



Business Barometer Survey 2016

Key Findings

March 16



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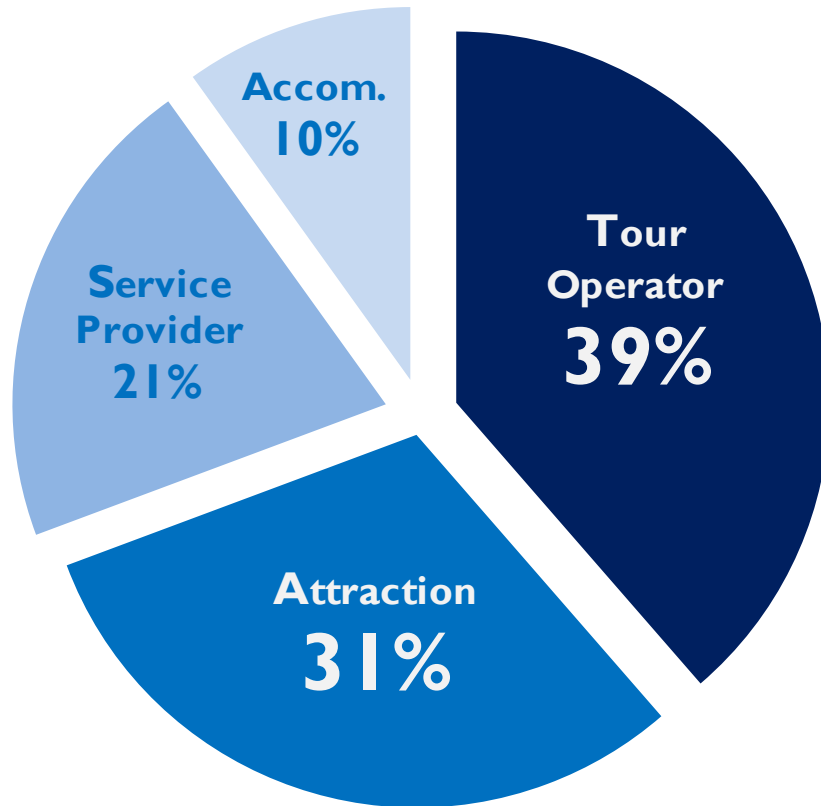


Aims & method

- **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 March 2016**
- **62 completed questionnaires – 18% of members**
- **Many thanks for taking part!**



Varied mix of sectors took part



Sample broadly reflective of membership breakdown.

Note: No destinations took part in the survey



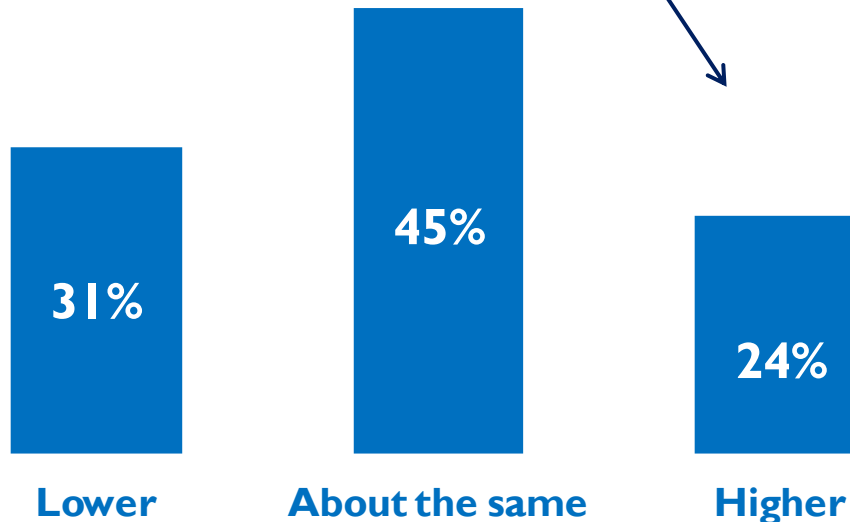
Q1. Which membership category do you fall into? Base: 62

Results

Bookings / visitor numbers in Jan & Feb 16 increased for just under a quarter compared to 2015

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

33%



Increase most prominent amongst attractions (37%)

Half of accommodation providers (50%) stated 'lower'

For those who selected lower, on average, bookings / visitor numbers decreased by **16%**

Why did your bookings / visitor numbers increase?

“Appears to be a recovery following a slow down in Nov-Jan”
Attraction

“Increased number of partners from a wider range of markets”
Service Provider

“Investment in new facilities”
Attraction



“Kept prices the same. New partnerships working together”
Tour Operator

“USA very strong over winter”
Attraction

Why did your bookings / visitor numbers *decrease*?

