

DMO Summer Survey 2025



Committed to you.











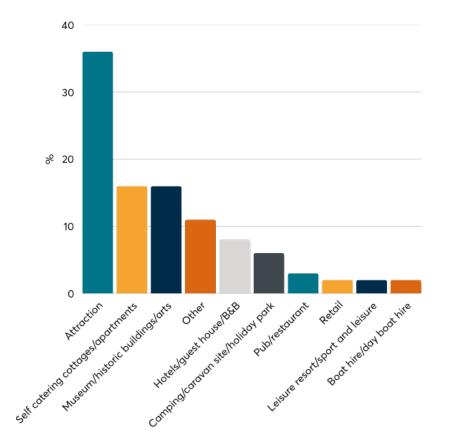




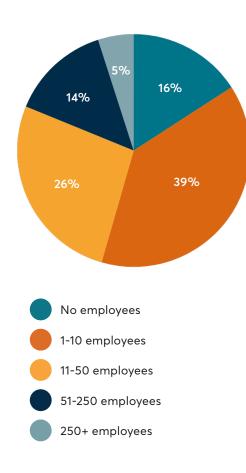
Over the summer, we collaborated with Destination Management Organisations (DMOs) across East Anglia to gain insights into the current sentiment and challenges facing the tourism, leisure, and hospitality sector in the region. By conducting a structured survey and comparing the results with data from the same period last year, we were able to assess sector performance and identify the impact of external factors on business operations.

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 one DMO.

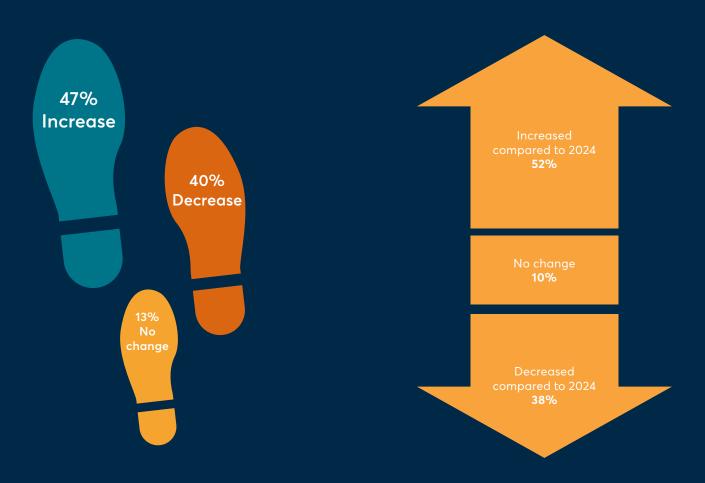


Size of businesses participating in the survey



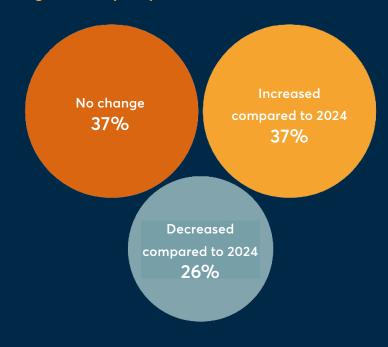
Summer period footfall

Changes to gate admission, tickets sales and bookings



Sentiment around footfall, ticket sales, and bookings mirrored last year's trends. Increased footfall was attributed to improved weather, enhanced marketing, and new offerings. Conversely, declines were generally linked to ongoing cost-of-living pressures, which reduced disposable income and led to lower visitor numbers or spending per head.

Changes to occupancy rates



Occupancy rate changes varied, with just over one-third of respondents reporting an increase and another third indicating stability.

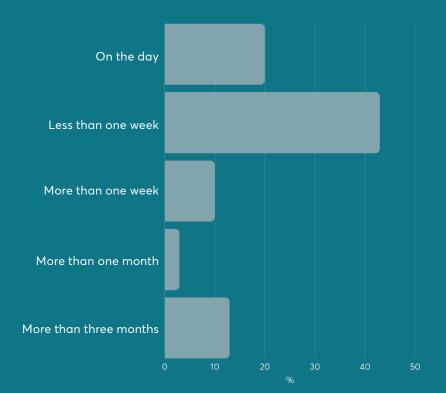
Advance bookings: Attractions

Short-term bookings remain dominant, with over two-thirds made within seven days of visiting—consistent with last year's pattern.

This reflects evolving consumer behaviour driven by:

- Economic uncertainty, prompting visitors to delay commitments.
- Weather dependency, especially for outdoor attractions.
- Digital convenience, enabling spontaneous planning.
- Shifting leisure habits, influenced by social media and peer recommendations.

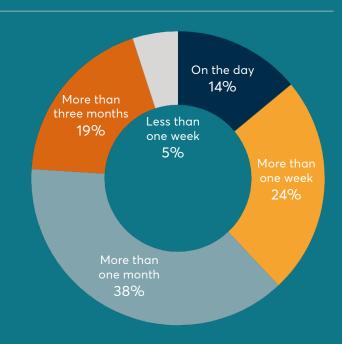
This trend poses challenges for forecasting and resource planning, but also offers opportunities for agile marketing and flexible operations.



Advance bookings for accommodation

Advance accommodation bookings have declined slightly compared to previous surveys, with only 57% of businesses reporting bookings made one month or more in advance (down from 77% in Autumn 2024 and 68% in Summer 2024). This suggests a shift toward shorter planning horizons, potentially influenced by economic uncertainty or changing consumer behaviour.

