



# Tourism Business Monitor

## Prepared for: Visit Great Yarmouth

### October 2025

Prepared by:



On behalf of:



## Introduction and Methodology and approach

The Greater Yarmouth Business Confidence Monitor is a short, quarterly survey of tourism businesses designed to understand opinions about recent business performance, the outlook for the immediate future, trading conditions and levels of confidence.

### **Methodology**

The results are based on a quarterly online survey to businesses in the Greater Yarmouth area. It uses a structured questionnaire, adapting some questions and adding / removing other questions as the season evolves. We are using a 'Have your say' online platform style survey, based on personalised email invitations to fill in a short online questionnaire. The survey is fully managed in-house by Destination Research using SNAP software package, which offers full online and mobile functionalities. The results of the survey are being used and distributed by Visit Great Yarmouth.

### **Outputs**

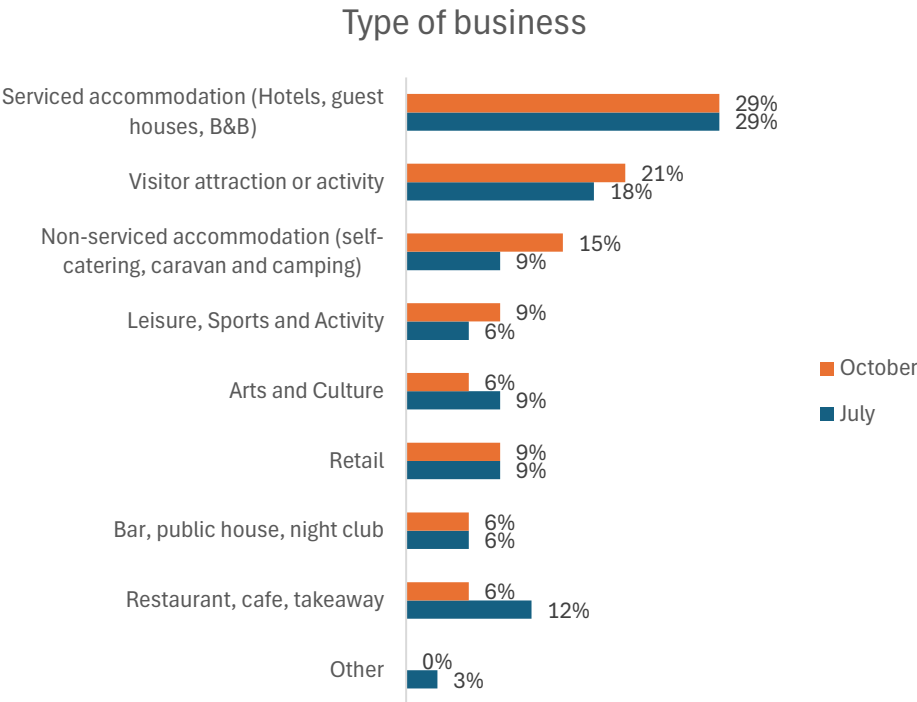
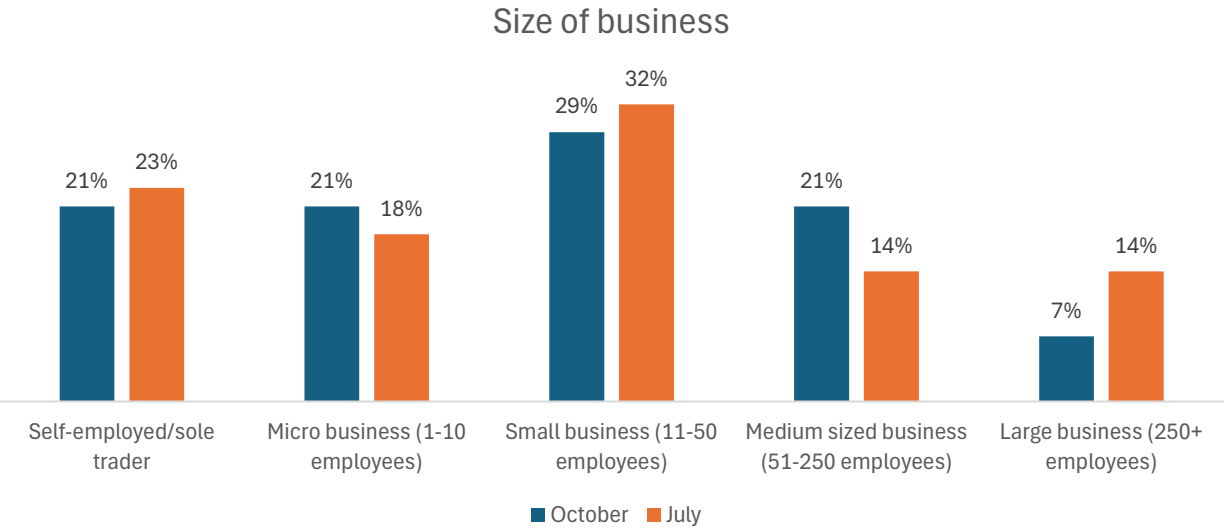
The report reflects on the very latest industry sentiment. This and subsequent reports will include a summary of immediate reactions, longer term recovery plan actions as well as general business performance. This edition is based on a sample of 33 responses.



