



Tourism, Leisure & Hospitality Business Survey 2023

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Memory Makers

Firstly, welcome to our 2023 Tourism Business Survey brochure. We last published a survey in 2019 which, although four years ago, still holds interesting and relevant insights.



The views of the businesses surveyed are shared in this brochure. For me, the key message for 2023 is that we must make sure our teams help create great memories."

Survey overview	4
Sustainability	6
Growth & investment	10
Marketing & brand	14
Consumer trends	18
Staffing	20
The last word	26

In February 2020, when our 2020 survey data capture was underway, participation levels were good, but things started to change and, as February 2020 unfolded and the stay-at-home messages began here in the UK, the optimism and feedback by the survey participants also changed. Genuine uncertainty and fear were creeping into the sector. Lockdown started and the future became very uncertain.

The year 2020 was momentous for several reasons. The UK exited the European Union, with Brexit day as it was called, on 31 January 2020, and entered a transition period. Then followed months of debate and extended deadlines leading up to the trade deal coming into force on 31 December 2020. This uncertainty was the backdrop to the big issue for our sector, which was Covid. There was never a truer rally call for our sector when it was said that the Tourism, Leisure and Hospitality sector was hit first, hit hardest and hit longest.

I was delighted to work alongside organisations, at the time, such as the Norfolk and Suffolk Tourist Attractions group, who, along with national organisations, were rallying for support. The survey we produced from that concluded that, for businesses to survive, they needed three things; flexible furlough (it was effectively all or nothing at the time the survey was undertaken); longer repayment periods of CBILs loans (there was a fear that cash flow would sink many businesses just as their recovery started); and a VAT rate reduction. It wasn't down solely to this survey, but all three were granted. As a result, many more businesses survived than would otherwise have done, particularly in those early stages.

Sadly though, some businesses were lost, and others today are still recovering from the impact and disruption caused by the pandemic.

Many businesses, though, benefited—some unexpectedly—from the boost

which arose due to the enforced staycations of 2020 and 2021. Of course, the weather was exceptionally kind in 2020 too.



During the pandemic, the wonders of our region, with its open spaces offering natural social distancing, was rediscovered, and innovations to help weather-proof outside spaces enabled the season to be extended."

Furlough helped flex staffing during our normally quieter periods, VAT reductions helped maintain turnover, while grants and business rate reductions helped the bottom line.

Covid is still with us, and we've learned to live with it. However, the discovery of the East of England as an outstanding destination, will be a legacy. Visitors came and made great memories against a backdrop of uncertainty. So how is this relevant today?

The key, as I see it, is for all parts of the sector to recognise our role in being creators of great memories. Those who operate and work in our Tourism, Leisure and Hospitality sector will face new challenges this year. Businesses, staff, and our visitors are facing new cost of living challenges. Inflation is running at high levels and, most certainly, wages aren't keeping pace and purses are being squeezed.

Will the visitors come? How will they spend? Families facing decisions on

how to spend their limited resources wisely, will do so if they can see that their reward will be the creation of great memories. We know that we can deliver that. However, making sure we're giving extraordinary value doesn't mean giving away things cheaply. It costs nothing for our teams to offer a warm and friendly welcome, for promotional material to shout 'fun!', to create enjoyment and great experiences, empowering every member of our teams to be 'directors of first impressions'.

Regardless of the economic environment, our businesses offer an eclectic mix of options for visitors to enjoy and, by making their experience fabulous, we can create long-lasting memories. Although their spend may not be as much as we'd like, we will create visitors who, once they've discovered us, will keep coming back.

Chris Scargill
Tourism, Leisure and Hospitality Partner, Larking Gowen

The annual Tourism, Leisure and Hospitality Business Survey is the largest independent survey of its kind in East Anglia.

The data, which is collected from businesses in Norfolk, Suffolk and Essex, helps to provide representative and accurate information about the sector; its views, trends and results across a range of issues, creating a useful benchmark and yardstick.

The survey is compiled by the Tourism, Leisure and Hospitality team at Larking Gowen.

For more information visit tourismsurveys.co.uk larking-gowen.co.uk



Survey overview

Clearly, the last three years have been challenging in many ways and, for many, 2022 was seen as potentially their year of getting back to normal. So, what did our survey discover?

Of the businesses surveyed, over half (53%) maintained marketing spend in 2022 around their pre-pandemic levels, while 32% spent more in 2022 than in 2019. Looking forward, 40% planned on investing more on marketing in 2023 than they had spent in 2022. The majority of businesses (75%) spend 5% or less of their turnover on marketing initiatives, while 3% spend over 10% on marketing. The marketing investment would appear to be paying off, with 21% of businesses suggesting that their turnover in 2023 would be substantially more than in 2019, while 12% also anticipated their profits would be substantially more than then too.

Looking forward, 41% of businesses anticipated turnover in 2023 being

greater than in 2022, but there is an expectation by many that profits will be challenged, with 45% anticipating a fall in profits in 2023, compared to 2022, while 28% anticipated profit levels being unchanged. Profits are a concern generally, as 37% of those surveyed were worried about the lack of profitability in the sector. Of the biggest worries, 59% of businesses are concerned about the overall UK national economic climate.

While the values above show positive aspects on turnover, 35% of businesses worry about the staycation ending, while 23% are concerned about the sustainability of the sector. A key ingredient in bringing visitors to our region is the work of the Destination

Marketing Organisations (DMOs). Some 64% of those surveyed are engaged with DMOs and 58% of businesses highlighted that the work of the DMOs brought business that benefited them. There are still detractors, with 16% not having an opinion on the work of the DMOs, while 8% felt that they did not benefit them; or didn't understand where their money was invested; nor felt the DMOs spoke "their language". Overall, though, the message looks positive.

There does seem to be some consensus and the survey put a challenge to central government, suggesting that our counties were not getting enough support (64%) with only 10% suggesting they were. There was

slightly more positivity regarding local government support, with 18% suggesting they were getting the help needed. Both these statistics are interesting at a time when only a few months previously the sector as a whole saw support running into billions of pounds. So maybe the reality is one of expectation, with other regions seemingly benefiting to a greater extent.

Our businesses had sought and obtained critical funding during the pandemic, with 46% of businesses benefiting from business rate reductions, and 67% had received local government grants. Some 61% had support funding their staffing costs via the furlough scheme, while

56% benefited from the VAT reduction. Therefore, while the overriding support, looked at generally, may be viewed negatively, the businesses felt that the Government had done enough (30%) during the pandemic or had delivered more than expected (54%). However, 16% felt that the Government could have done more.

Businesses are being hit by a number of factors currently. When the Living Wage for 2023 was originally announced as being £10.42 an hour, a rise of 9.7%, it was again expected to be an inflation busting rise for the lowest paid in our sector. We now know that it actually fell below inflation, but the level is still a challenge for the businesses surveyed. The survey indicates that some 13% of businesses were not planning pay rises in 2023 beyond those statutorily enforced, although 38% planned increases of between 4% and 8%; while 5% anticipated average wage rises for their teams of over 10%.

The impact of these changes would see 68% increasing their prices to accommodate wage changes, while 43% were taking the impact on the chin and accepting falling profits. Some of these impacts are potentially unsustainable and, ultimately, could lead to the risk of a business' decline, as the feedback shows investment in refurbishment and marketing is taking the hit, with 4% of businesses already considering that their business may have to close. One comment, on the combination of factors affecting the sector, sums it up as: "The minimum wage increase along with energy prices and less pound in our target market's pocket makes the squeeze very real".

Businesses were already reducing operating hours due to staff challenges (19%) and energy costs (20%), while 18% suggested they had reduced trading hours as a result of declining business levels. Another pressure point for businesses has been rising interest rates, although 43% of those surveyed said they did not have borrowings. One in five, however, suggested that the level of increase for them was currently affordable. Some 8% of businesses had locked into an affordable rate, however, 27% were concerned about further increases.

Gaining customer feedback is important to many businesses; 77% monitored online reviews, while 40% had their own internal methods for collecting feedback, and 37% said that their online software was their driver for this type of information. Only 11% suggested that they did not monitor feedback regularly.

Employee engagement is often seen as key to staff retention."

This year, we explored the employee experience and discovered that 46% of businesses engaged staff through offering flexible working hours, with 30% engaging with their teams through social activities, and a similar number offering learning and development opportunities. More "modern" concepts, such as health and wellbeing initiatives (25%) and financial wellbeing support (16%), were also in play. Although not practical in certain business areas, home working, for some, could be accommodated and 12% of businesses had engaged with that practice.

Is there optimism? Well, the answer would appear to be yes! For now, the businesses said they could attract the right staff but there was slightly less confidence in whether the sector is attractive for future staff recruitment. There is a stronger feeling of optimism around the economy for 2023 and 2024, with the majority Net Promoter Scores of six and above (page 26). As for being ready, the answer was a clear yes, for both the short term and longer term.

SEA LION BAY



Zoo's ambition to be a sustainable superstar

Banham Zoo, run by the Zoological Society of East Anglia (ZSEA), is on a mission to become a flagship of sustainability.

Claudia Roberts, Chief Executive of ZSEA, said that, last year, the zoo created a route map to become an example of what sustainability should look like, based around the UN's 17 sustainability goals.

"We feel very much that we need to be responsibility superstars in this area. We also believe, as a zoo that cares about sustainability and life on the planet, we have a mission to be a flagship for sustainable tourism. We've created a route map so we can get there," she said.

Sustainability is always about the art of the possible, and making use of what is available around you. Utilising waste, including a plan to use the 740 tonnes of animal manure generated every year, in a biofuel boiler to heat

some of the larger buildings on the site, is one such opportunity.



We want to be a place where children can come and see how to recycle."

Claudia explained, "We're collecting water from our buildings to use in our sea lion pool. This is a resource that comes into the world in winter, and

we utilise it when we need to make changes in the summer."

Supply is another area that can be brought into a sustainability plan. Food and drinks can be sourced as locally as possible and, ideally, items such as toys in the gift shop should be locally produced and, certainly, made from recyclable materials.

With an abundance of roof space on the site, there's potential to generate enough energy from solar panels, although the initial outlay is high.

"The most important thing I've learnt about change in organisations, over the last few years, is that, if you want true change, it can't be led by one person. Everyone's got to do something small to make it happen

effectively. That doesn't happen overnight. You start with one or two believers and then you get more and more," Claudia said.

"We've developed a corporate social responsibility programme, embedded across the organisation. Key takes from that are: to work with all our stakeholders and support our colleagues. Each person becomes an ambassador for their own area," she continued.

While the zoo retains its core purpose as part of an international breeding programme, there is also a wider plan to create wild habitats around the site for native species of plants and animals to thrive.



An environmental journey on the water

Since buying into their business, at Beccles, on the Norfolk-Suffolk border, nearly a decade ago, Simon and Mary Sparrow always wanted to create a sustainable and ethically aware holiday experience.

