Business Barometer Survey 2015

Key Findings

March 15

Mill House
North Street
York , YO1 6JD
Tel: 01904 632039

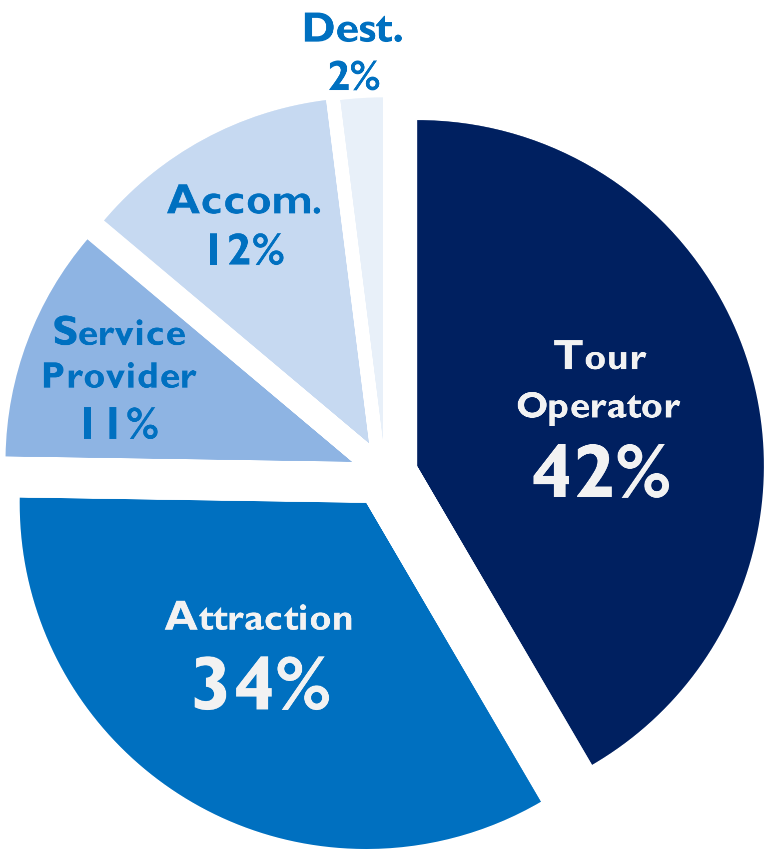
Dephna House
24-26 Arcadia Ave
London, N3 2JU
Tel: 0208 819 1397

Aims & method

- **Business barometer survey of members**
- **Reinstated on a bi monthly basis 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 March 2015**
- **65 completed questionnaires – 21% of members**
- **Many thanks for taking part!**

Varied mix of sectors took part

Sample reflective of membership breakdown.



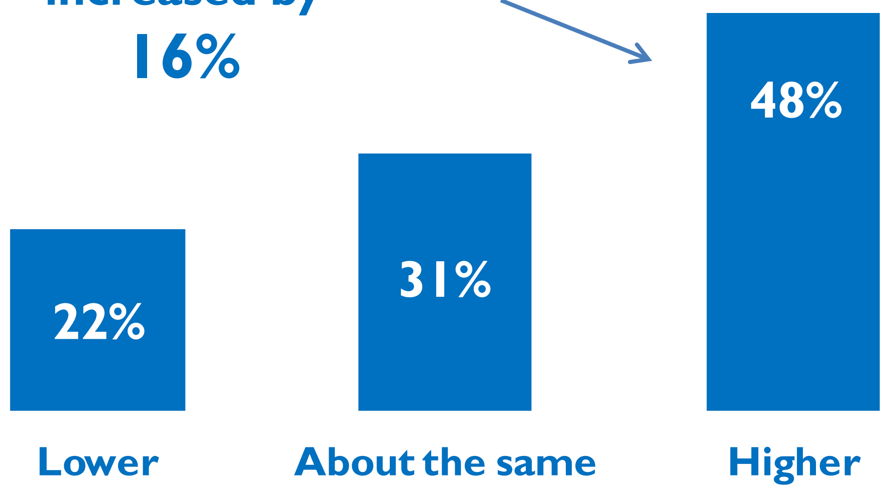
Q1. Which membership category do you fall into? Base: 65