Research Outputs – Business profile

Overall, October showed mixed shifts across sectors. Visitor attractions or activities increased from 18% in July to 21% in October, while serviced accommodation stayed unchanged at 29%. Non-serviced accommodation declined from 15% to 9%. Restaurants, cafés, and takeaways fell from 12% to 6%, and arts and culture decreased from 9% to 6%. Leisure, sports, and activity increased from 6% to 9%, while retail remained unchanged at 9%.

The business size profile also shifted slightly. The proportion of self-employed/sole traders decreased from 23% in July to 21% in October. Micro businesses (1–10 employees) increased from 18% to 21%, while small businesses (11–50 employees) fell from 32% to 29%. Medium-sized businesses (51–250 employees) increased from 14% to 21%, while large businesses (250+ employees) decreased from 14% to 7%.



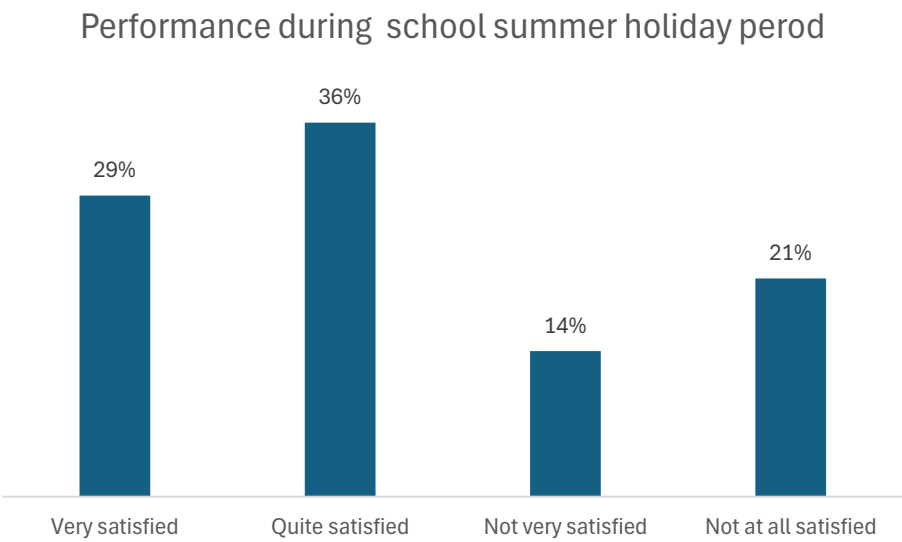
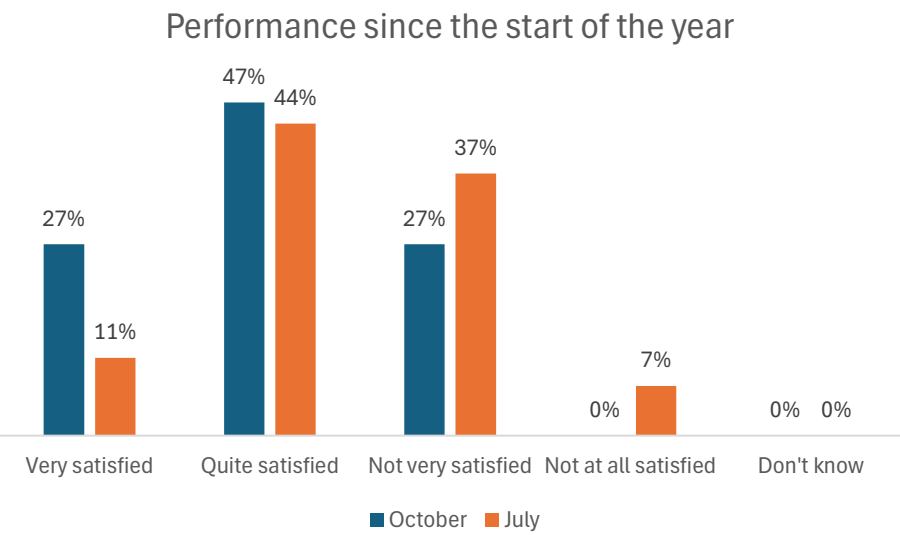
Q: Which Tourism and Hospitality sector does your main business principally operate in? (33) Q: And which of the following best describes your business? (33)