Mary said, "We try to make sure the water around us is kept clean. We use eco-responsible cleaning products and try to buy locally, which isn't always possible.

This year saw a milestone for Hippersons Boatyard, after being nominated as a finalist for Ethical, Responsible and Sustainable Tourism in the East of England Tourism Awards.

Mary says that, when they arrived on the site, there was no recycling of any description. "We were very aware that what we own is part of the Broads National Park, and if we don't look after it, it won't be there for future generations. It's part of its legacy."

Their first instinct when disposing of waste materials is to repurpose; furniture goes to a charity that helps people in need set up a first home, and bedding goes to a kennel and cattery company. If it can't be repurposed, then it's recycled.



Most of our day boats are electric and the diesel one uses synthetic fuel which burns more cleanly."

"Last year, we achieved a Green Tourism Silver award, and our goal is to get a Gold award. We entered the ethical award just to see how we would do. We're pleased to be a finalist. It's nice to know we're doing better than we thought."



Sustaining a virtuous circle at Holkham Hall

With its 25,000 acres and diverse areas of business, Holkham Estate is well-placed to be self-supporting in many of its environmental plans and ambitions.

Sustainability Manager, Sue Penlington, says the estate has created three goals that form an overarching thread across all aspects of the business.

Firstly, to enhance natural capital such as soil, air, water, biodiversity and public access; secondly, to become carbon negative by 2040; and the final goal is to reduce the amount of non-recycled waste generated by 10% a year over the next ten years.

"These goals are bold and ambitious, but really relevant to all the businesses.

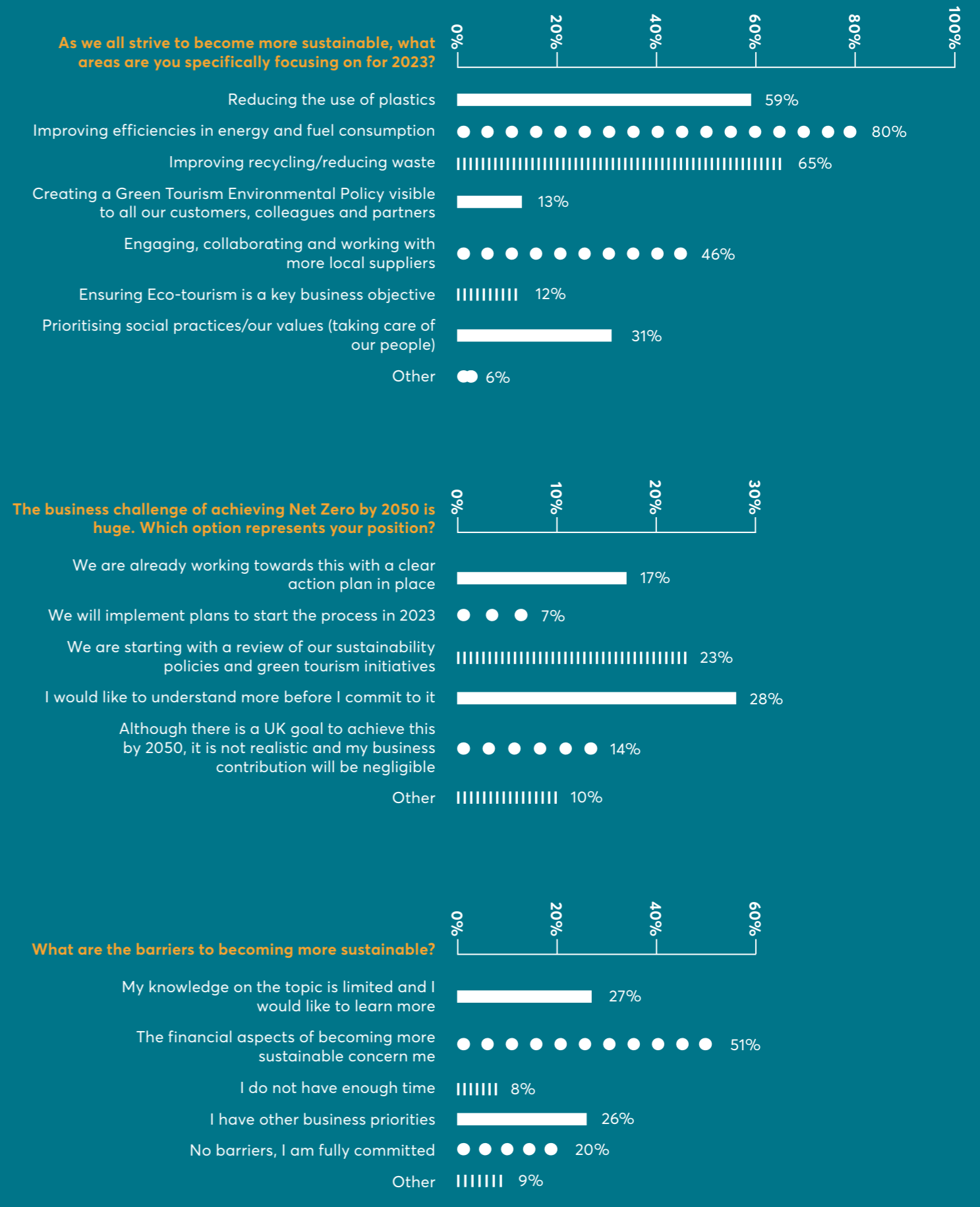
We have 280 core staff members, so the first tactic was staff engagement. A bottom-up strategy to harness their knowledge and expertise was created. If we can educate, support, inspire and motivate those individuals in all the businesses, then the ripple effect is massive, and we can make a real difference," Sue said.

With three cafés, a holiday park and a hotel with restaurant, Holkham aims to use local suppliers whenever possible.

"The Victoria uses a lot of local produce, as well as produce that's

grown in the walled garden, so our food miles there are really low. There's venison from the park and meat from the cattle which graze Holkham National Nature Reserve, just over the road from the Victoria. The manure goes back onto the arable fields, reducing our need for artificial inputs, and food waste and compostable packaging are turned into compost, which is used in the walled garden.

"If you're looking to achieve a circular economy, an estate is quite well set up for that," she said.



Customer experience driving investment and growth

The need to create new and enriched customer experiences, and adapt to changing expectations, means investment and growth is a central strategy for many tourism businesses in the region.

At ROARR! in Lenwade, Norfolk, Park Director Adam Goymour describes a programme of investment, over many years, that's looking to provide new and exciting experiences for their visitors.

More recently, some of the planned changes to the park were driven by necessity because of the pandemic but, overall, there's an ambition for ongoing inventiveness and improvement with a clear strategy behind it.



Our vision is to become the UK's number one dinosaur themed adventure park. We want to be the national go-to place for a dinosaur day out."

In 2021, the business invested £150,000 into its own IP and main park mascot characters, to create Dippy's Theatre, a 228-seater theatre, that provides daily interactive shows during school holidays and weekends, in the main season.

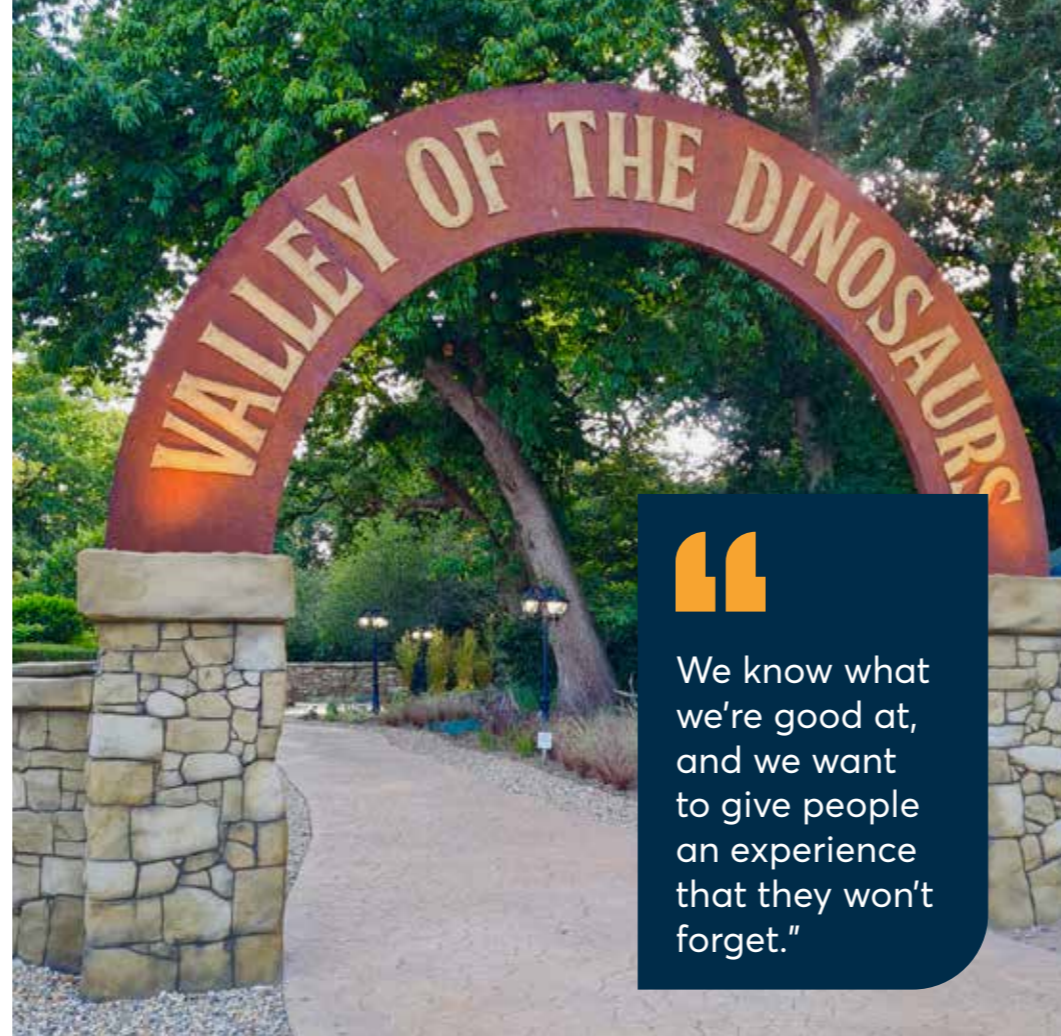
Although planned prior to the pandemic, it became a socially distanced indoor space as lockdown eased and visitors returned to attractions. At the same time, they invested in an outdoor dinosaur-themed track for their electric go-carts, called Dippy's Raceway, based on the park's mascot 'Dippy'.

The pandemic was also a driver for investment into digital development, as a way of reducing physical contact during and beyond the pandemic, that added value and improved guest experience.

