



# Business Barometer Survey 2015

**Key Findings**  
November 15



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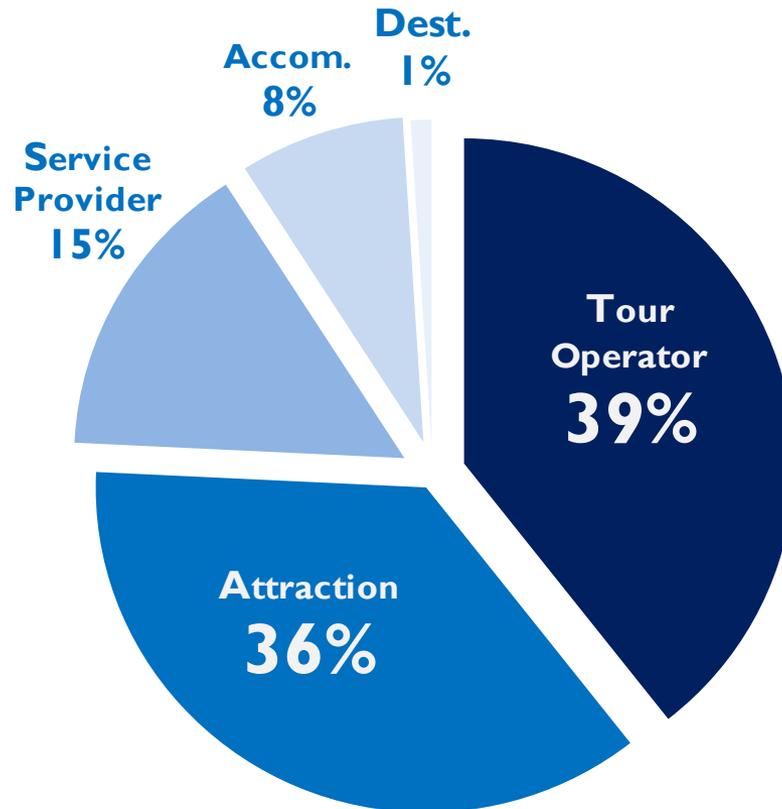


# Aims & method

- **Business barometer survey of members**
- **The aims of the barometer are to:**
  - **Understand how different sectors of the membership are performing**
  - **Determine the level of business being generated by our membership**
  - **Inform lobbying and PR activity**
  - **Allow UKinbound to react to industry developments more quickly, by gathering feedback on current issues impacting the tourism industry**
- **Online survey sent out to members during November 2015**
- **74 completed questionnaires – 22% of members**
- **Many thanks for taking part!**



# Varied mix of sectors took part



Sample broadly reflective of membership breakdown.

**Note:** Only one destination took part in the survey so caution should be taken when viewing data from this sector



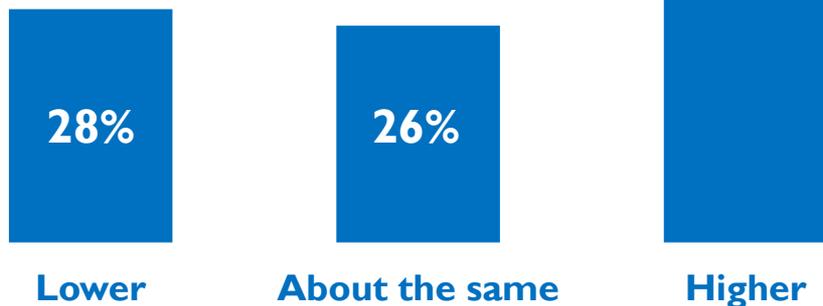
Q1. Which membership category do you fall into? Base: 74

Results

# Bookings / visitor numbers in September & October increased for just under half of members compared to previous year

For those who selected higher, on average, bookings / visitor numbers increased by

**23%**



For those who selected lower, on average, bookings / visitor numbers decreased by

**14%**

Increase most prominent amongst Service Providers (55%) and Tour Operators (52%) with over half stating 'higher'

Over one third of Attractions (37%) and Service Providers (36%) stated 'lower'

# Why did your bookings / visitor numbers increase?

“Targeted the Rugby World Cup market with targeted social media adverts, and an advance promotion to overseas rugby fans.” **Attraction**

