



Business Barometer Survey 2015

Key Findings

September 15



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

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

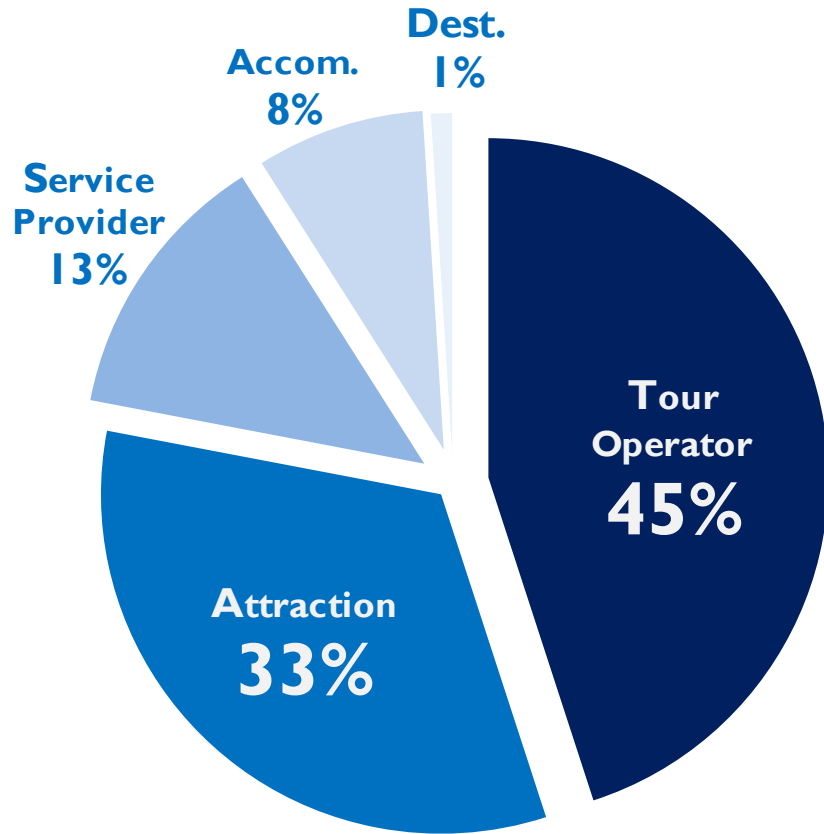


Aims & method

- **Business barometer survey of members**
- **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 September 2015**
- **85 completed questionnaires – 25% 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



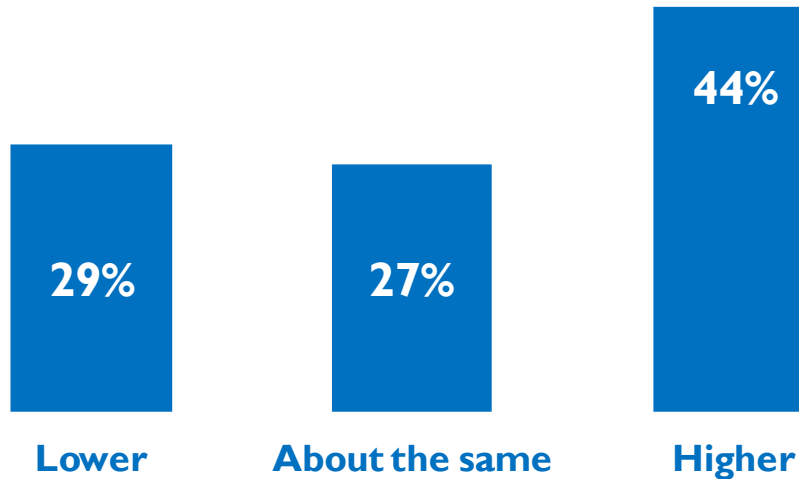
Q1. Which membership category do you fall into? Base: 85

Results

Bookings / visitor numbers in July & August increased compared to previous year

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

25%



Over half (58%) of Tour Operators stated 'higher'

Decrease most prominent amongst Attractions with over half (54%) stating 'lower'

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

11%

Q2. Compared with July and August in 2014 were your bookings / visitor numbers for the same period in 2015: higher, about the same or lower? Base: 85

Why did your bookings / visitor numbers increase?

“Change of season for certain markets, impact of Rugby in September...”
Accommodation Provider

“Building relationships and partnerships, introducing new products and experiences”
Attraction

“Increased promotion and PR activity.”
Service Provider



“Strong business from Europe and China.”
Tour Operator

“Cheaper prices offered to agents”
Tour Operator

Why did your bookings / visitor numbers *decrease*?