Results

Bookings / visitor numbers up in Jan & Feb 15 compared to previous year

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

16%



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

22%

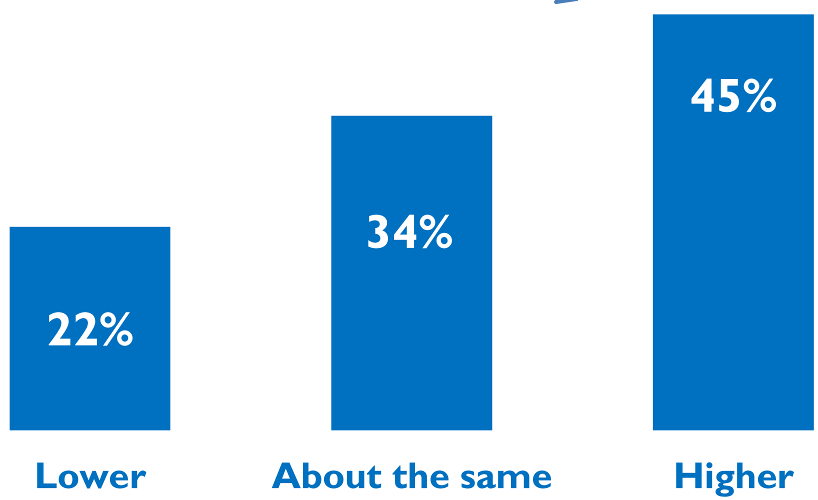
Increase most prominent amongst Accom. Providers, Service Providers and Destinations

Three quarters of Tour Operators stated 'about the same' (37%) or 'lower' (41%)

Q2. Compared with January and February in 2014 were your bookings / visitor numbers for the same period: higher, about the same or lower? Base: 65

Revenue yield up in Jan & Feb 15 compared to previous year

For those who selected higher, on average, revenue yield increased by 13%



For those who selected lower, on average, revenue yield decreased by 19%

Again, increase most prominent amongst Accom. Providers, Service Providers and Destinations

Decrease more likely to be Tour Operators

Q3. Compared with January and February in 2014, was your revenue yield for the same period: higher, about the same or lower? Base: 65

Main markets growing in Jan & Feb 15

25%

France

USA

22%

China

20%

Germany

37%

had not experienced growth from any overseas markets

Q4. Please rank the top three markets that you have experienced growth from in January and February 2015. Base: 65