"We made an initial investment, in 2020, of £10,000 into a park app that allowed our visitors to connect, seamlessly, every aspect of their visit. Visitors can upload their park entry tickets onto the app for a quick scan entry, order food any time on their mobiles and wayfind around the park to enjoy an AR trail experience on Valley of The Dinosaurs—to name a few benefits," he explained.

Investment has continued at ROARR! In the last two years, £190,000 has been spent on an existing attraction to become the Valley of the Dinosaurs, which includes an 812-metre tarmacked pathway, through the park, to aid accessibility, with animatronic dinosaurs throughout. In addition, Dippy's Exploration Adventure, an indoor themed maze with Dinosaurs, was built.

Sometimes it's the smaller changes



We know what we're good at, and we want to give people an experience that they won't forget."



Adam Goymour

that give customers the most memorable experiences. One that's proved very popular is The Magic Mirror at the end of the Valley, which creates shareable photographs with a variety of differently themed backgrounds.

In 2023, they added a Changing Places Facility to enhance accessibility. This is a fully accessible and private space for anyone who requires extra support and equipment to use the toilet—whether they're specifically visiting the Park or not. This state-of-the-art

facility includes a height-adjustable adult-sized changing bench, a hoist system, and enough space for multiple caregivers to assist with transfers. It also features a washbasin and a toilet with grab rails. The facility has been designed to meet the highest standards of accessibility, with thanks to South Norfolk and Broadland District Council and RISE.

"All of our attractions are included in the entry price, so our customers know how much they need to budget, especially important right now, at a time when we're all counting our pennies," Adam said.

Adam says there are more investments to come in summer 2023 and beyond, including in a five-acre area, within the existing site, that was granted planning permission at the beginning of 2023.

"We use surveys to help find out what people like, against our own innovative ideas, and we don't mind if we learn by making mistakes. We need to be big, bold and brave, and we have a clear strategy in place to achieve this."



Digital investment allows more customer focus

For Ruth Knight, at Norfolk Broads Direct and Broads Tours, technology has been a central part of making her business more efficient and enhancing customer experience.

"We purchased the business in December 2019, and one of the first things we had to do was close down when we went into the first lockdown. All our intentions of making things easier and learning about the business went out of the window," she said.

Ruth continued, "It was a successful and well-thought-out business, but very labour intensive with few IT systems. We had to find a way of using every member of staff to improve customer care, to the best of their ability, and spend more time with customers."

The result was an app that helps staff carry out their many day-to-day tasks, and provides customers with information about their stay, both before they arrive, as well as when they are out on the water.

Safety and equipment checks, such as fire alarms, life jackets, ladders, fridge and freezer temperatures, can be logged and recalled efficiently. Gas safety certificates, which previously were

printed out and kept in files, are now online.

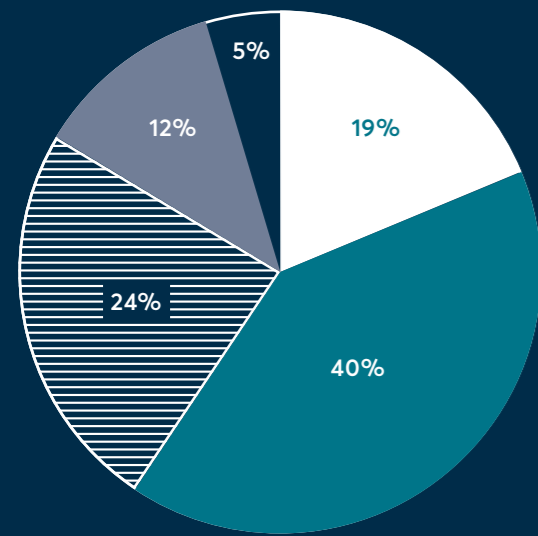
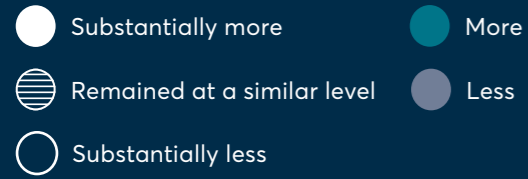
When the customers arrive, most of the paperwork and some of the boat familiarisation are already completed, which allows staff at the welcome desk to focus on the individuals.



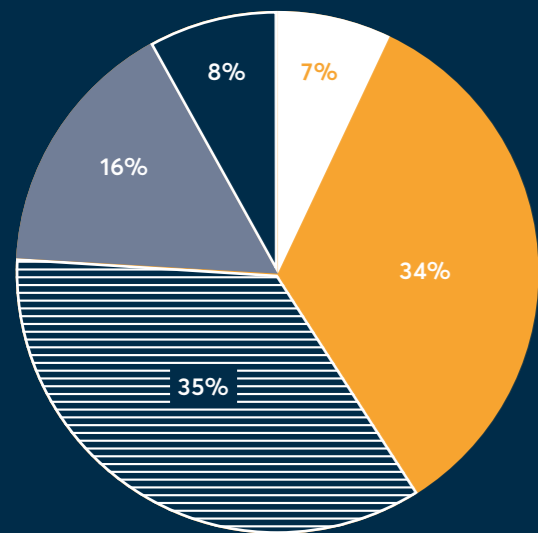
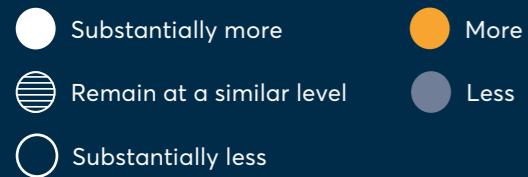
By giving them all the information they need before the holiday, we can focus on the essentials of making sure they have an enjoyable experience."

Turnover & profitability

How did your **turnover** in 2022 compare to 2021?

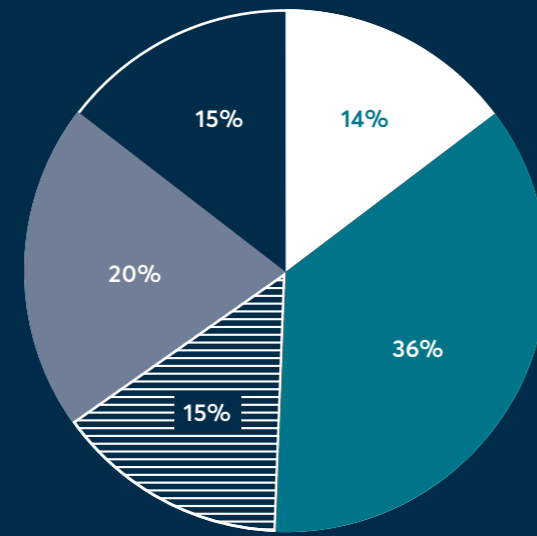
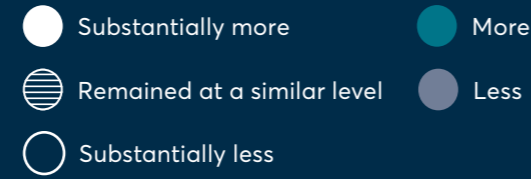


What is your prediction for **turnover** in 2023 compared to 2022?

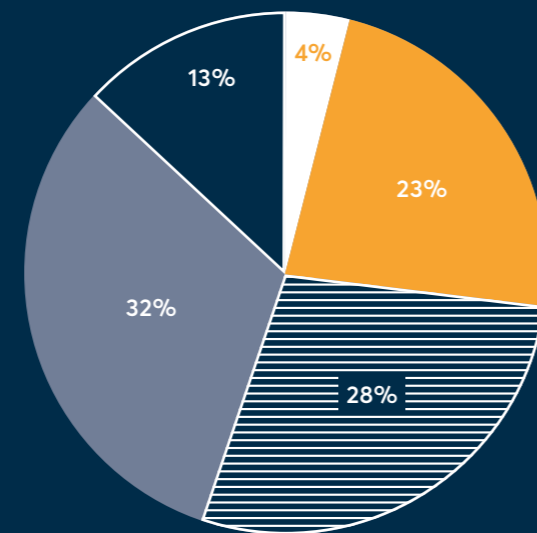
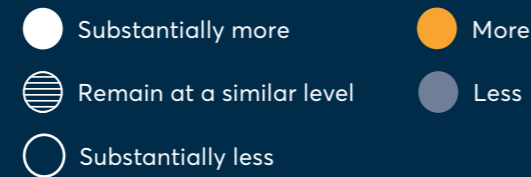


Growth & investment

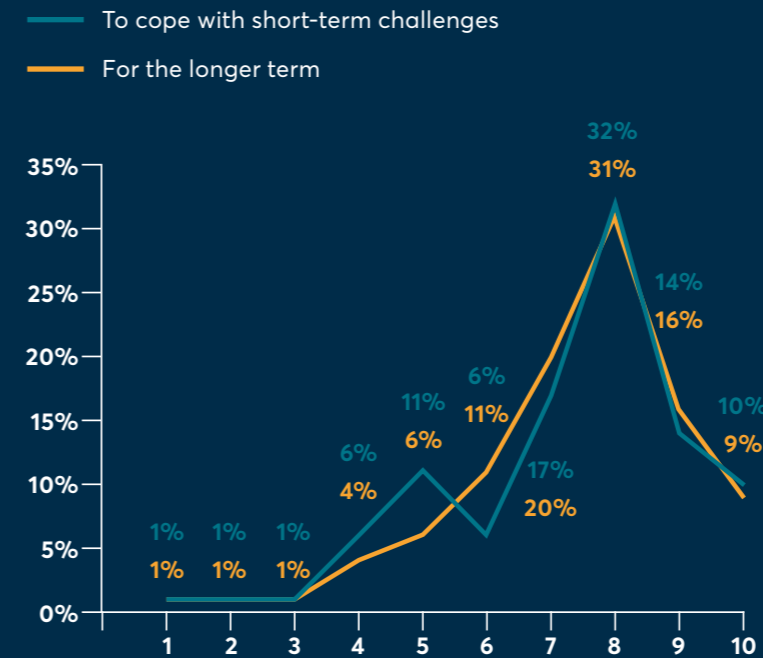
How did your **profit** in 2022 compare to 2021?