“Uncertainty of UK in/out EU”
Tour Operator

“Paris attacks & migration making Europe unattractive to our market.”
Tour Operator

“Very few leisure tourists in London and barely any school groups”
Service Provider

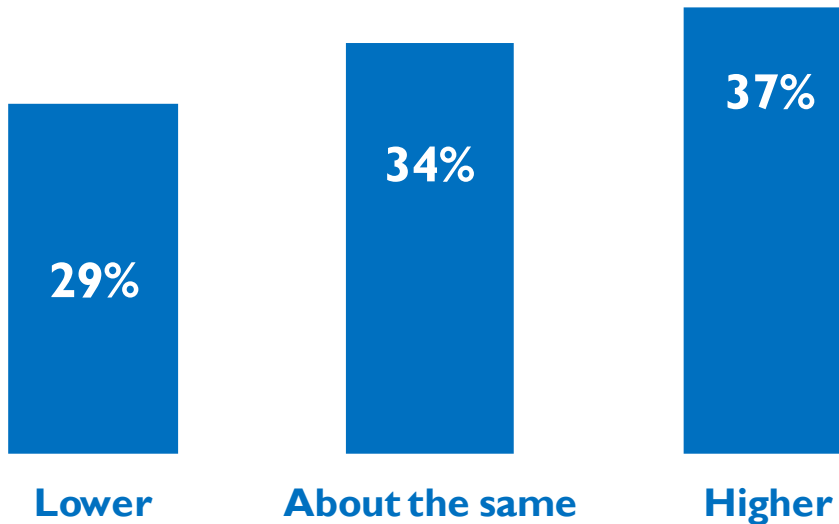
“Acts of terrorism in Europe, strong pound against the Euro”
Attraction

“Poor weather including snow”
Attraction

Revenue yield in Jan & Feb 16 increased for just over two-thirds of members compared to 2015

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

21%



Increase most prominent amongst Attractions (63%)

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

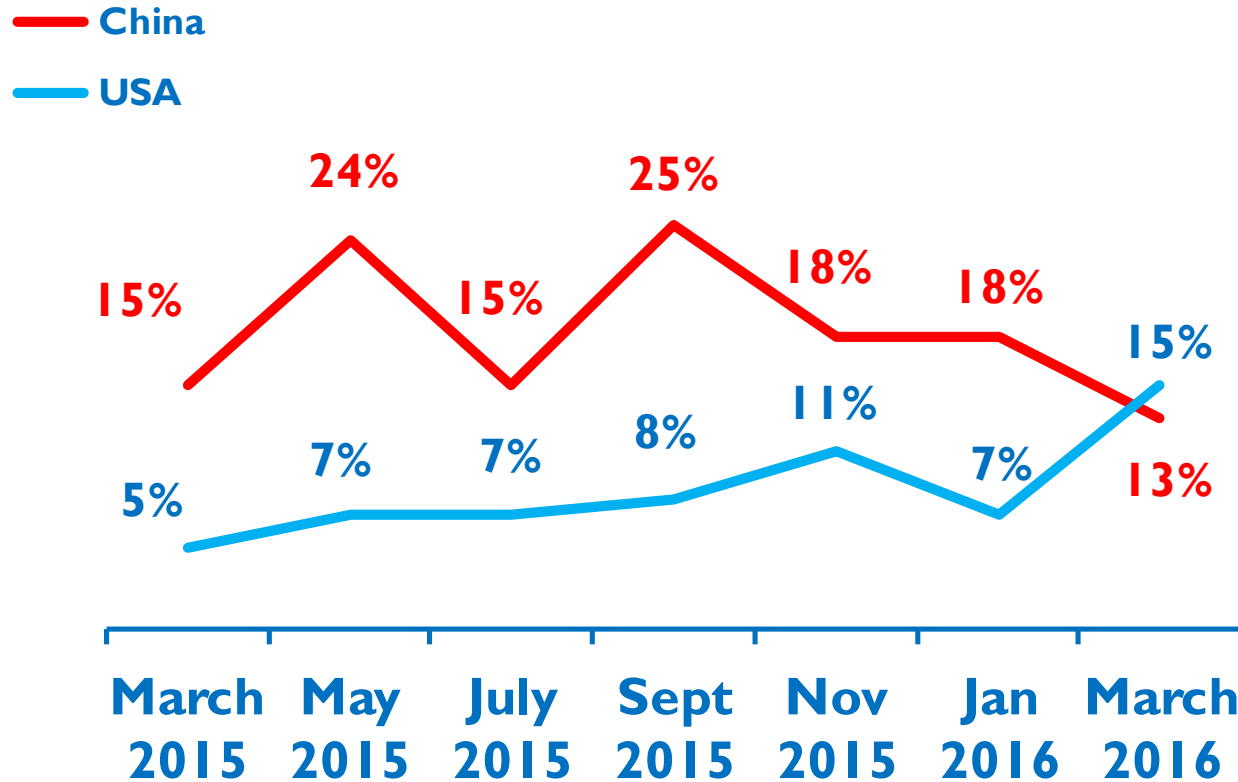
19%



Q3. Compared with January and February in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 62