“The right products in the international market and these are starting to sell well.”  
**Service Provider**

“Increased marketing activity, better market penetration in certain source markets.”  
**Accommodation Provider**

“China performed well and USA also.” **Tour Operator**

“Rugby World Cup and various conferences.”  
**Destination**

# Why did your bookings / visitor numbers *decrease*?

*“High exchange rate.”*  
**Tour Operator**

*“London accommodation too expensive.”*  
**Attraction**

*“Visitors spending less on 'extras' so either choosing cheaper tickets or not buying at all.”*  
**Service Provider**



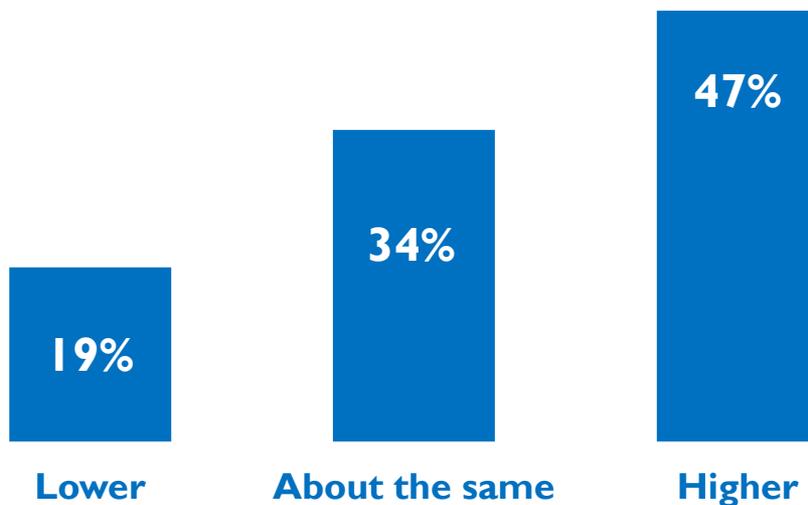
*“We were unable to get bedrooms for September and October for a reasonable price due to Rugby World Cup.”*  
**Tour Operator**

*“Mainly due to drop off in European tourists on budget breaks.”*  
**Attraction**

# Revenue yield in September & October 15 increased for just under half of members compared to 2014

For those who selected higher, on average,  
revenue yield increased by

**16%**



For those who selected lower, on average,  
revenue yield decreased by

**15%**

Increase most prominent amongst Attractions (52%)

Decrease most prominent amongst Service Providers (27%)



Q3. Compared with September and October in 2014, was your revenue yield for the same period in 2015: higher, about the same or lower? Base: 74



# China & USA remain key growth markets during September & October

18%



China

14%



USA

24%

had not experienced growth from any overseas markets

Q4. Please select the main market that you are currently experiencing growth in. Base: 74