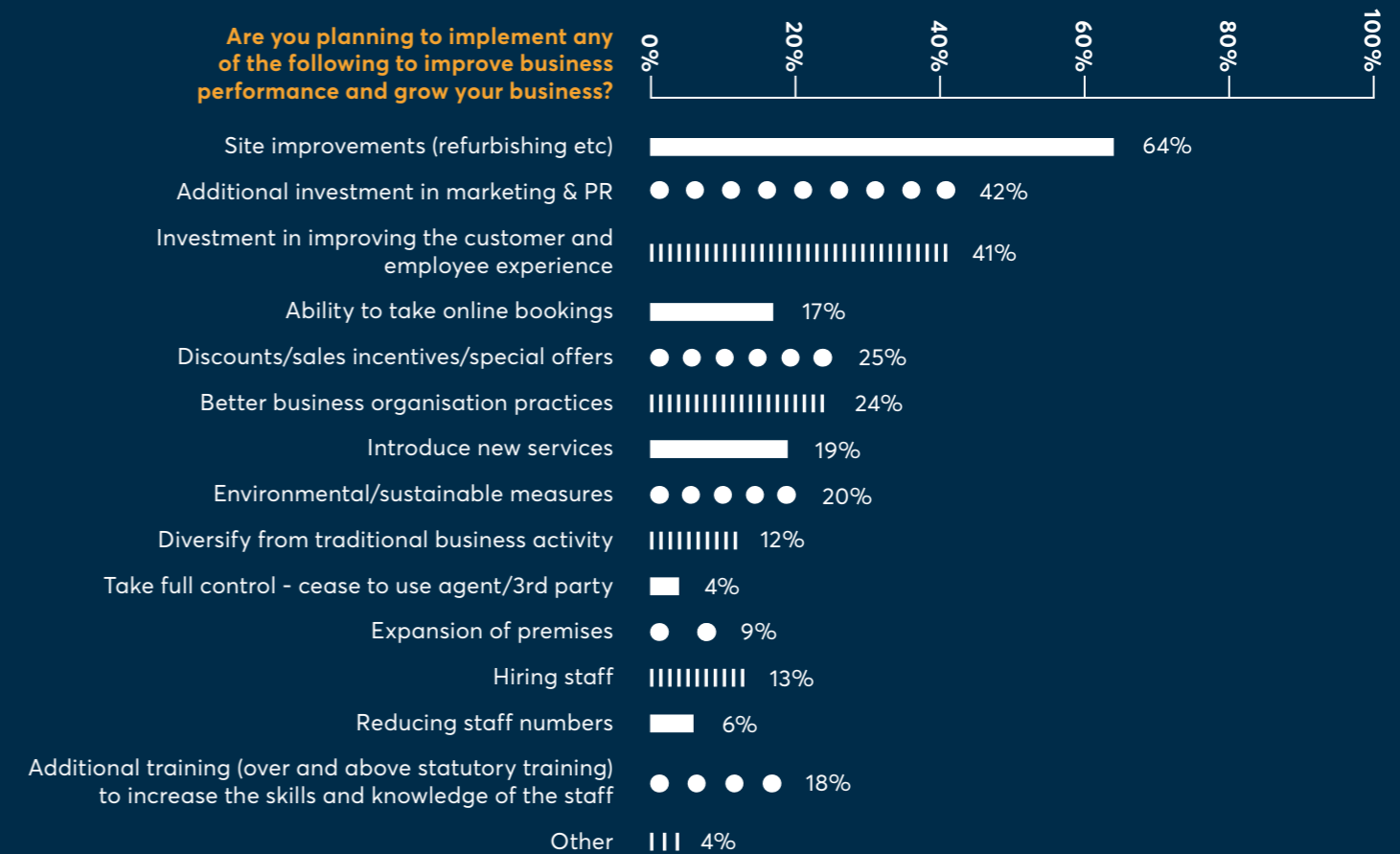
What is your prediction for **profit** in 2023 compared to 2022?



Net Promoter Scores (where 10 is extremely optimistic) please relate how optimistic you are feeling about the readiness of your business...



Are you planning to implement any of the following to improve business performance and grow your business?



Boosting your business with smart digital marketing

For family-run businesses that don't have a dedicated marketing team, and also larger businesses that do, there are many free or low-cost resources that can give your public profile a valuable boost.

For Mary Sparrow, at Hippersons Boatyard in Beccles, training and learning about marketing was the starting point.

"I worked with a business mentor to help me understand marketing. From that, I learnt some important lessons: talk to people, try different things out and always analyse the results so you can see what's working and what isn't," she said.



Google is our biggest seller. I don't do paid adverts, so making sure you've got your keywords and search engine optimisation in place is important."



Mary added, "We pay a company to look at our digital presence management to see that it's as good as it can be.

"After Google, our second biggest seller is Facebook. I belong to the Meta Boost Leaders Network, where you get a lot of training and advice on how to do social media. I keep all the data and track it. With our online bookings, we always ask questions on how they found us.

"We can see where our guests come from throughout the country so, when I do a review in November, I can see if there are areas where I can do some Facebook boosters to be more specific about where I am targeting."

Mary says that, this year, the business has made a conscious decision not to do any print advertising.

"Our print seems to have the smallest amount of return whenever I'm doing analysis. We've got more and more digital products promoting through

other channels, so we're looking at doing everything digitally. It's a bit of a risk, but one that's worth taking to find out what's working and what isn't."

Mary also uses two DMOs with strong digital presences, The Suffolk Coast, as well as Visit the Broads, which she chairs.

In the past, she's found that editorial coverage in national newspapers, where a journalist is offered a holiday experience in return for an article, is very effective. This has to be backed up by a good website so that readers can easily find, assess and book the holiday.

Review sites, such as Tripadvisor, are useful for getting feedback, finding out what people like or noting negative points that can be easily fixed. Sometimes it's best to respond to a negative review, but at other times, such as when people are critical of the Broads, other Tripadvisor users will often come to its defence.



Very often, it's the small things that leave an impression, especially when considering how to win valuable return business.

Mary explained, "All our welcome packs are full of local products which we tailor to our customers: chocolates, sweets for children, local beer, wine or champagne, even dog food. It's good to talk to your customers and get to know them. Guests come back year after year, and it's important to know why."



Reputation is everything for maintaining a loyal customer base

For Adnams' Director of Communications, Oliver Drury, innovation and multiple points of contact through products and premises are fundamental to successful marketing to a wide audience.

"Adnams is a very diversified business, we have 25 different beers and 440 types of wine, whisky, gin and vodka, with 13 shops, and our pubs and hotels. We are incredibly grateful for the breadth and depth of our contact with customers, and the relationship of trust is very important to us," he said.

"Our reputation is everything. People have to see we are an authentic brand, and we do that by being playful, honest and transparent."

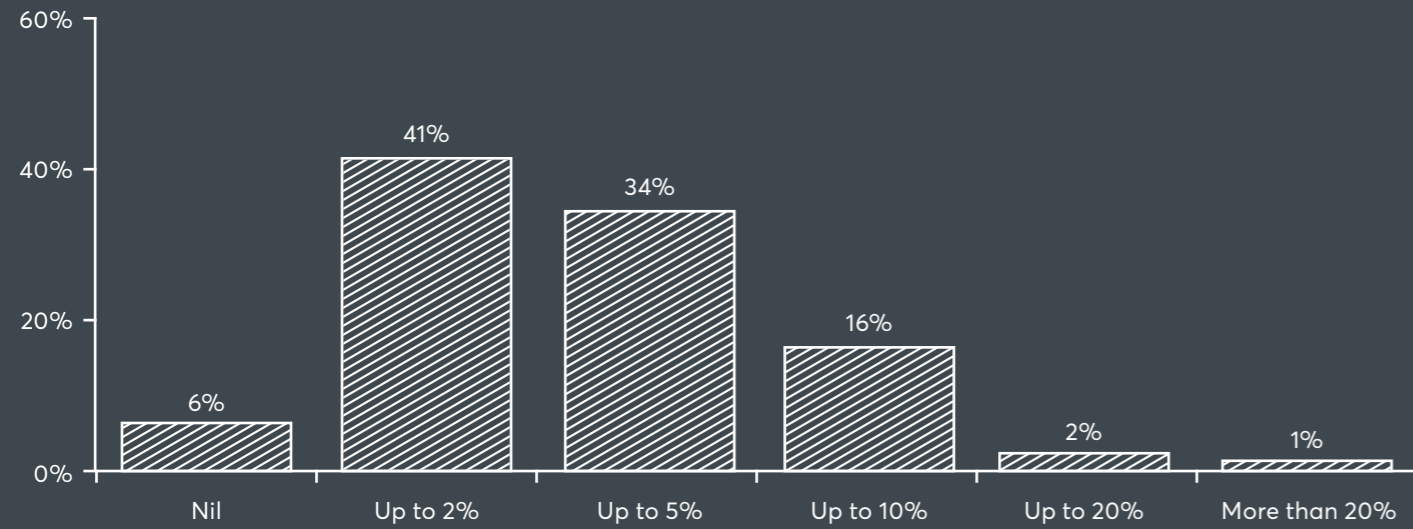
Oliver said that with the trend towards intergenerational visits, it's important to be able to offer something to everyone, so that as many people as possible can enjoy an Adnams experience.

"We like to be innovative and give people choice. We were early days pioneers of plant-based menus catering for vegetarians and vegans alike and have launched a gluten-free beer. Recognising differences and being inclusive for everyone's taste is very important for us," he said.

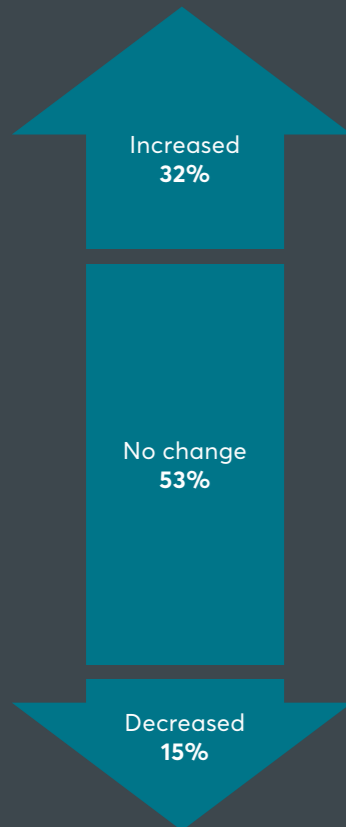
He describes how recommendation is a key part of having a strong marketing strategy. "We are very lucky in that our customers are so loyal to Adnams and our brand," he said.

Marketing & brand

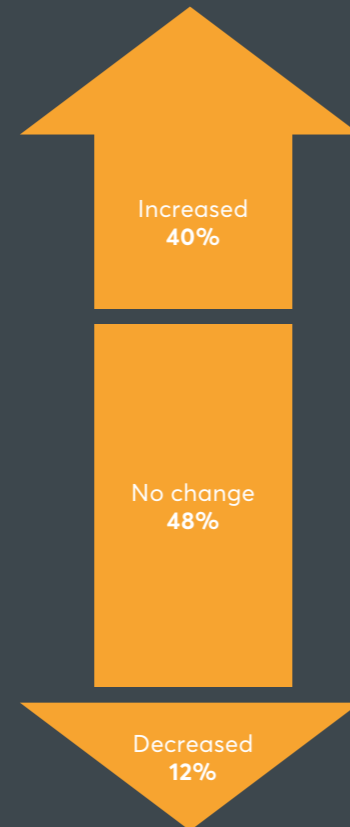
What proportion of your turnover was spent on marketing/promotion in 2022?



How did your marketing spend in 2022 compare to 2019?