"...UK too expensive"
Tour Operator

"Calais problems/Operation Stack/Euro."
Attraction

"Scandinavian, European markets affected. Seem to be lower numbers in London. Domestic market also affected, less Staycation."
Service Provider



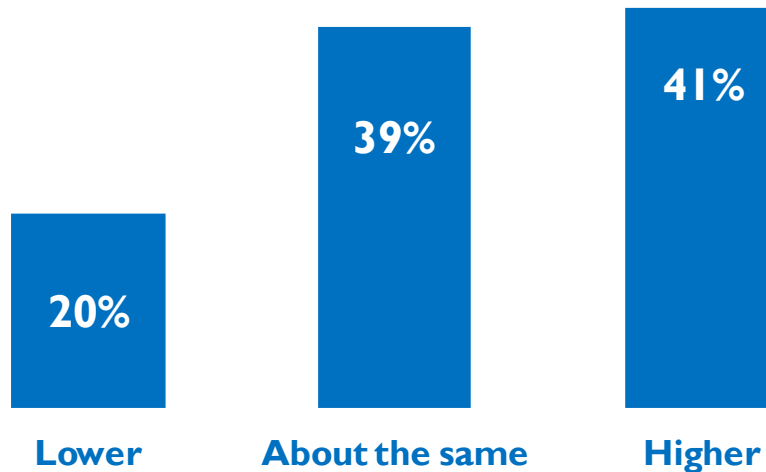
"Strong GBP meant cancelled bookings or greatly reduced groups."
Tour Operator

"Negative Economic challenges in Japan"
Tour Operator

Revenue yield in July & August 15 increased for over two fifths of members compared to previous year

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

23%



Increase most prominent amongst Accommodation Providers (71%)

Decrease most prominent amongst Service Providers (36%)

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

13%



Q3. Compared with July and August in 2014, was your revenue yield for the same period in 2015: higher, about the same or lower? Base: 85



China & USA remain key growth markets during July & August

25%



China

14%



USA

22%

had not experienced growth from any overseas markets

Q4. Please select the main market that you have experienced growth in July and August 2015. Base: 85

Japan & France most frequently cited as declining

8%



Japan

7%



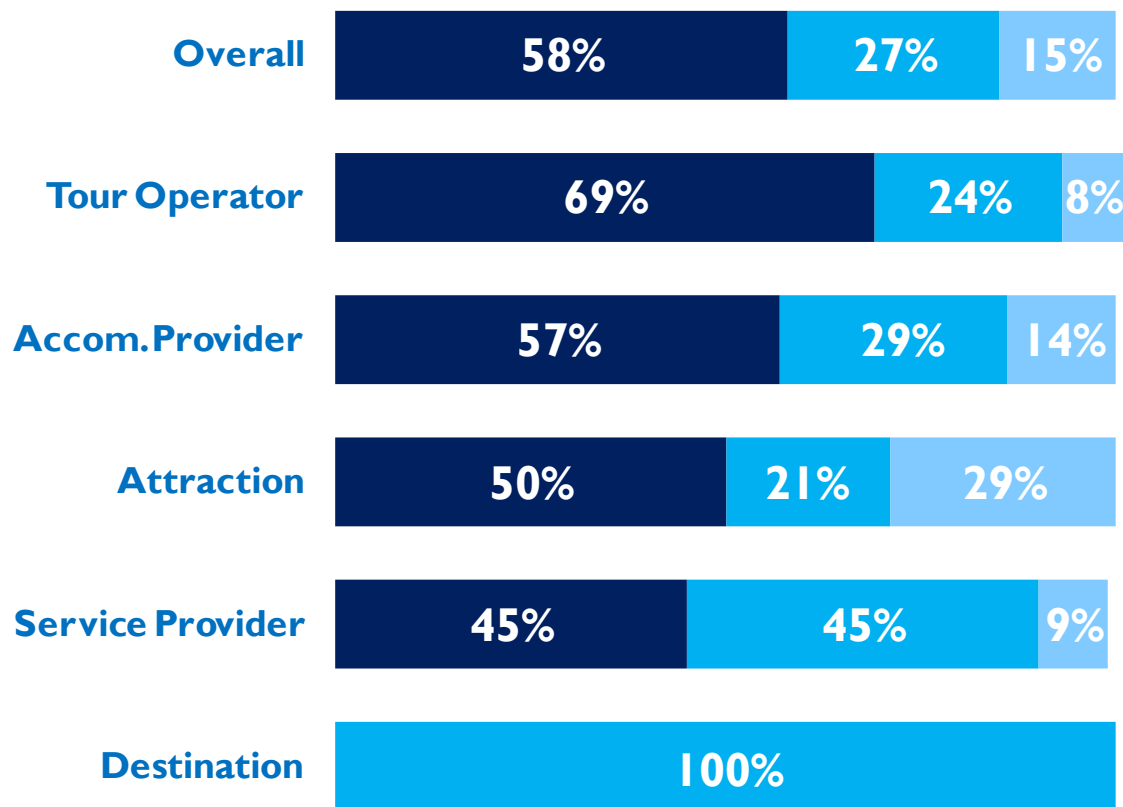
France

34%

had not
experienced
decline from
any overseas
markets

Q5. Please select the main market that you have experienced decline in July and August
2015. Base: 85

