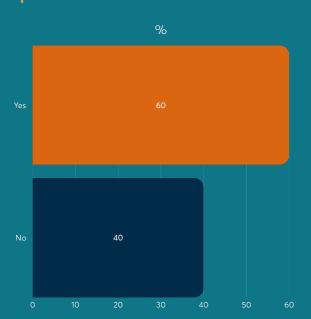
Changes to opening hours



83% have not changed their bookable hours.

The majority of businesses continued with no change to their venue opening hours, with mainly attraction events closing for certain periods following the summer months.

Special offers



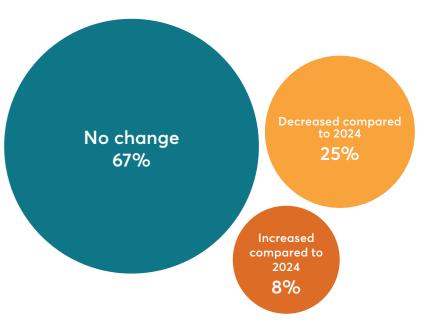
The pattern of special offers remains on a similar basis with 60% of respondents making promotional offerings. Of those that used this as a tool to attract customers, this seems successful in terms of visitor number and bookings, although the question remains unanswered as to what extent did this impact turnover and the bottom line.

Of those that promoted special offers 33% said their footfall had increased, with a 44% decrease, compared with those that offered no additional incentives seeing a 29% increase in footfall, but a larger decrease at 57%.

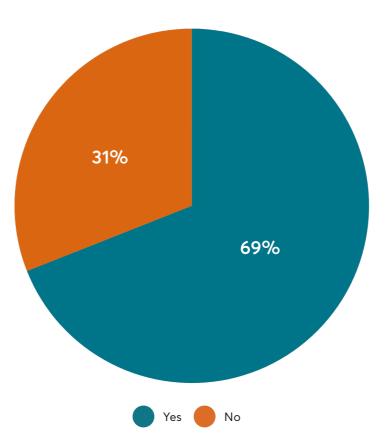
Staffing

The fact that two-thirds of businesses reported static staffing levels suggests overall stability in workforce planning, despite ongoing economic and operational pressures.

However, the quarter of businesses that reduced headcount indicates a cautious approach, which is possibly driven by cost control measures or seasonal demand fluctuations, as we come to the end of the season for some. This mixed picture reflects the need for adaptability in sector and the requirements needed to be able to adjust resources in a timely way to align with performance and visitor trends.



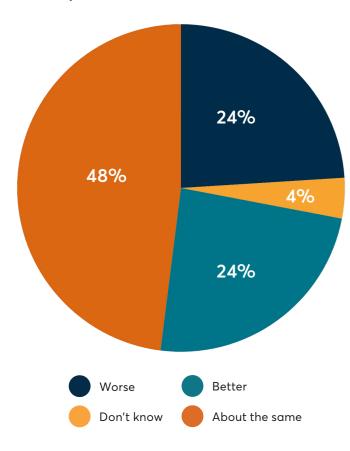
Repeat visitors



More people it seemed are using resources which allow them to track repeat visitor behaviour, enabling them to build a picture of consumer habits over time. 69% said they were doing this, up from just 39%, when we last asked and gaining return rates between 15%-40%.



Overall performance for 2025



The headline figure here shows continued resilience in the sector with 72% of businesses maintained or improved performance compared to last year, which given the current economic climate, is no mean feat.

The underlying reality of this is more nuanced. Half of these businesses experienced no growth, signalling that stability does not necessarily equate to progress.

The equal split between those reporting gains and those facing declines (24% each) paints a mixed picture, successes in some areas are counterbalanced by persistent challenges elsewhere. For the group who saw improvement in business performance, each one stated they had improved their marketing campaigns and special offers, leading to increased footfall and overall business performance. Further understanding of these drivers could offer valuable insights.

Summary

Those who responded said there continues to be need for financial stability and certainty within the sector.

Your key wishes include reducing business costs through lower taxes, VAT reductions, and the removal or reversal of recent increases in National Insurance Contributions (NIC) and National Living Wage (NLW) including lower corporation and employment taxes, rural rate relief.

There is strong will for measures that enhance disposable income for consumers, enabling greater spending on leisure activities and short breaks.

Businesses seek allowances for holiday lets, while distinguishing commercial operators from second-home owners. Additional requests include revisiting mortgage allowances for furnished holiday lets and addressing previous changes to capital expenditure treatment.

Charities and arts organisations call for increased grant funding, tax relief, and energy bill discounts for public buildings. Small businesses and town center traders require further assistance to manage extra costs related to pensions and NI, alongside reductions in business rates and council tax. Overall, the focus is on creating a supportive fiscal environment that encourages growth, sustains tourism, and strengthens community-based enterprises. Lets see whether the Autumn 2025 budget offers some reprieve...







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