## Research Outputs – Recent performance

Between July and October, satisfaction improved. Very satisfied rose from 11% to 27%, and quite satisfied was broadly stable (47% vs 44%). Not very satisfied decreased from 37% to 27%, and not at all satisfied fell from 7% to 0%.

During the school summer holiday period, satisfaction was mixed: 36% somewhat satisfied, 29% very satisfied, 14% not very satisfied, and 21% not at all satisfied.



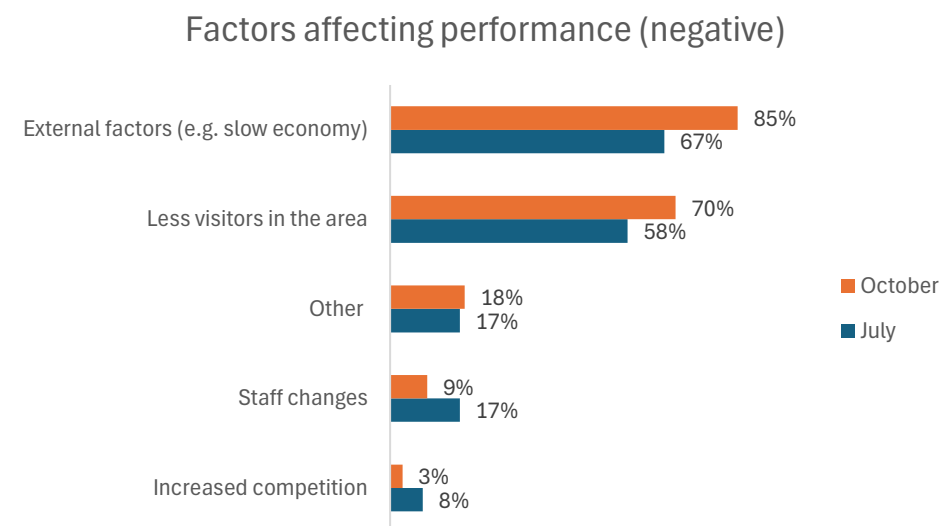
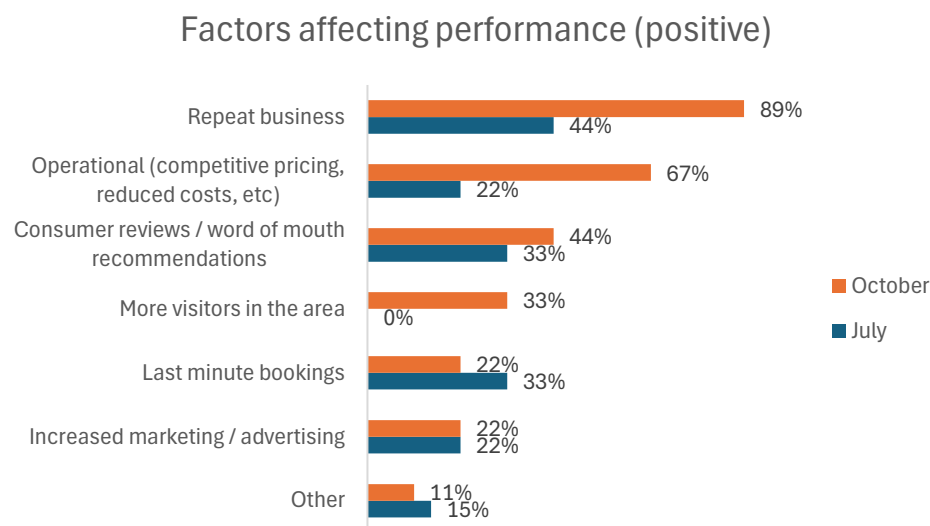
*Q: How satisfied have you been with the performance of your business during the school summer holiday period? (33) Q: And, overall, how satisfied are you with the performance of your business since the start of 2025 until now? (33)*