Main markets declining in Jan & Feb 15

12%

Italy

Russia

Spain

11%

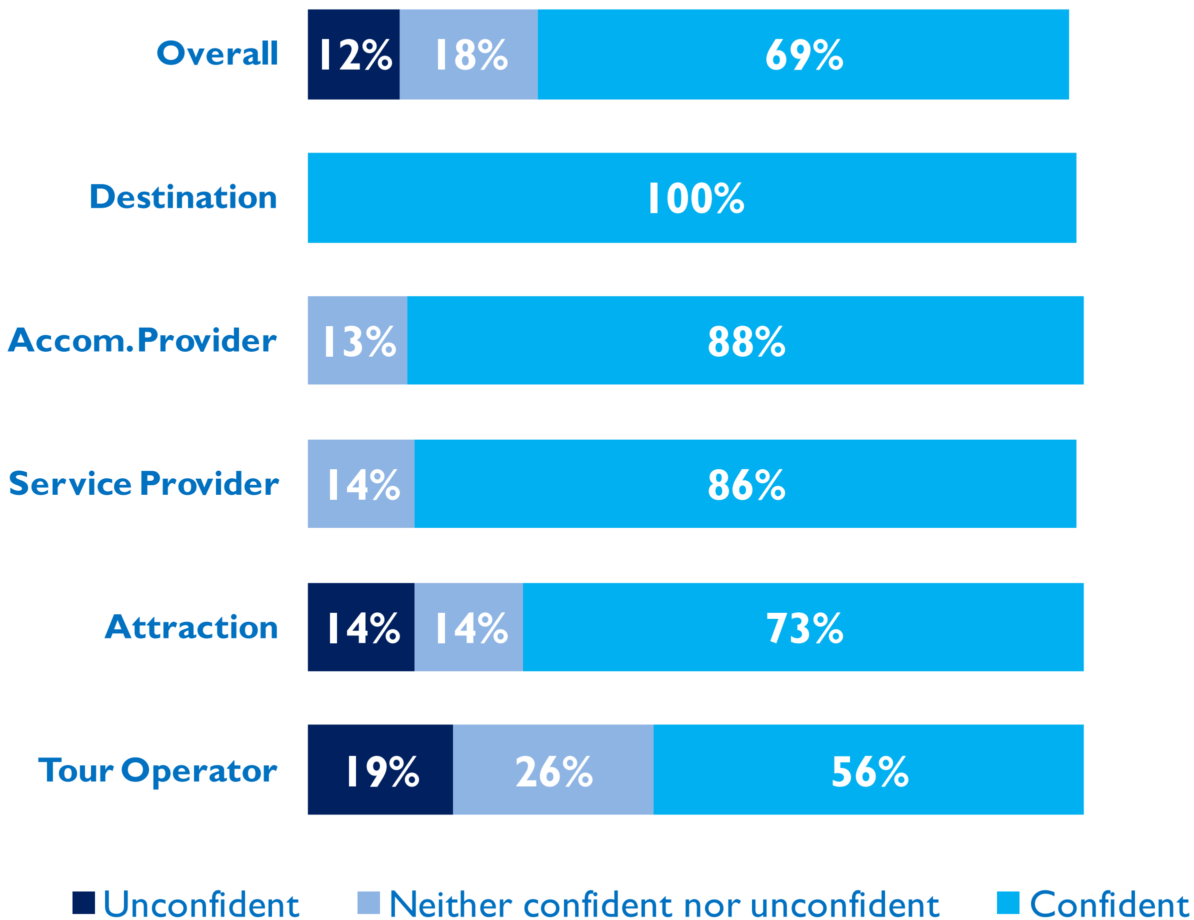
France

52%

had not experienced decline from any overseas markets

Q5. Please rank the top three markets that you have experienced decline from in January and February 2015. Base: 65

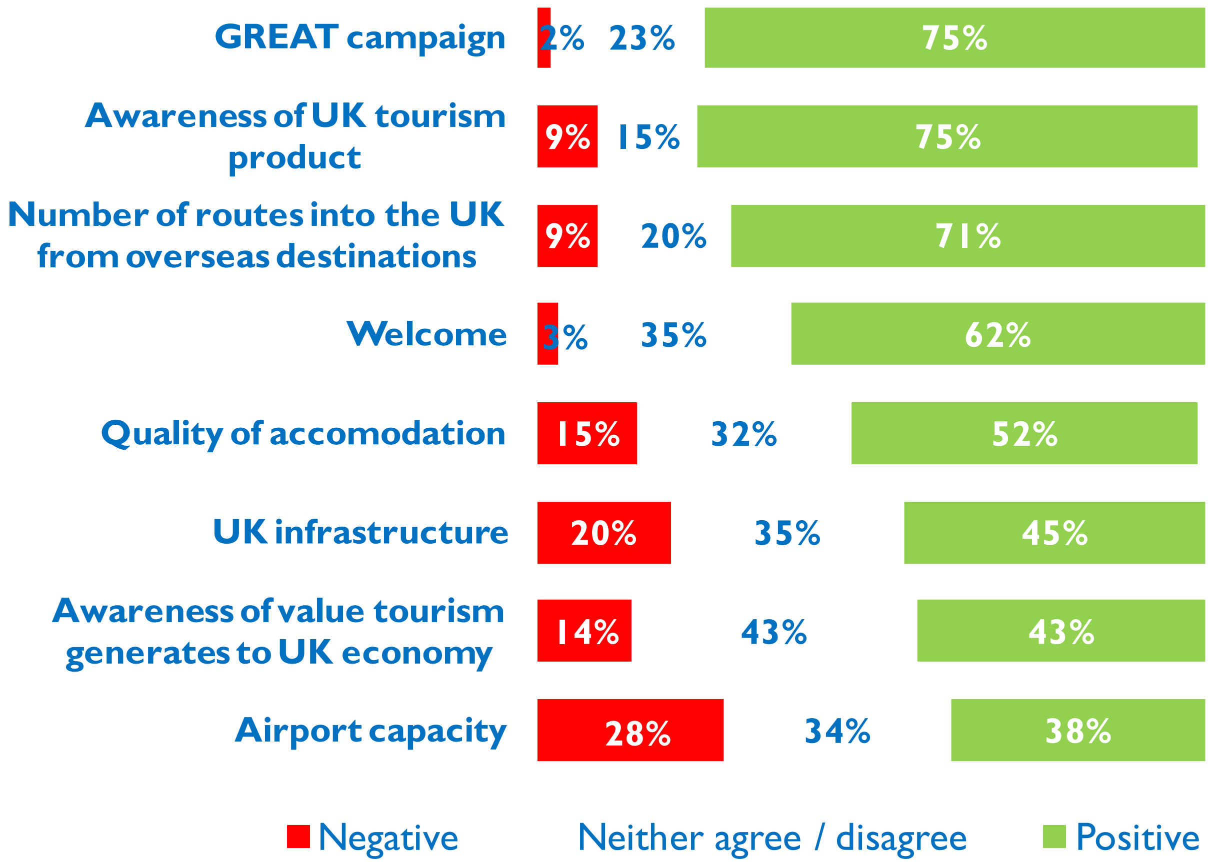
High confidence levels about bookings / visitor revenues over next 12 months