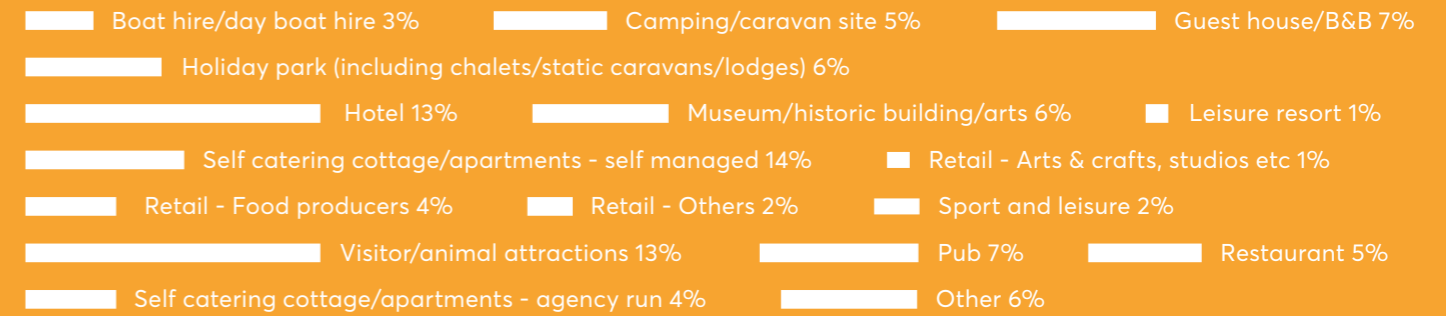
How will your marketing spend for 2023 compare to 2022?



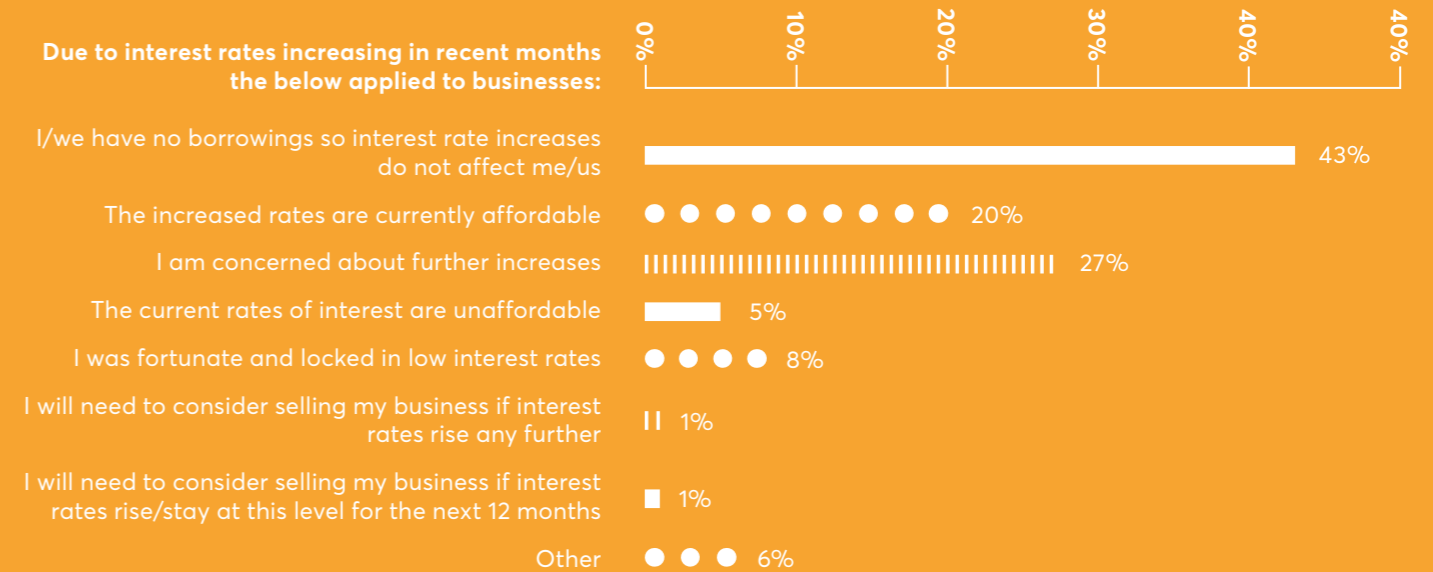
Marketing & brand



Type of business participating in the survey



Due to interest rates increasing in recent months the below applied to businesses:





A great experience makes the perfect day out

The UK tourism industry seems in agreement that, while trends are constantly in flux, there is a growing demand among consumers for experiences.

The influences driving change are many and complex, but the pandemic; the war in Ukraine; the cost of living crisis; rapidly evolving technology; and the way we exchange information; are all strong contenders.

Lucy Downing, Head of Marketing at Holkham in Norfolk, said, "We've definitely noticed that people want to be outdoors more. They're looking for activities and—I know it's been said a lot—experiences."

Lucy says there's also an increase in multi-generational groups of visitors. While the estate's gift shop has been busy, the items they stock are now relevant to activities, such as

gardening, and with a trend towards local handmade gifts and foods.

"We've seen an uplift in visitor numbers to food fairs. Our Easter Market was the busiest we've ever experienced, and the same with our Christmas Market, and the Norfolk Food Festival in September. We're seeing year-on-year growth with all of those. Even with the cost of living increasing, it seems that people are still happy to spend money on food. It's a treat you can justify," she said.

There's also been a trend for people to join different activities together so that they get the most out of their day. Sales reports have shown people are

still pre-booking and travelling further afield, with Holkham seeing a lot more day visitors from London, Essex, and beyond. "However," Lucy added, "we're beginning to notice a growing trend for people leaving booking later, which is sure to lead to spikier performance, that's very much linked to weather."

During the pandemic, and as lockdown eased, younger people tended to venture out first. This trend has been reflected in the 'youthifying' of the age demographic of visitors, including an increase in the number of families with young children.

"During Covid, we had to be more dynamic and experimental with our offering, and that has continued. It's definitely made us more proactive and attune to the zeitgeist. The people who adapted fastest were the ones that did well."



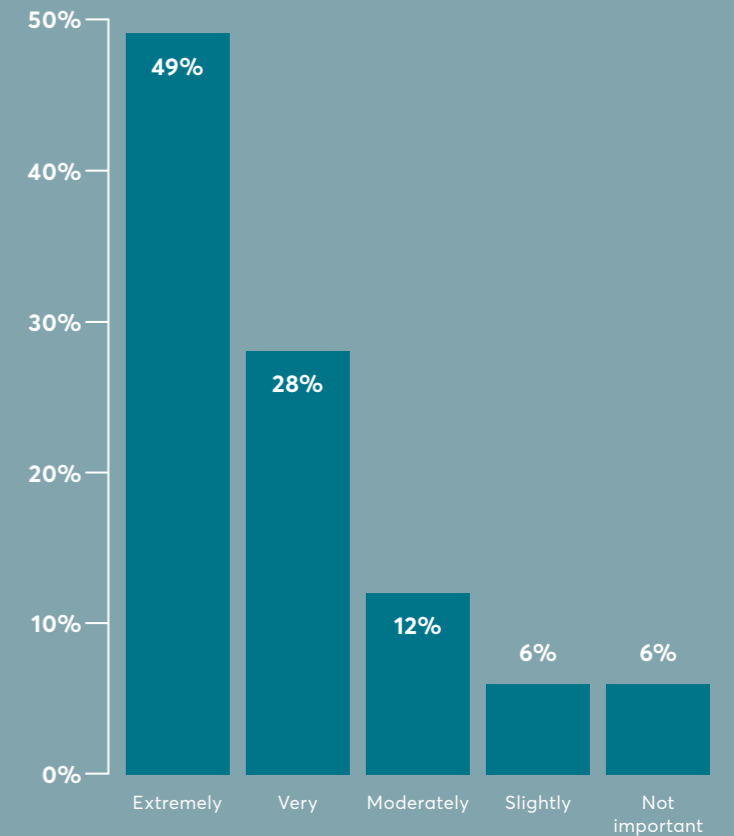
Ruth Knight, at Norfolk Broads Direct and Broads Tours, agrees that experiences are one of the growing trends within tourism, and can be used to introduce customers to the core area of the business.

"We found that with the passenger cruises, people like to go out for an event. During the February half-term, our passenger boats run pirate cruises, where we dress up the boat, have a pirate captain and commentary.

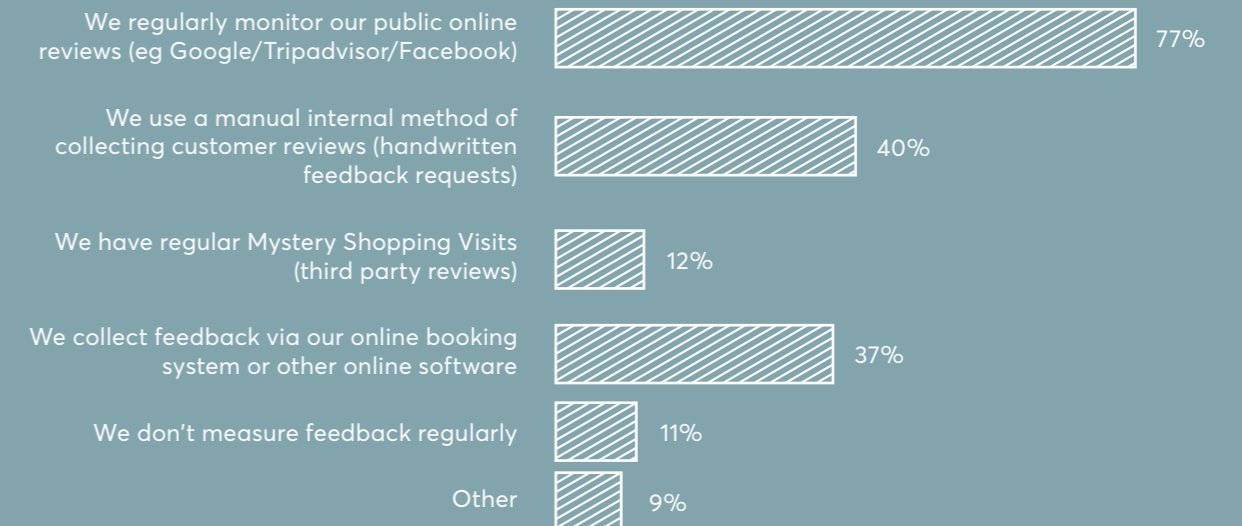
"In October half-term, it's Creepy Cruises, as our Vintage Broadsman boat turns into the Vintage Hauntsman. Last year, we were able to bring back our Santa Cruise with a floating grotto and good value presents, which really went down well.

"We don't advertise the cruises widely, but everyone who's been on them has an amazing time, and perhaps it introduces them to wanting to hire a boat," Ruth said.

