



Business Barometer Survey 2016

Key Findings
September 16



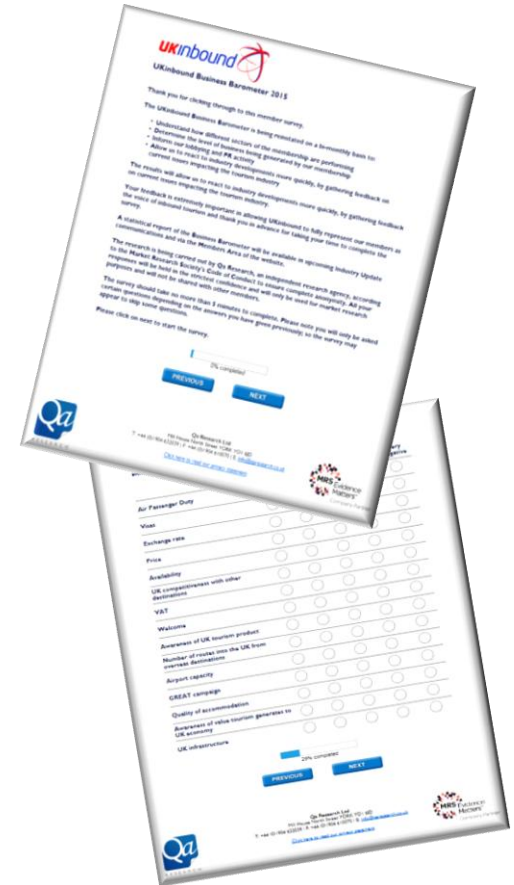
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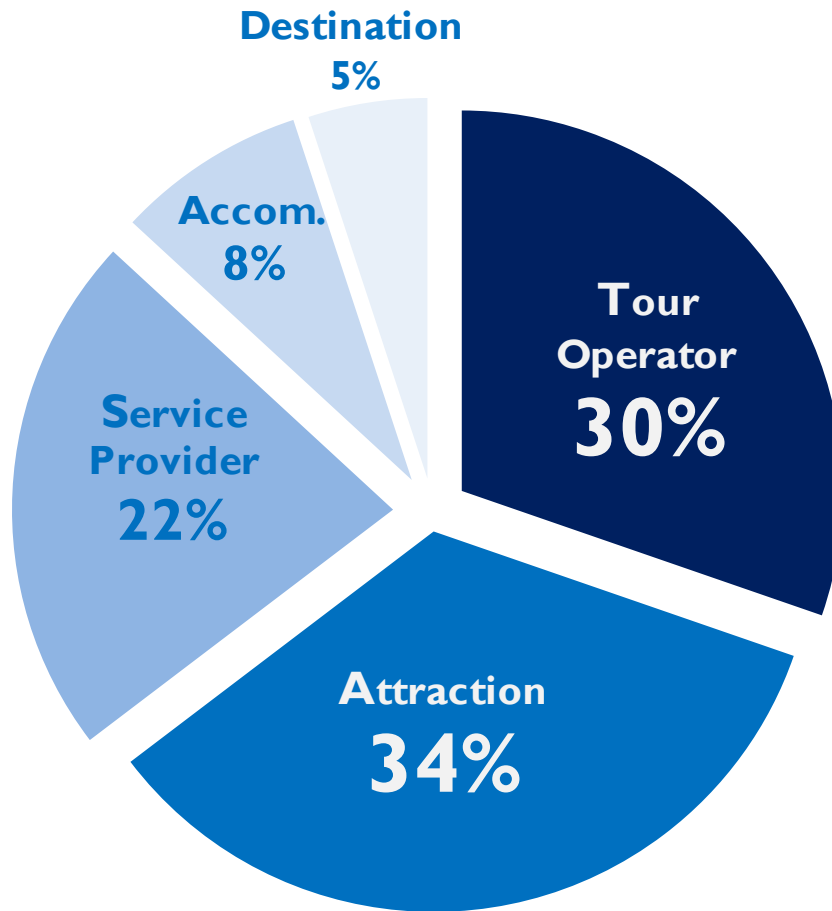