Q6. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues? Base: 65

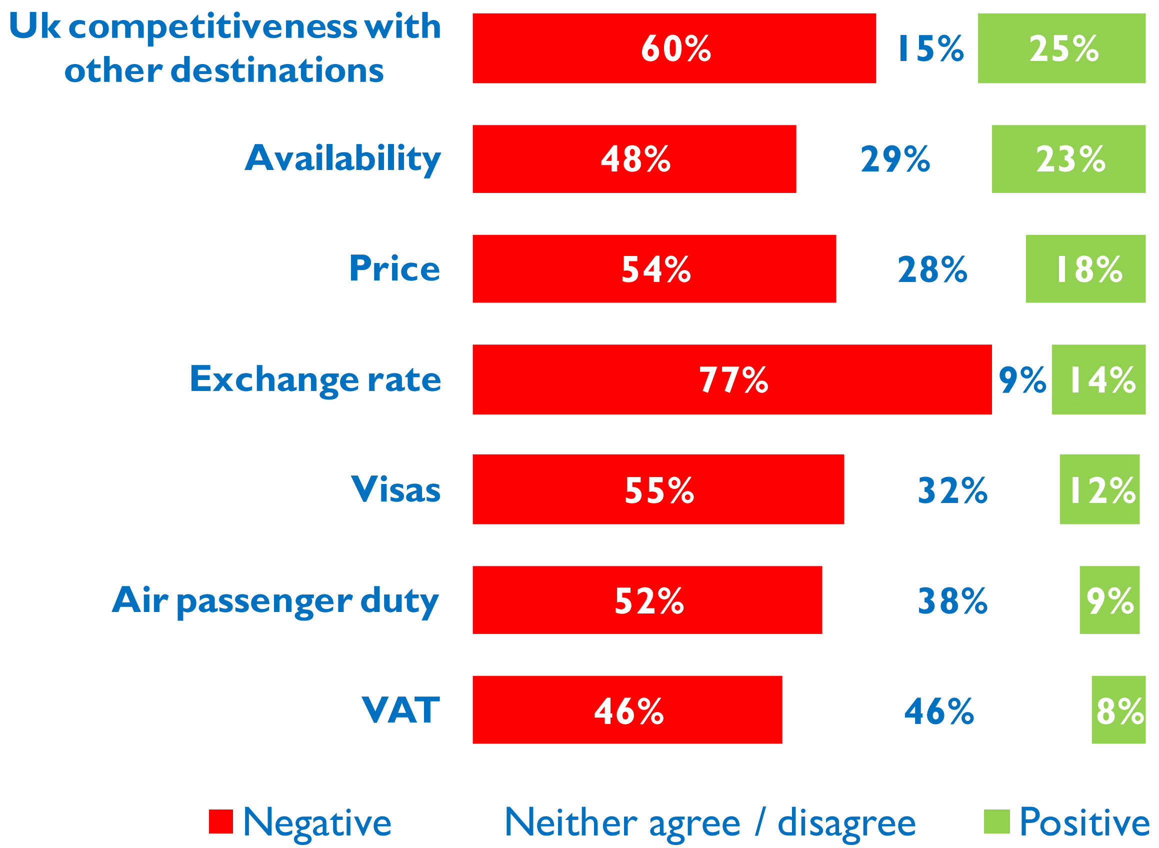
Mixture of positivity & negativity towards factors impacting future bookings / visitor revenues

Factors likely to impact future bookings / revenues



Q7. Which off the following factors are likely to impact future bookings / visitor revenues in either a positive or negative way over the next 12 months? Base: 65

Mixture of positivity and negativity towards factors impacting future bookings / visitor revenues



Q7. Which of the following factors are likely to impact future bookings / visitor revenues in either a positive or negative way over the next 12 months? Base: 65

What single most important initiative could the newly elected UK government implement to stimulate inbound tourism to the UK?