How important do you feel it is to have a clear customer experience strategy as part of your overall business strategy?



Do you use any of the following methods to measure customer experience?





Staffing at the heart of the tourism industry

Providing a great holiday experience is all about having the right people in place at every step. We spoke to three businesses to find out how they approached the challenges of staffing.

For **Ruth Knight**, of Norfolk Broads Direct and Broads Tours, repeat business is a key part of her overall strategy. This means that customers must have the best experience possible, starting with their arrival on site.

Ruth said, "We believe that our staff need to have a strong sense of purpose, be challenged and really enjoy their work. They have to focus on what the customer needs at all times, and how they can help them to have the best experience."

"In return, we like to go above and beyond for our staff. The tourism industry isn't easy, with a lot of

weekend and bank holiday work. One of the things we did during the pandemic, was introduce an employee assistance programme, which offers confidential counselling. At the moment, the cost of living crisis is a real concern and we know people are worried about that."

Finding boat engineers can be a challenge. When Ruth, and her husband James, took over the business in 2019, there were a lot of experienced engineers but very few young people were being trained up.

"We've now addressed that issue. We have some youngsters coming up through the ranks, which I think is

important. It's good to have a mix of experienced people and people who are training," she said.

Claudia Roberts, Chief Executive of the Zoological Society of East Anglia, which incorporates Banham Zoo and Africa Alive, says her sites have now returned to pre-pandemic staffing levels, but with more concentration on visitor experience roles that focus on innovation and constant improvement.

She says staffing in the industry generally, and especially finding seasonal staff, is challenging.

"We're at an advantage because we work office hours and we offer a lot of flexibility around timings. It's still a challenging environment to hire the right people. We're really focusing on the under 25s, and our future vision is to train those people in sustainable tourism."

"We're also interested in the over 50s market; people who've left their jobs, like being busy, but don't want to work all year round. Some of them have management experience, and the younger people can learn from them as mentors. It's actually quite a good business model for tourism," Claudia said.

Adam Goymour is Park Director at ROARR! in Lenwade, Norfolk, which is the UK's largest dinosaur themed park.

He says that, although there's a general perception of staffing difficulties in the tourism and hospitality sector, as elsewhere, this hasn't affected his business in 2023.

"As we started recruiting for seasonal staff, prior to the main operating season in 2023, we were getting some really good people and not finding it difficult, certainly compared to previous years."



We've focused on our recruitment strategy especially, looking at how we label ads, what's going to resonate with people and what's attractive."

"We've improved our benefit scheme for our staff as well. All those little things add up."

"We're currently advertising for a health and safety manager and are getting a lot of candidates, which I think comes with our reputation as a business. We've built that over time. People can look at us and see we're investing, we're looking to the future, and that gives people the confidence that they're coming into a stable job," Adam said.

He continued, "We're a fun place to work, offer a good rate of pay over and above the national minimum wage, and offer flexible working. People who join us, know they'll get training and support, the opportunity to grow, and get to learn lots of different skills which are transferable. All those things make a difference."



Engaged employees drive top customer experiences

A well-trained and motivated workforce is key to creating the best possible experience for customers, says Judy Randon, of consultancy, insight6.

"For employees to feel engaged, they need to be having a fantastic experience of work. The environment and the way they are developed needs to be right. There should be great training with high confidence levels as a result, and a company culture that shows the business is invested in its people," she said.

While many businesses would like to believe that they have a happy workforce, research by Gallup has shown employee engagement in the UK is very low.

Judy explains, "If you're looking at a scale of 'engaged', 'moderately engaged' and 'disengaged', the research has shown the level of 'engaged' employees in the UK is about 9%; an alarming statistic in terms of productivity for many sectors in the UK.

"If somebody is fully engaged, it means that they are very happy and feel confident enough to be innovative. They go the extra mile, understand the company they are working for and want to be part of it. They totally understand what their purpose is within the company.

"It doesn't matter whether you're a manager, a team leader or whether you park cars. All of those people are as important as each other."

In tourism, as in many industries, recruitment and retention are major challenges, and businesses need to make their employee roles as attractive as possible.

Judy continued, "Employers have to be flexible. If you're looking for a full-time role and find someone who has a fantastic attitude but wants to work part-time, then you should consider taking them on and value their contribution, while working on a plan for another flexible employee who may have other strengths.

"Onboarding is also important. There are a lot of businesses that don't have a process and could do more. Somebody turns up for work on their first day and, after the usual tick box exercise is completed, is often left to just



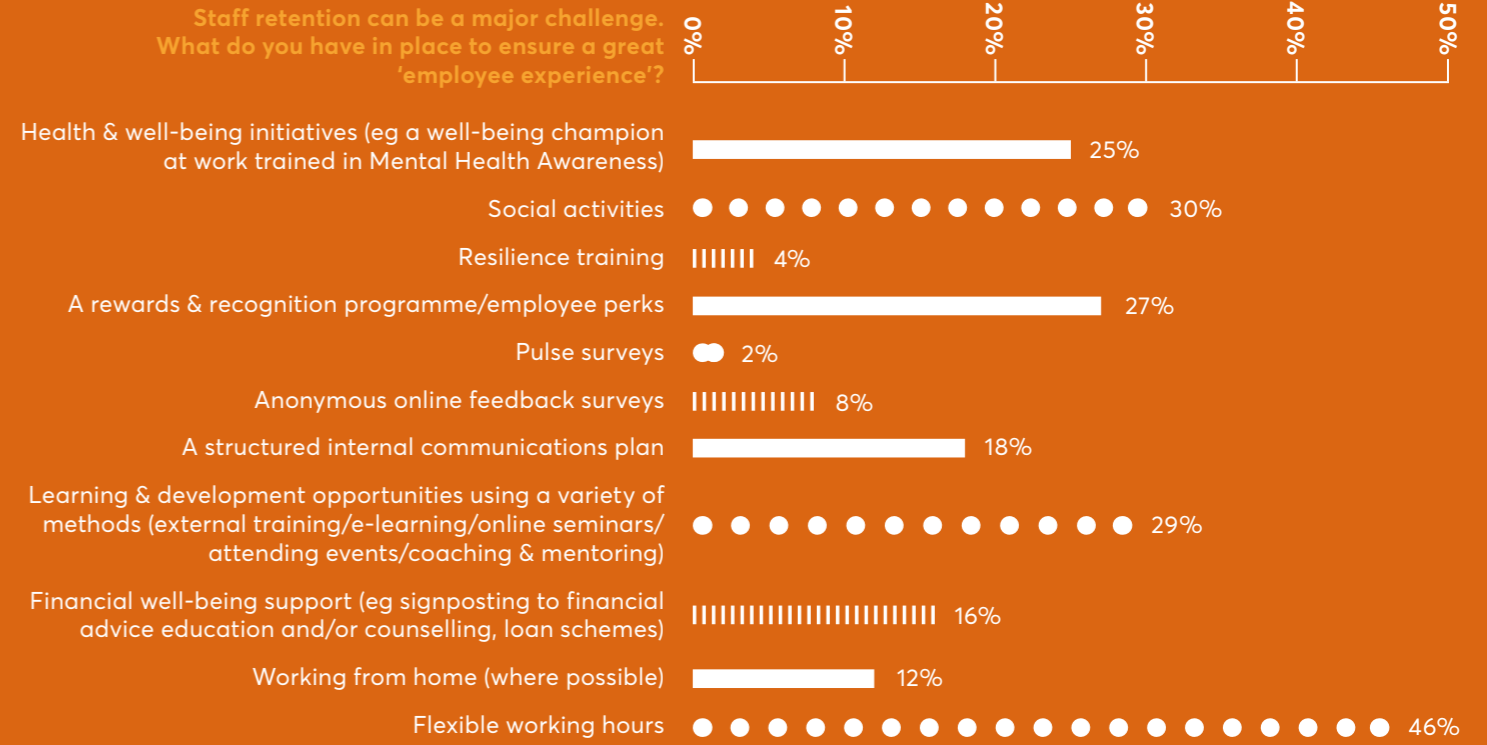
Judy Randon

muck in. While this may be fine for a few, most would welcome so much more in terms of genuine kindness and support to help them feel part of the team. First impressions are everything and you want them to have the right kind.

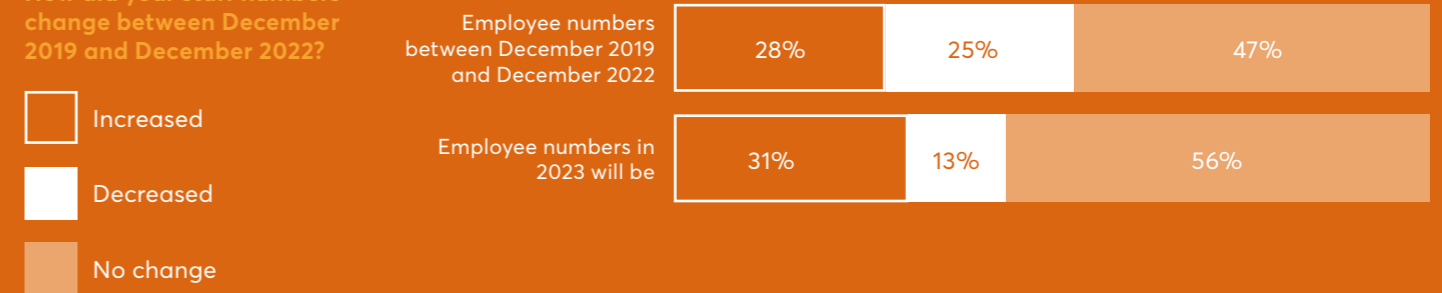
"Do what you can to help them learn new things, learn about the business and live the values. No one turns up to work to fail. Also, make sure you take time to appreciate them and say thank you. It costs nothing."

While it's important to be informed by data when drawing up a customer experience strategy that fits with your business strategy, knowledge of what your customers and employees actually feel, the storytelling aspect of your research, is what gives you the most actionable insights.