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

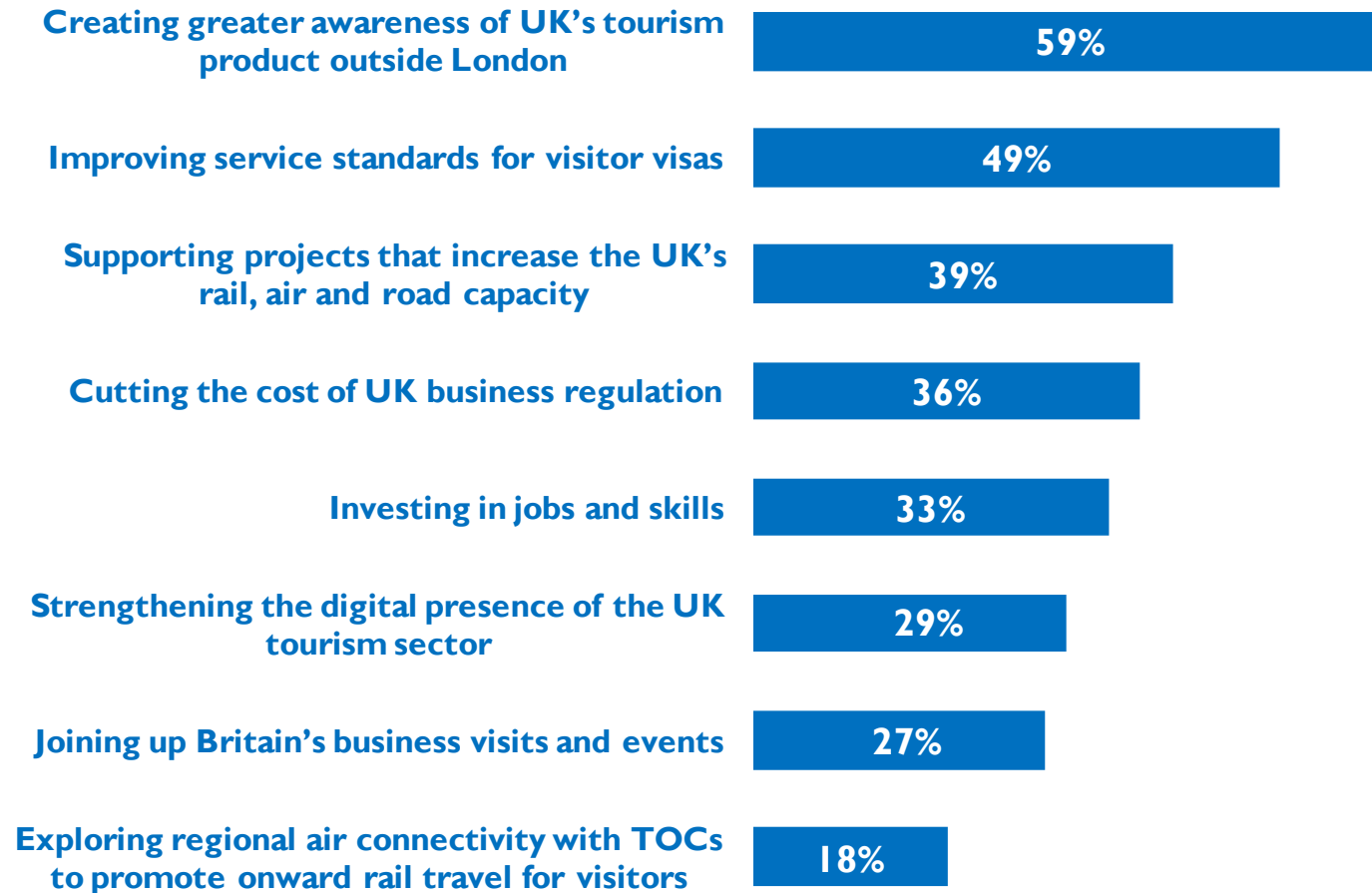


■ Confident ■ Neither confident nor unconfident ■ Unconfident

Q6. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues? Base: 85

80% of members said
support from local or regional
tourists boards was important
or very important.

Creating awareness of UK's tourism product outside London seen as key Government priority for members



Contact ...

Richard Bryan or Tom Ratcliffe

richard.bryan@qaresearch.co.uk

tom.ratcliffe@qaresearch.co.uk

01904 632039

www.qaresearch.co.uk