Aims & method

- **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 September 2016**
- **73 completed questionnaires – 20% of members**
- **Many thanks for taking part!**



Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



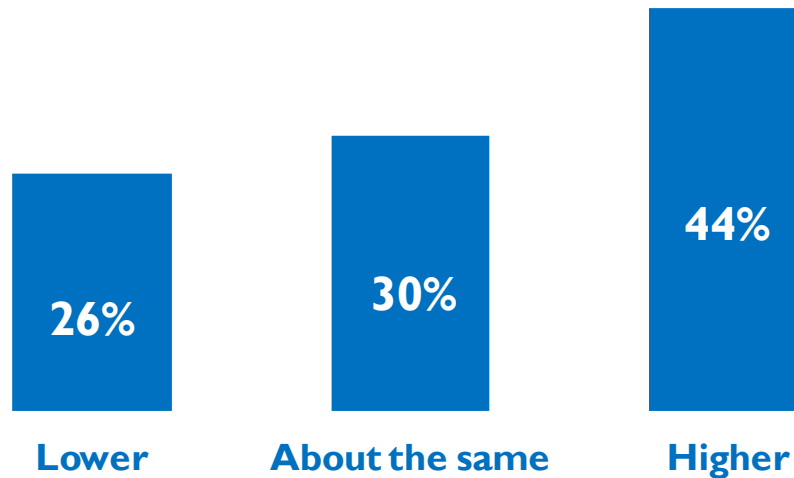
Q1. Which membership category do you fall into? Base: 73

Results

Bookings / visitor numbers in July & August 16 are higher for nearly half of members compared to 2015

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%



Q2. Compared with July and August in 2015 were your bookings / visitor numbers for the same period in 2016: higher, about the same or lower? Base: 73



Why did your bookings / visitor numbers increase?

“Weakness of £..”
Destination

*“Established strong
partnership in target market.”*
Tour Operator

*“Increased demand from
European markets, Spain & Italy.”*
Accommodation provider



*“Better product offering,
favourable exchange rate.”*
Service Provider

*“Better weather, particularly on weekends
& greater brand awareness.”*
Attraction

Why did your bookings / visitor numbers *decrease*?

“Decline in appeal of London to domestic & overseas markets. Main reason security within large cities & cost.”

Attraction

“Terrorism, high pound, Brexit (ill feeling).”

Tour Operator

“A definite decline since Paris & Brussels bombings, then Brexit.”

Service Provider



“Visitor numbers from France, Belgium & Japan continue to disappoint.”

Attraction

“Drop in numbers on tours. Groups previous years 35 - 45 per coach running...this year 15 -25 per coach.”

Tour Operator

Revenue yield in July & August 16 increased for over half of members compared to 2015