# France most frequently cited as declining

12%

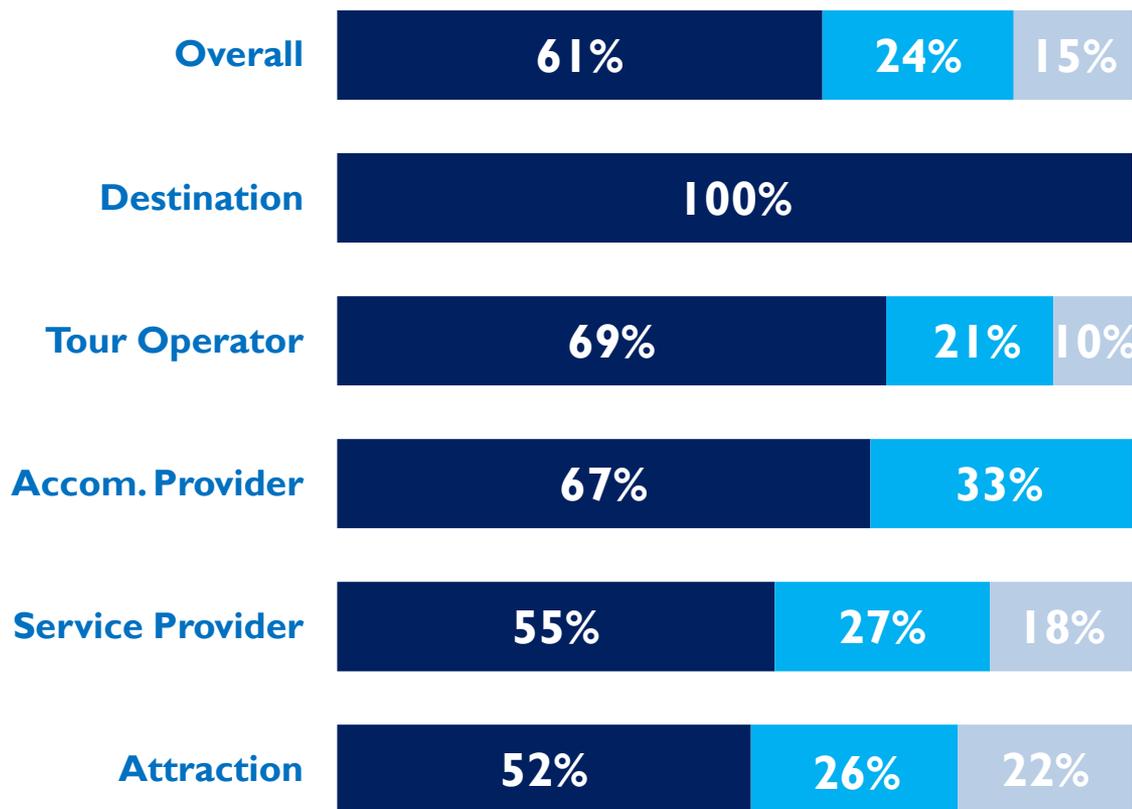


France

45%

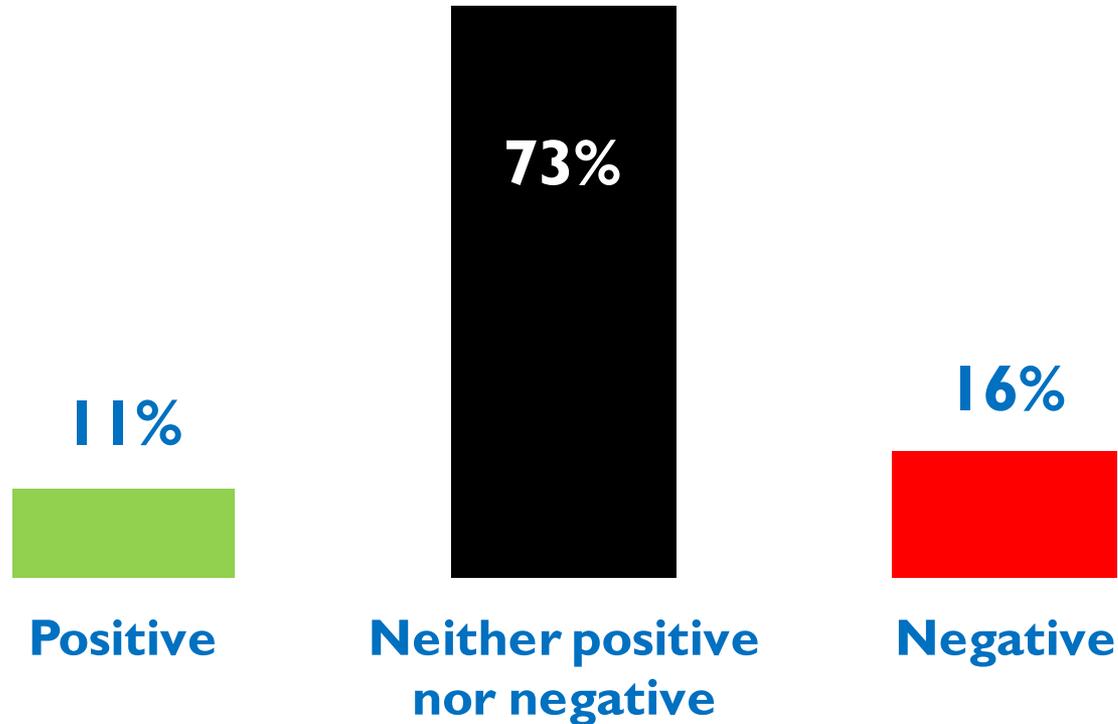
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experienced  
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# Confidence levels remain steady rather than strong regarding expected bookings / visitor revenues over next 12 months