“Cut VAT on tourism products to make the UK more competitive with it’s cheaper European rivals”

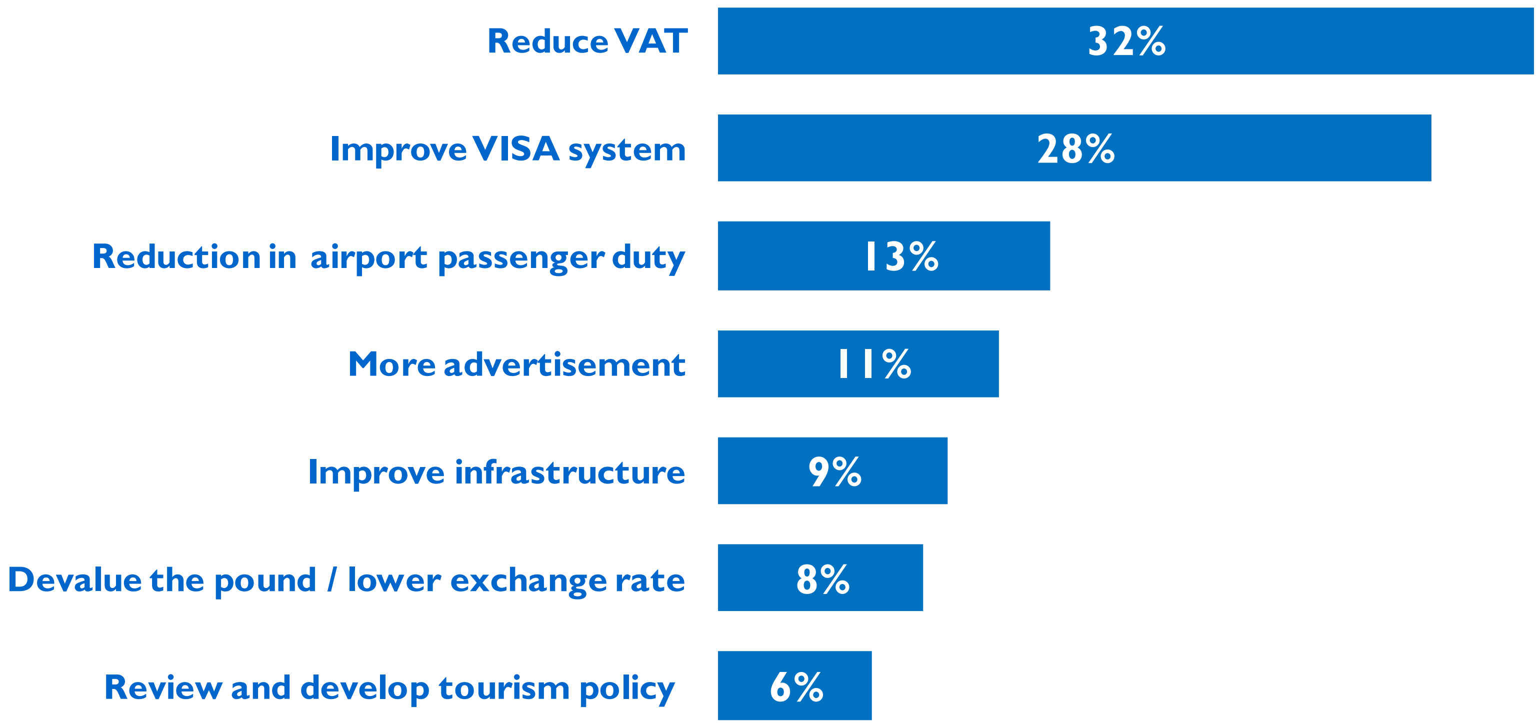
“Easy and simple visa application process”

“Reducing further the airport passenger duty”

“Recognise and promote the value of the tourism industry to the UK economy”

Q8. What single most important initiative could the newly elected UK government implement to stimulate inbound tourism to the UK? Base: 65

Reducing VAT & improving VISA system are clear priorities for members



UKinbound

Q8. What single most important initiative could the newly elected UK government implement to stimulate inbound tourism to the UK? Base: 65

Contact ...

Richard Bryan or Tom Ratcliffe

richard.bryan@qaresearch.co.uk

tom.ratcliffe@qaresearch.co.uk

01904 632039

www.qaresearch.co.uk