USA overtakes China as current key growth market

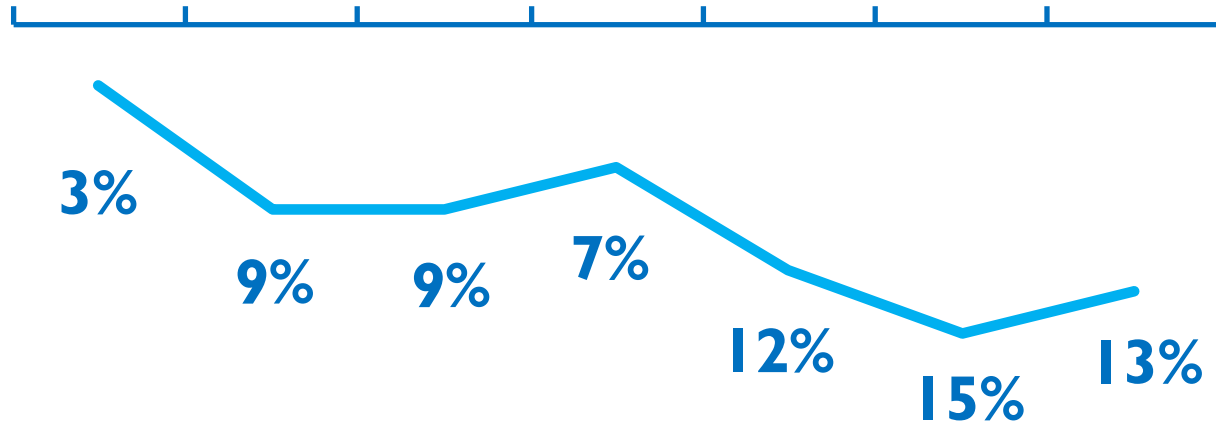


32%
currently not
experiencing
growth from any
overseas markets



France still continues to be main declining market

March 2015 May 2015 July 2015 Sept 2015 Nov 2015 Jan 2016 March 2016

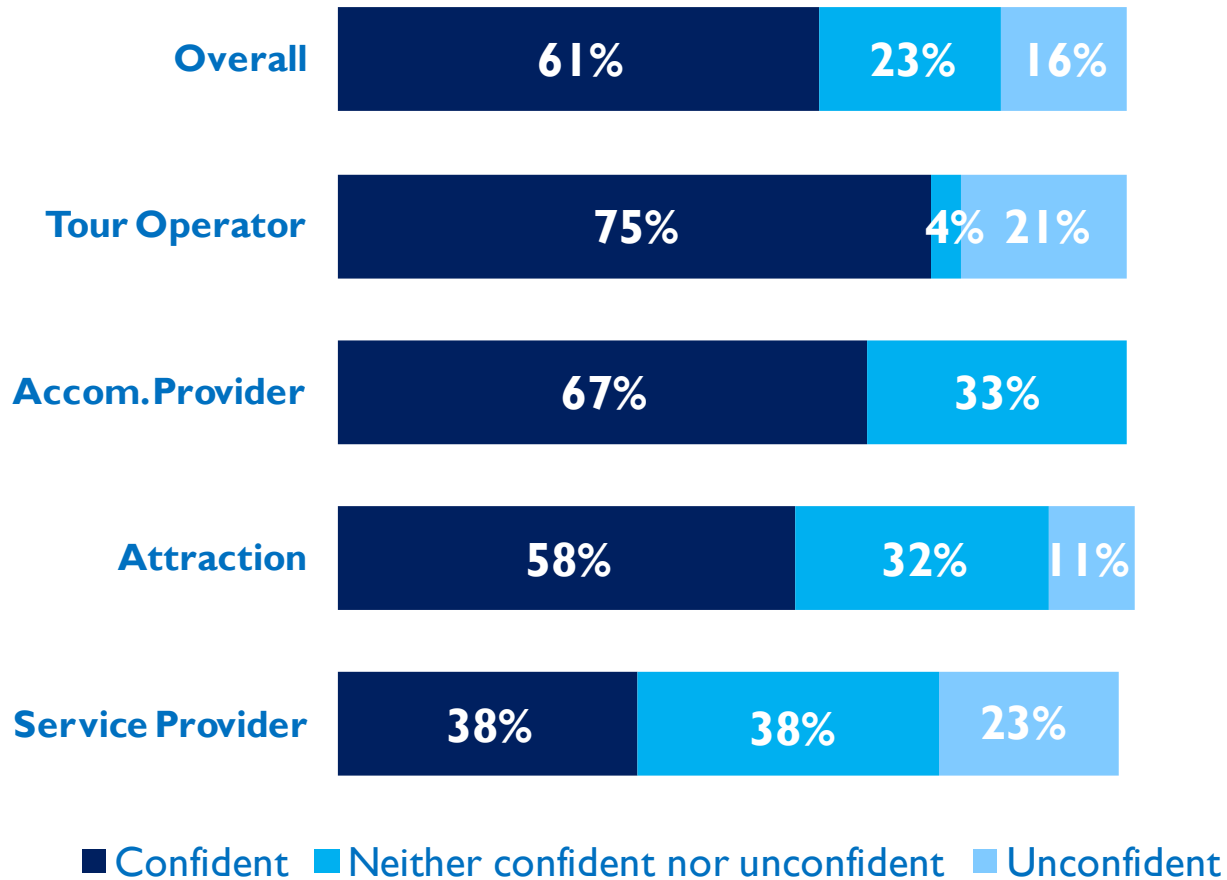


35%
currently not
experiencing
decline from any
overseas markets

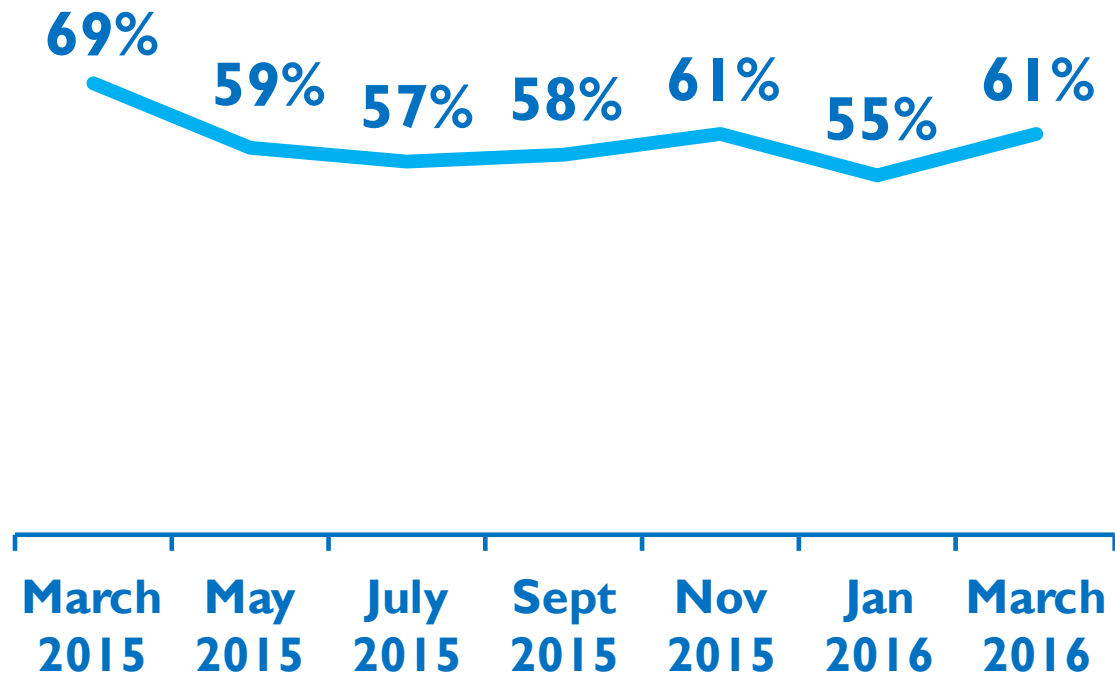


Q5. Please select the main market that you are currently experiencing decline in. Base: 62

Confidence levels are highest amongst Tour Operators regarding bookings / visitor revenues over next 12 months



Confidence levels showing an increase but down on March 15 regarding bookings / visitor revenues over next 12 months



**On average, nearly half (46%)
of members' inbound
business comes from
EU markets**



On average, 27% of members' workforce is made up of EU migrants



UK Border

UK Border

UK Border

UK Border

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