## Research Outputs – Factors influencing performance

In October, repeat business was the strongest positive factor, increasing from 44% in July to 89%. Operational changes (pricing/costs) rose from 22% to 67%. Consumer reviews/word of mouth were 33% vs 44%, more visitors in the area increased from 0% to 33%, last-minute bookings from 22% to 33%, and marketing held around 22%.

External factors remained the top negative influence, rising from 67% to 85%. Fewer visitors in the area increased from 58% to 70%. Staff changes decreased from 17% to 9%, and increased competition fell from 8% to 3%. “Other” negatives were stable (17% vs 18%).



Q: What factors have influenced the recent performance of your business? (33)



## Research Outputs – Business forecast

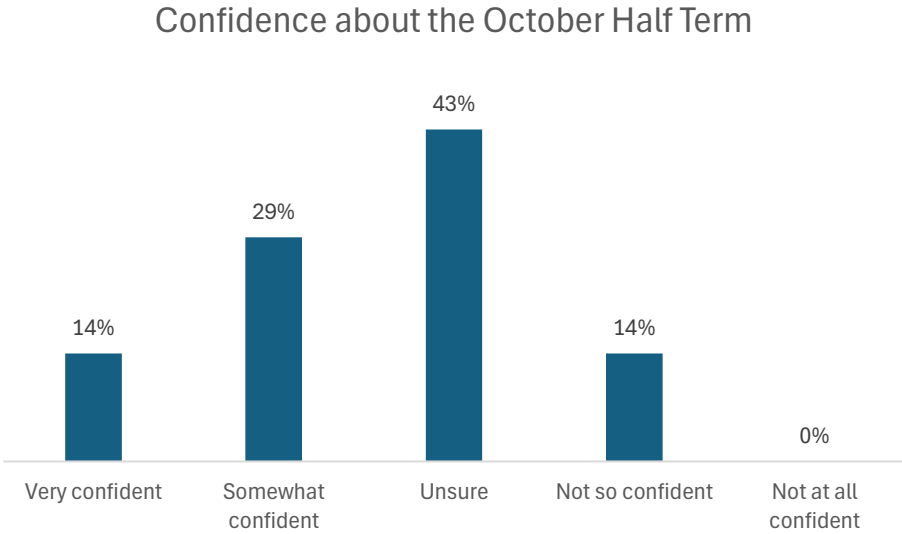
In October, 9% reported bookings up vs 29% in July; 27% said the same; 32% down (up from 21%); and 32% not applicable (vs 29%).

For booking values, 10% were up (vs 15% in July), 29% the same (vs 31%), 28% down (vs 23%), and 33% not applicable (vs 31%).

Confidence for the October Half Term: 14% very confident, 29% somewhat confident, 43% unsure, 14% not so confident, 0% not at all confident. Overall, outlook softened into autumn, with confidence tempered by uncertainty.

Volume of bookings	Up	The same	Down	Not applicable
October 2025	9%	27%	32%	32%
July 2025	29%	21%	21%	29%

Value of bookings	Up	The same	Down	Not applicable
October 2025	10%	29%	28%	33%
July 2025	15%	31%	23%	31%