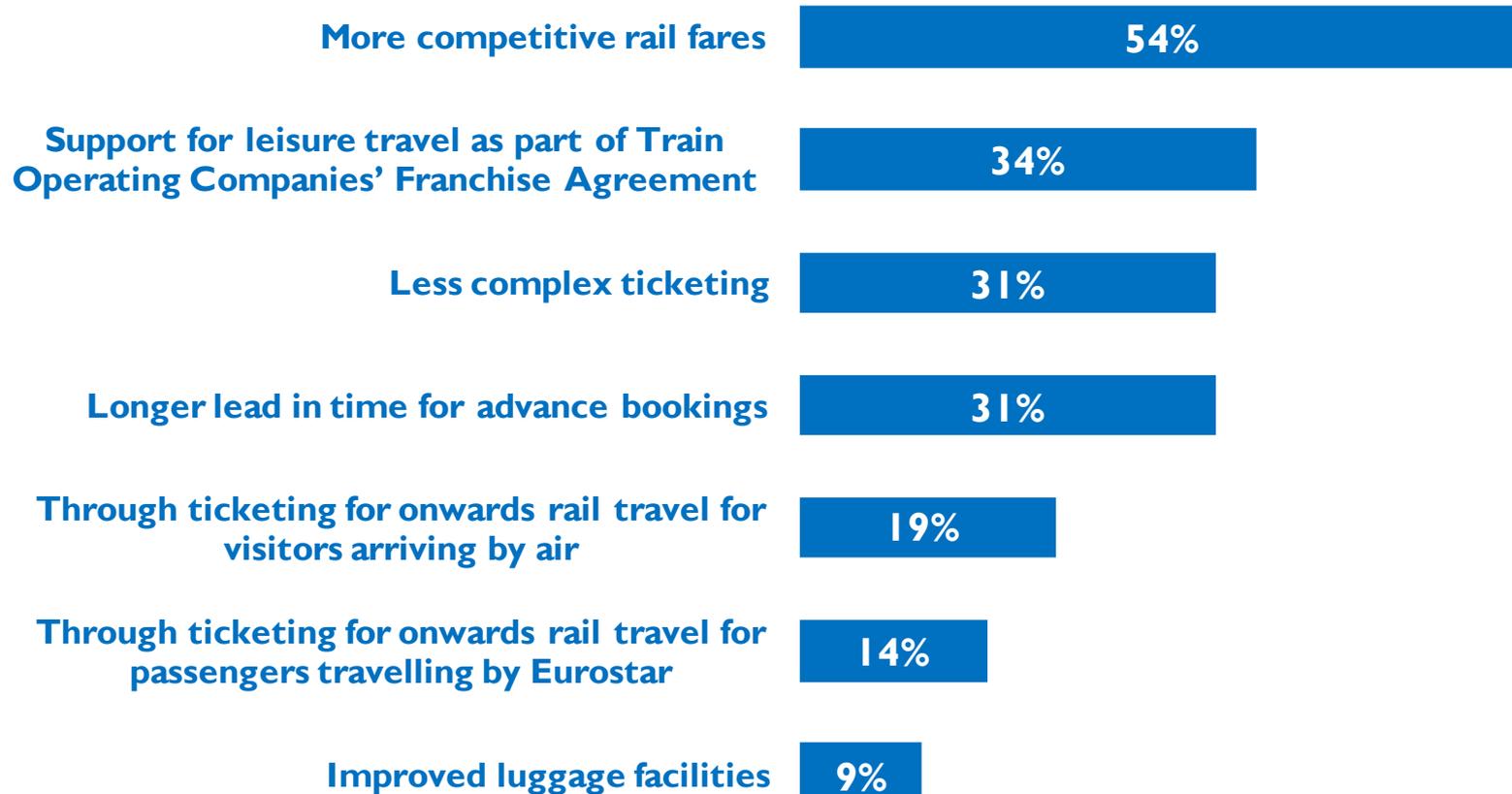


■ Confident ■ Neither confident nor unconfident ■ Unconfident

# Majority of members show no real concern over potential impact of National Living Wage



# More competitive rail fares seen as key to encourage international visitors to travel outside London



## Contact ...

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