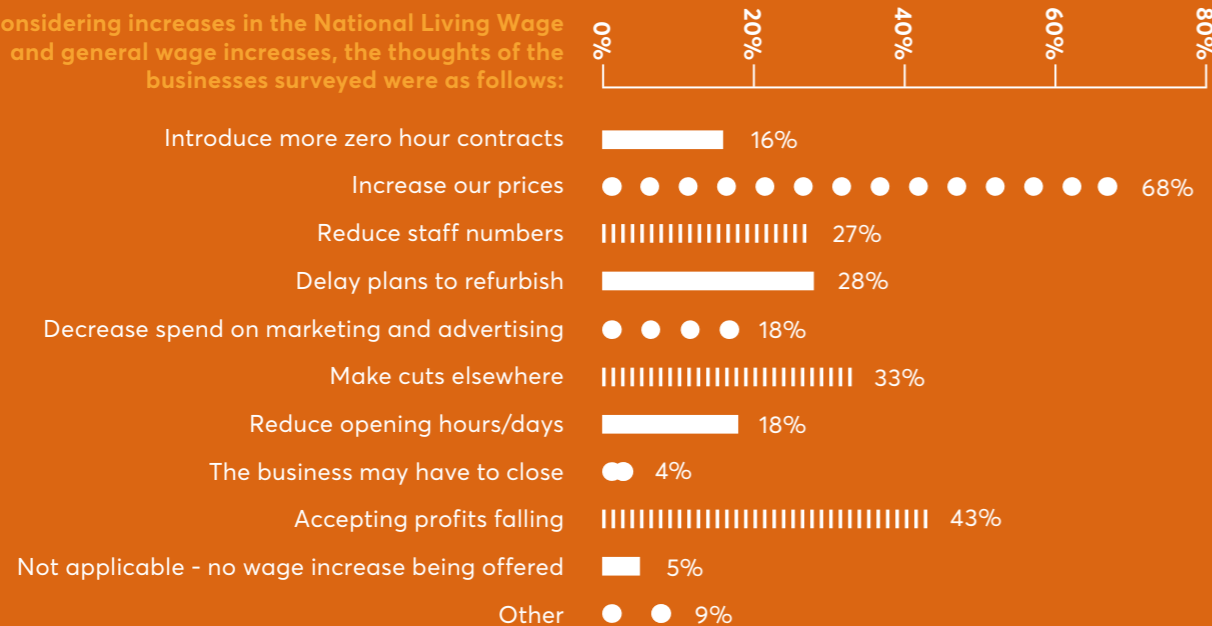
Staff retention can be a major challenge. What do you have in place to ensure a great 'employee experience'?



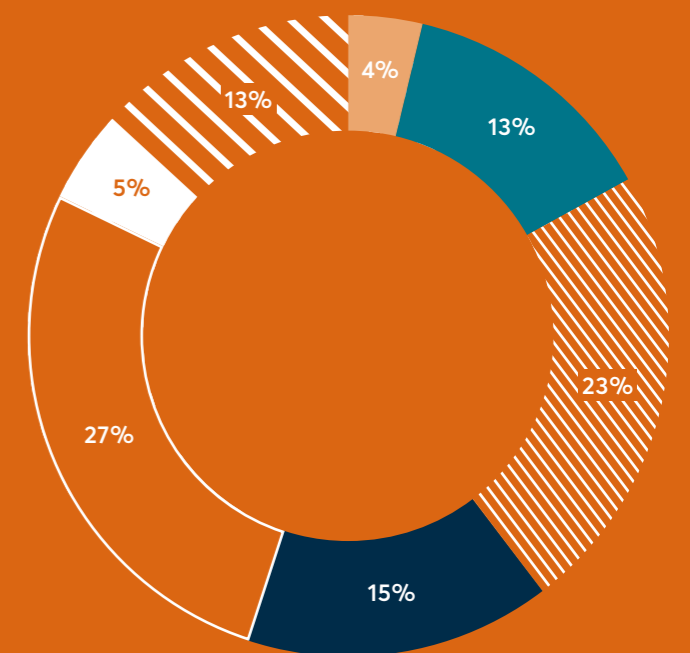
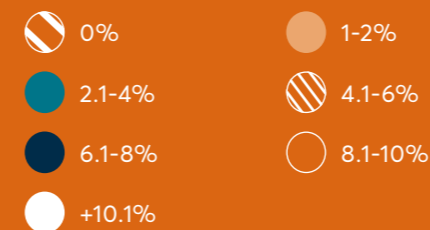
How did your staff numbers change between December 2019 and December 2022?



Considering increases in the National Living Wage and general wage increases, the thoughts of the businesses surveyed were as follows:



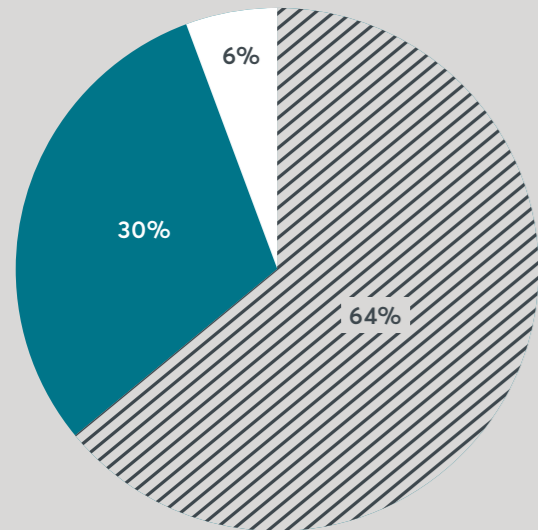
With the National Living Wage (NLW) moving to £10.42 in April 2023, an increase of 9.7%, and increases in National Minimum Wage (NMW) too, what percentage pay rise are you planning on giving to staff, as an average?



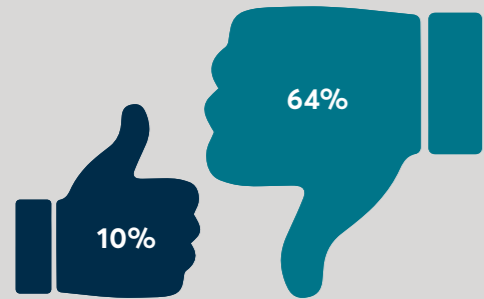
Support for the sector

Are you engaged with a DMO and/or Tourism Group?

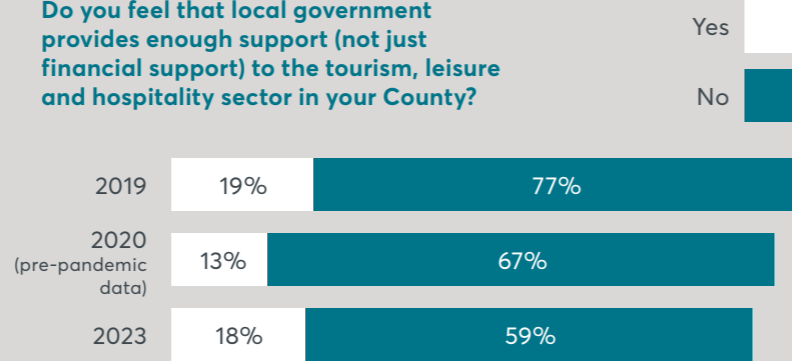
Yes
 No
 Don't know



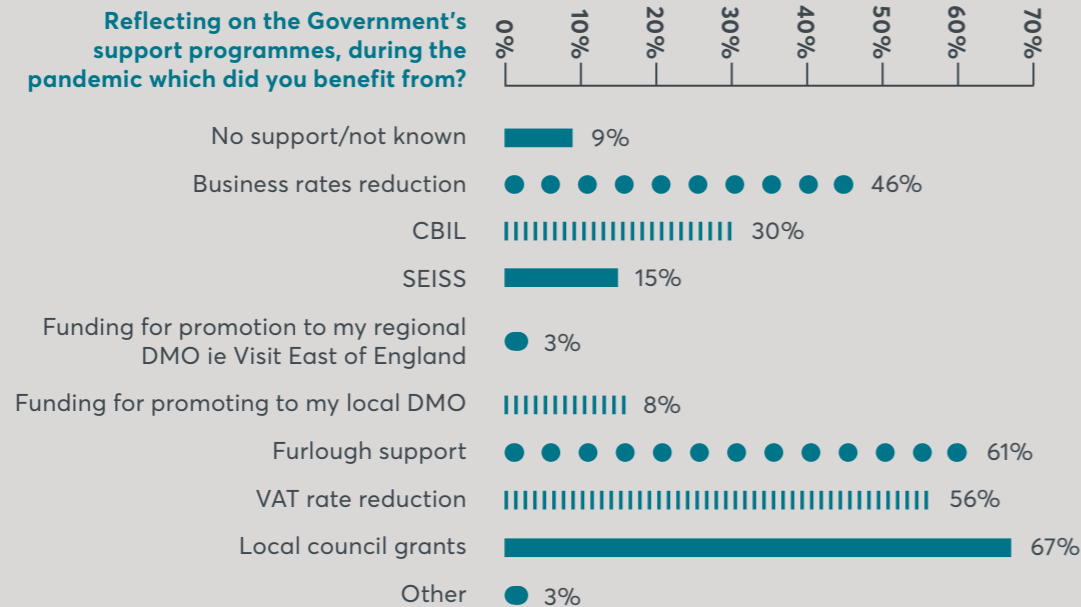
Do you feel that central government provides enough support (not just financial support) to the tourism, leisure and hospitality sector in your county?



Do you feel that local government provides enough support (not just financial support) to the tourism, leisure and hospitality sector in your County?

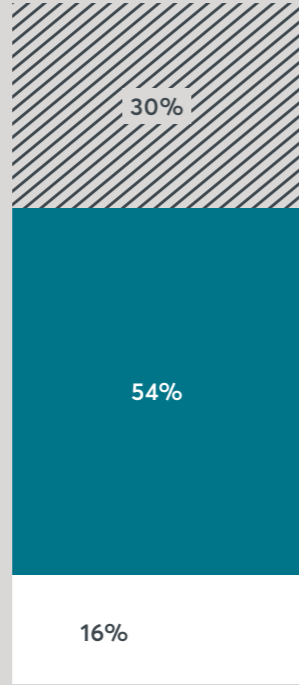


Reflecting on the Government's support programmes, during the pandemic which did you benefit from?



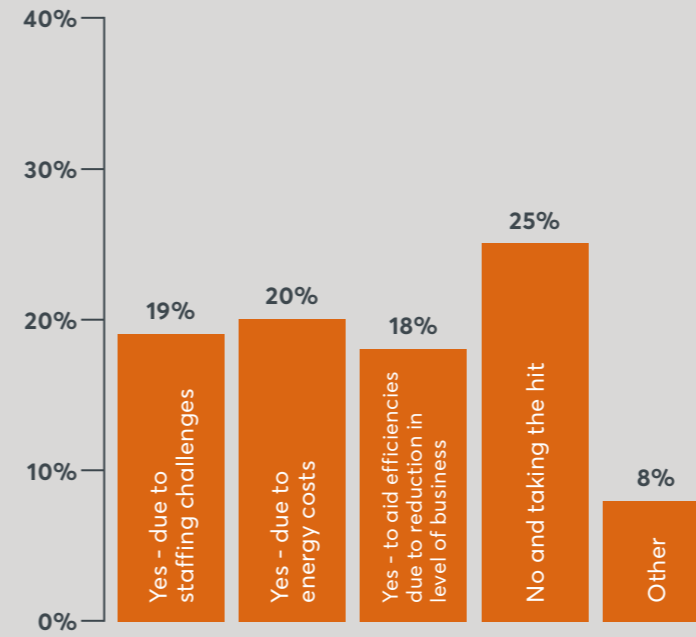
In your view, during the pandemic (March 2020 - December 2022) did the Government do:

Enough?
 More than expected?
 Not enough?