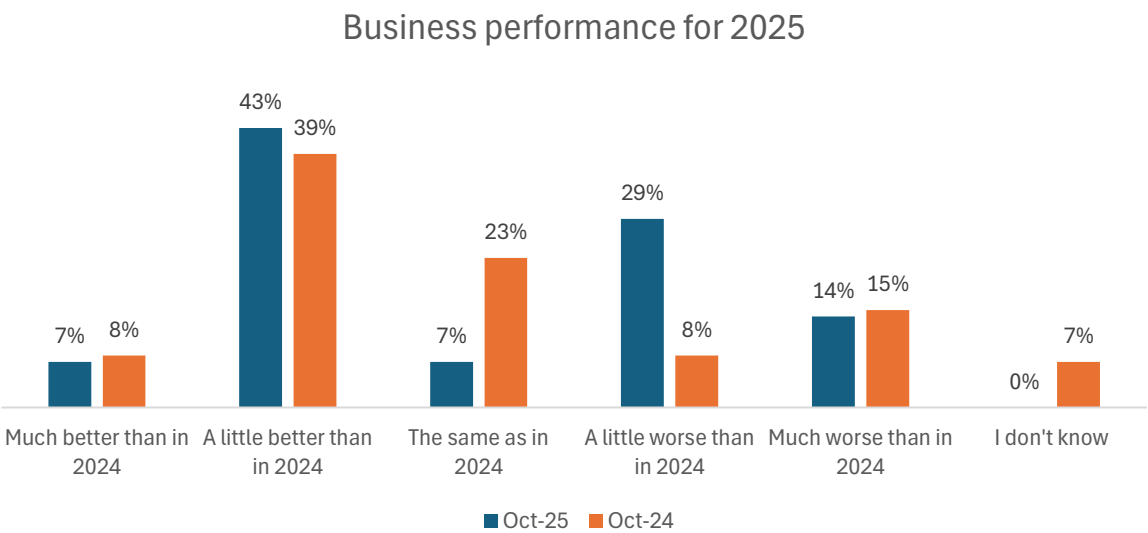
*Q: How do your future bookings for the next six months compare to what you would normally expect at this time of year? (33) Q: How confident do you feel about your business trading over the next weeks, heading towards the start of the summer holiday (33)?*



## Research Outputs – Business forecast

Compared with October 2024, expectations are more dispersed. *A little better than 2024* increased from 39% to 43%. *The same as 2024* decreased from 23% to 7%. *A little worse than 2024* increased from 8% to 29%. *Much better than 2024* edged down from 8% to 7%, while *much worse* dipped from 15% to 14%. *Don't know* fell from 7% to 0%.

Overall, expectations for 2025 are more polarised, with fewer “same/don’t know” responses and higher shares expecting either a little better or a little worse.



Q: And thinking about 2025 overall, do you expect your business performance to be...? (33)?



## Research Outputs – Business operations

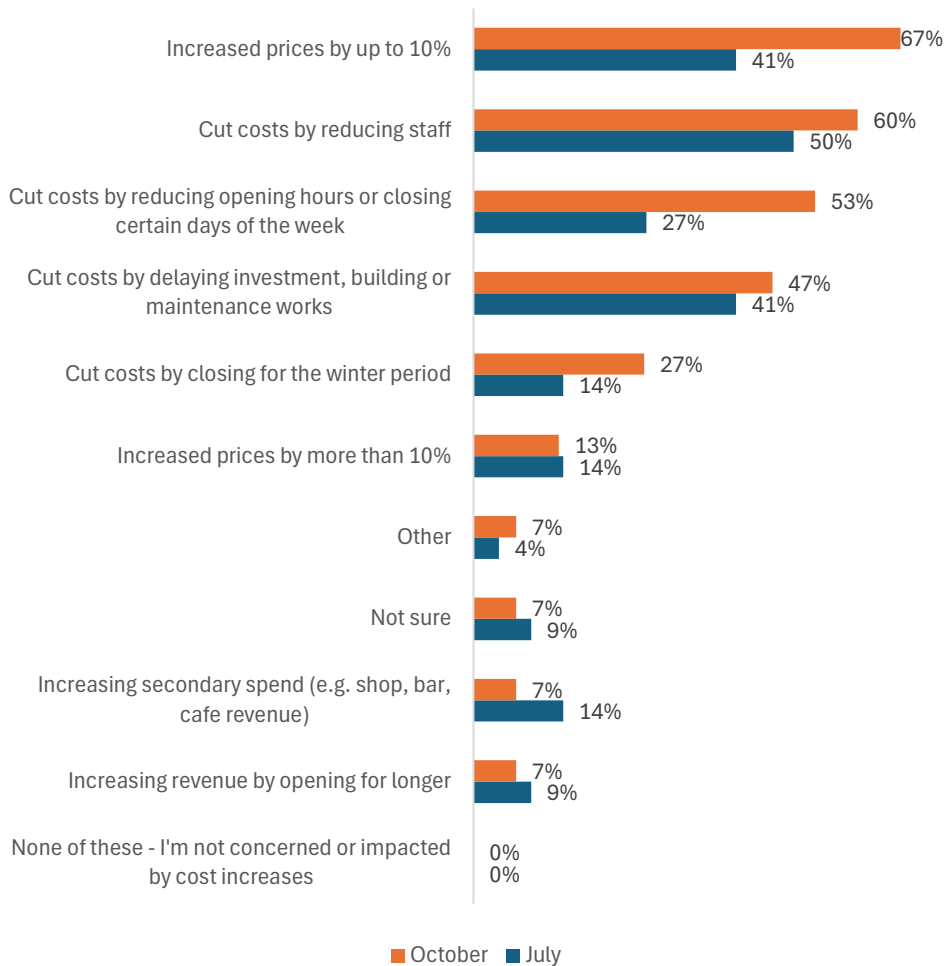
In October, the most common responses to rising costs were increasing prices by up to 10% (67% vs 41% in July) and cutting costs by reducing staff (60% vs 50%).