For pubs and restaurants, bookings remain predominantly short-term, with just 10% of advance reservations made more than one week ahead. This trend may reflect more spontaneous dining habits or reduced consumer confidence in committing to plans further in advance.

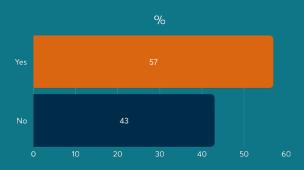


Changes to opening hours



73% have not changed their bookable hours.

Special offers

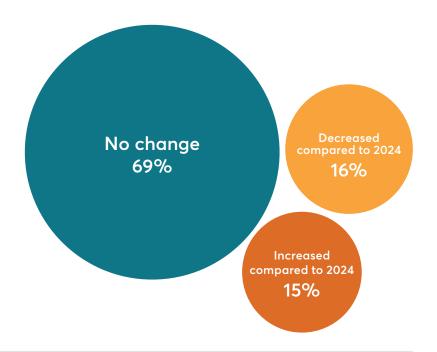


Staffing

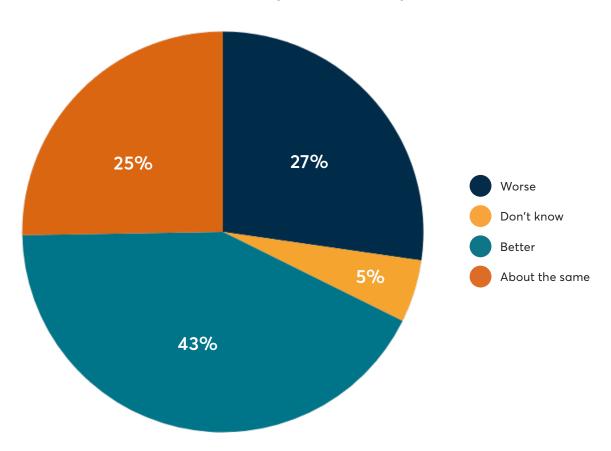
Staffing levels remained broadly stable compared to previous years.

Approximately 70% of respondents reported no change in staffing numbers, with the remainder evenly split between increases and decreases.

Where changes occurred, they were partly influenced by seasonal working patterns, with some organisations adjusting staffing levels in response to peak periods or event schedules, leading to temporary increases or reductions.



How did businesses rate their overall performance compared to 2024

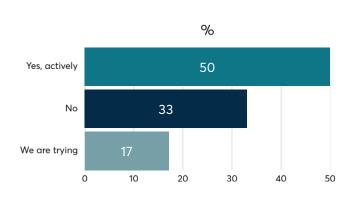


2025 performance ratings were mixed, though 43% of businesses reported improvement—up from 37% the previous year. Despite this, many faced ongoing challenges, including:

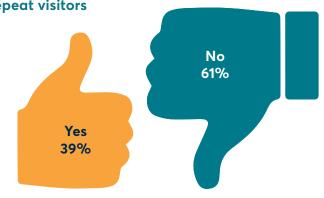
- · Rising costs from National Insurance and National Living Wage increases;
- Continued cost-of-living pressures reducing consumer spending;
- A lack of targeted support, especially for smaller operators;
- Declining tourism in East Anglia, impacting footfall and demand.

These factors contributed to a cautious overall outlook.

Attracting locals



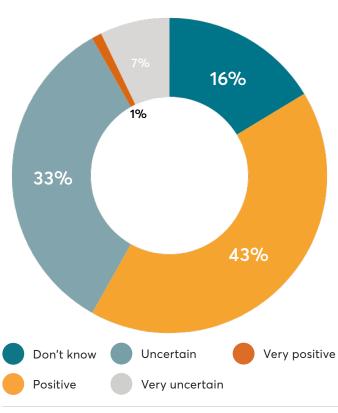
Repeat visitors

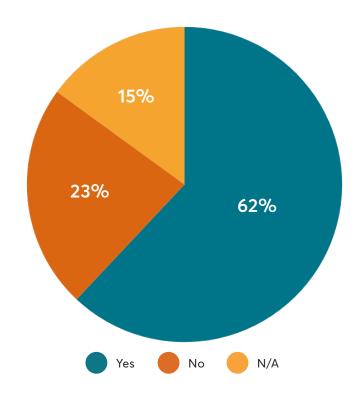


Positivity for Autumn/Winter 2025

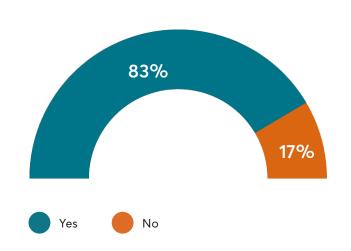








Will trading in 2026 be as much of a challenge?



As we look ahead to 2026, the outlook was widely perceived as challenging, with 83% of people expecting increased difficulties across the sector.

The costs of living and persistent economic pressures continue to strain both households and businesses. Regulatory changes and shifting government policies are driving uncertainty, making long-term planning increasingly complex.

For many, it's simply "always a challenge" to stay ahead. Compounding this are increased operational costs, budgeted tax hikes, and minimum wage adjustments. Speculation around the **forthcoming budget** only adds to the unease, as stakeholders brace for potential impacts that could further reshape the economic landscape.



Get involved, your opinion matters.

Each year, we ask hundreds of East Anglian tourism, leisure and hospitality businesses to



Committed to you.



@larkinggowen



Scan to get in touch with our team and find out more information.