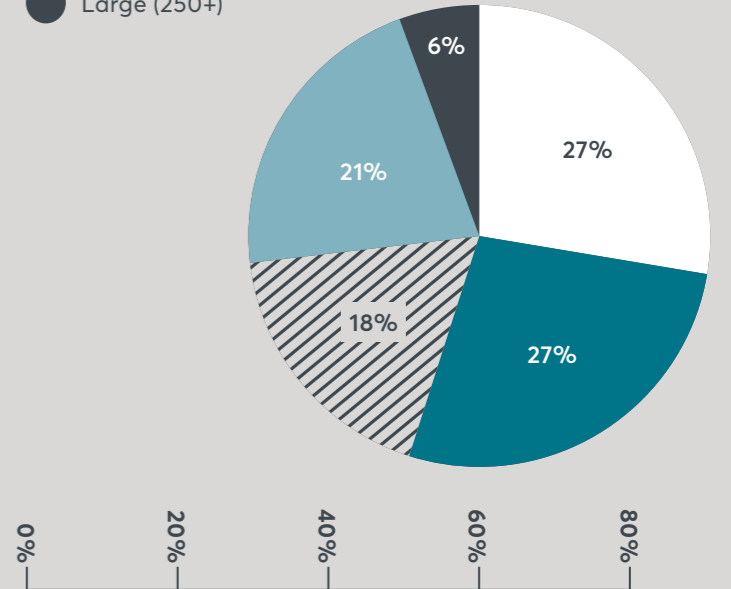
Challenges & business size

A number of businesses have reduced their operating hours or operating days to help mitigate current issues/challenges in the sector. Have you adjusted your operating hours?

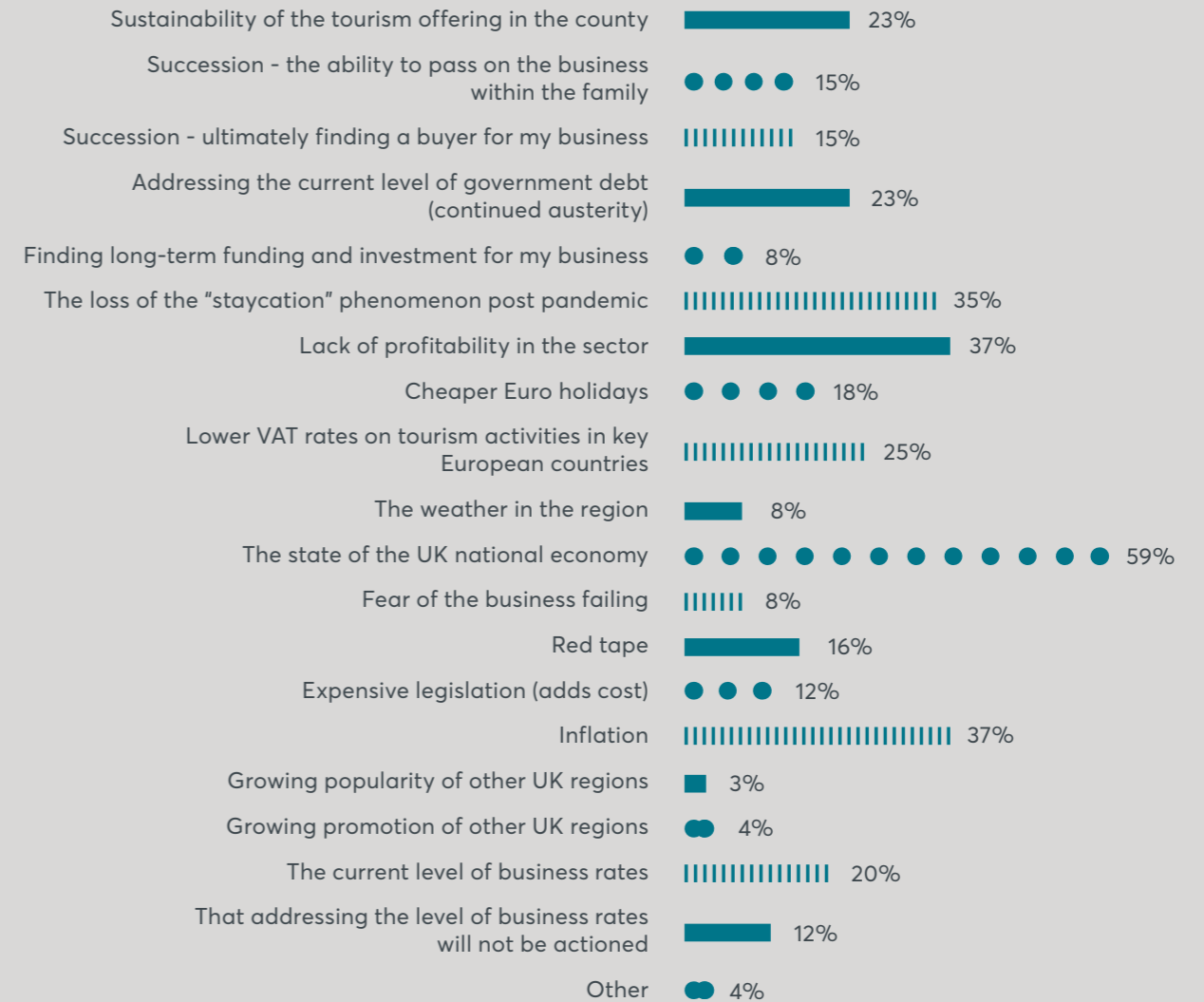


Size of businesses participating in survey (employee numbers)

Owner managed (none)
 Micro (1-10)
 Small (11-50)
 Medium (51-250)
 Large (250+)



Which key aspects worry you most about the future?

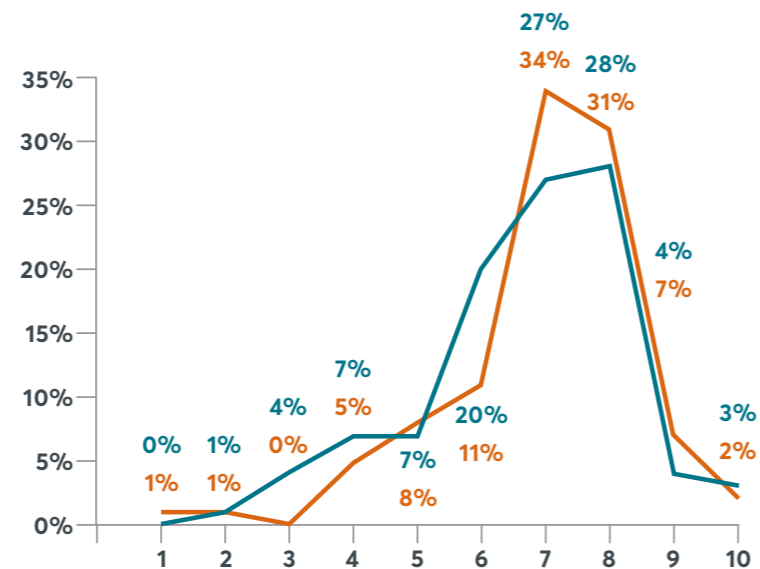




Net Promoter Scores (where 10 is extremely optimistic)...

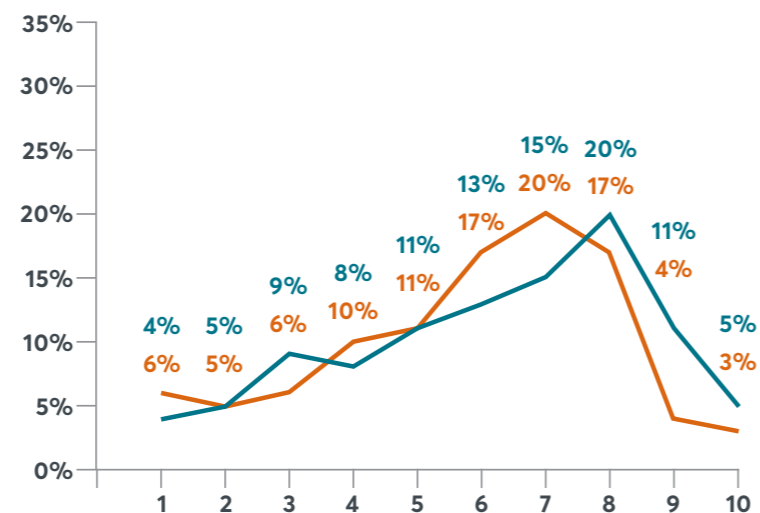
Please relate how optimistic you are feeling about the future of the following:

— The Local Tourism Economy for 2023
 — The Local Tourism Economy for 2024 and beyond



Please relate how optimistic you are feeling about the future of the following:

— Ability to attract the right staff now
 — Attractiveness of the sector for future staff recruitment



The last word

The three years since our last published survey have seen many challenges, but also provided new opportunities. Poorly drafted or vague regulations and processes implemented during the pandemic forced faster thinking, and we all found solutions to issues we never knew existed. We began lockdown with the cry of 'will we ever get back to normal?', and then we all looked forward to the new normal, whatever that was!

Brexit, COVID-19 and lockdowns have changed what we all knew to be 'normal'. Staff shortages, a war in Ukraine, unprecedented energy costs, rising interest rates, inflation (at levels not seen for more than a generation), and the subsequent cost-of-living crisis, mean that the sector that was 'hit first, hit hardest and hit longest' is being challenged once again.

The efforts of local DMO's, working closely with regional brands and Visit East of England, have helped many during this tough period. Therefore, I offer no apology for calling for these organisations to be given your support in return, to enable them to operate for the benefit of the areas they represent.

I would like to thank the businesses who gave up their time to take part in the survey, which has again been well supported, and to all the DMO's and regional brands for their hard work over the last three years and for their support for our survey. A massive thank you to our commercial partners Adnams, Camplings, Lloyds Bank and Insight6. I hope you enjoy reading through so much valuable content from local businesses generously sharing their stories and insights within these pages, their contribution is invaluable.

And finally, if you would like even more insight into business, career journeys and the sharing of tips and successes in the sector, then look out for our podcast series Tourism Business Chat, which is back for 2023!

tourism BUSINESS CHAT

with Chris Scargill

Listen now on



Find out more at larking-gowen.co.uk/tourism-insights

Back for Series 4!

Upcoming guests include:



Former guests include:

Adnams | Chestnut Group | Thursford | Wiveton Hall Farm | Norfolk Broads Direct | Imperial Hotel | Norfolk & Suffolk Tourist Attractions | insight6 | Wivenhoe House Hotel | Hank's Dirty | Swiss Camplings | The Assembly House | Woodland Holiday Park

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