Operational changes shifted: reducing opening hours or closing certain days fell from 53% in July to 27% in October, while delaying investment and building maintenance rose from 41% to 47%. Closing for the winter period increased from 14% to 27%.

Smaller shares increased prices by more than 10% (13% vs 14%), focused on secondary spend such as shop/bar/café revenue (7% vs 14%), or opened for longer (7% vs 9%). “Other” responses rose from 4% to 7%, and 7% were not sure (vs 9%).

No businesses said they were unaffected by cost increases, as it was the case in the July edition.

Response to increasing costs



Q: How is your business responding to increasing costs? (32)





## Research Outputs – Business operations

Cost pressures remained dominant in October: increasing energy and fuel costs affected 93% (vs 82% in July). Increased staffing costs rose to 64% (vs 59%), while increasing supplier costs fell to 50% (vs 68%). Other supplier issues (delays/stock/unreliability) increased to 14% (vs 5%).

Poor/unpredictable weather rose to 50% (vs 23%), seasonality of the destination to 50% (vs 36%), and the VAT threshold to 43% (vs 23%). The UK economic climate remained high but edged down to 71% (vs 77%).

Competitive pressures shifted. Competition from overseas holidays eased to 29% (vs 32%), and competition from other parts of the UK dropped to 7% (vs 23%). Attracting/retaining customers rose to 14% (vs 5%).

Lack of applicants was unchanged at 14%, while staff absence/health fell to 7% (vs 18%) and high staff turnover to 7% (vs 14%).

Finance and regulation pressures increased: cost/availability of finance rose to 21% (vs 9%) and planning/regulations/compliance to 14% (vs 0%). “None of these” decreased to 0% (vs 5%), indicating pressures are more widespread.

External factors affecting business	October	July
Increasing energy and fuel costs	93%	82%
Poor UK economic climate / less money in consumer's pockets	71%	77%
Increased staffing costs	64%	59%
Increasing supplier costs	50%	68%
Poor / unpredictable weather	50%	23%
Seasonality of the destination	50%	36%
VAT threshold	43%	23%
Competition from overseas holidays	29%	32%
Cost and availability of finance	21%	9%
Attracting and retaining customers	14%	5%
Competition from other local businesses	14%	5%
Lack of applicants to fill staff vacancies	14%	14%
Other supplier issues (delays, lack of stock, unreliability)	14%	5%
Planning, Regulations and compliance	14%	0%
Competition from other parts of the UK	7%	23%
High staff turnover	7%	14%
Staff absence / staff health	7%	18%
Lack of training and business support	0%	0%
None of these	0%	5%
Other	0%	0%



Q: Which of the following external factors, if any, are affecting your business? (32)



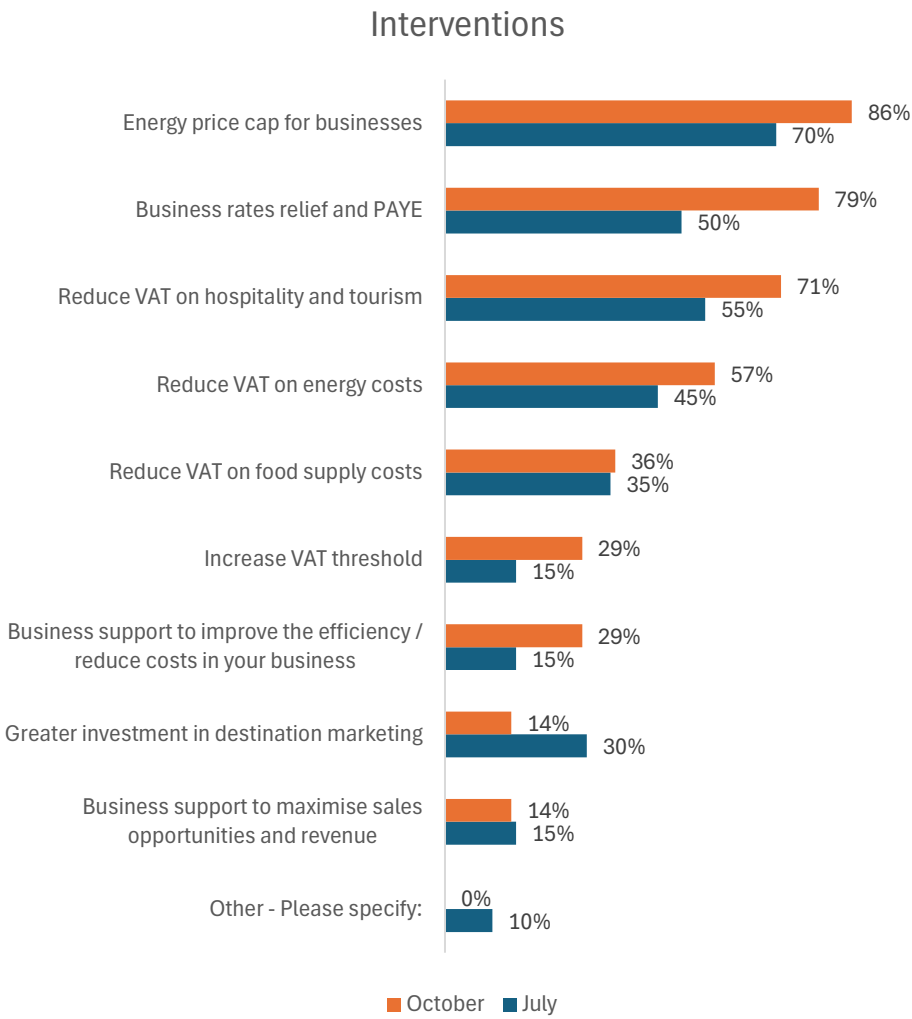
## Research Outputs – Business operations

In October, requests focused on cost relief. The top asks were an energy price cap (86% vs 70% in July) and business rates relief/PAYE (79% vs 50%). Calls to reduce VAT on hospitality and tourism strengthened (71% vs 55%), as did reducing VAT on energy (57% vs 45%).

Increasing the VAT threshold rose to 29% (vs 15%), and support to improve efficiency/reduce costs was also 29% (vs 15%). Reducing VAT on food supply costs was broadly stable (36% vs 35%).

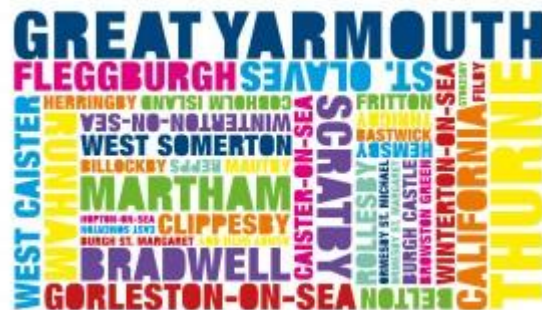
By contrast, greater investment in destination marketing fell to 14% (vs 30%). Support to maximise sales opportunities/revenue was essentially unchanged (14% vs 15%). “Other” interventions declined to 0% (vs 10%).

Overall, businesses prioritised tax and cost-focused measures in October, while marketing and broader support moved down the list.



Q: And which of the following interventions would you most like to see to help your business? (31)





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