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

16%



Lower

About the same

Higher

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

16%

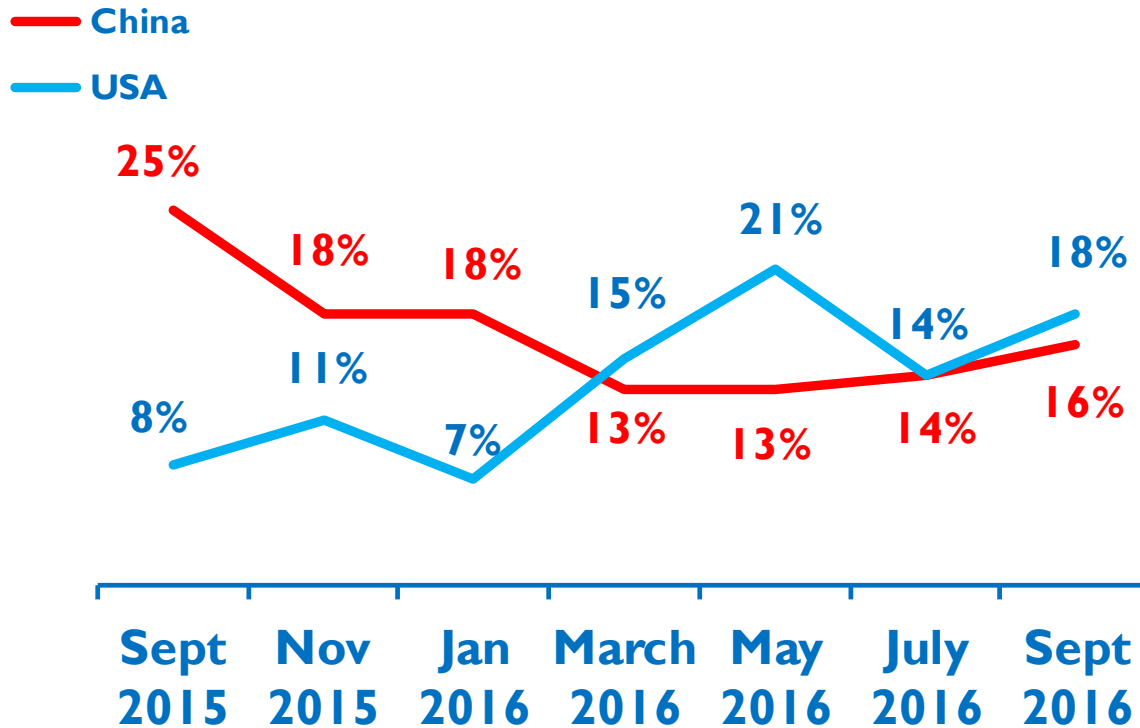
Increase most prominent amongst Accommodation Providers (67%) & Service Providers (63%)



Q3. Compared with July and August in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 73



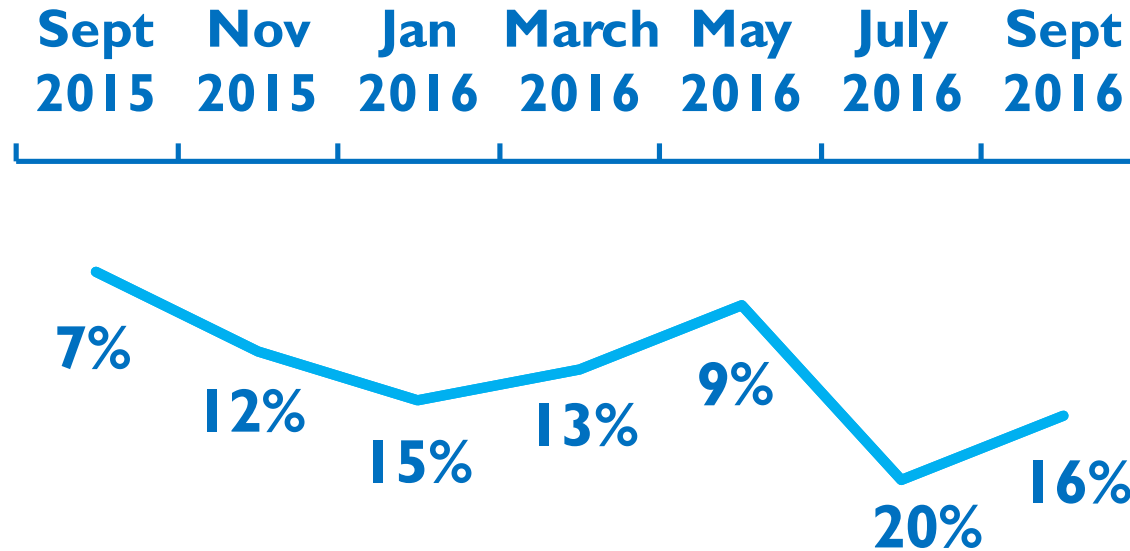
USA regains lead as top inbound growth market



29%
currently not experiencing growth from any overseas markets



France continues to be main declining market

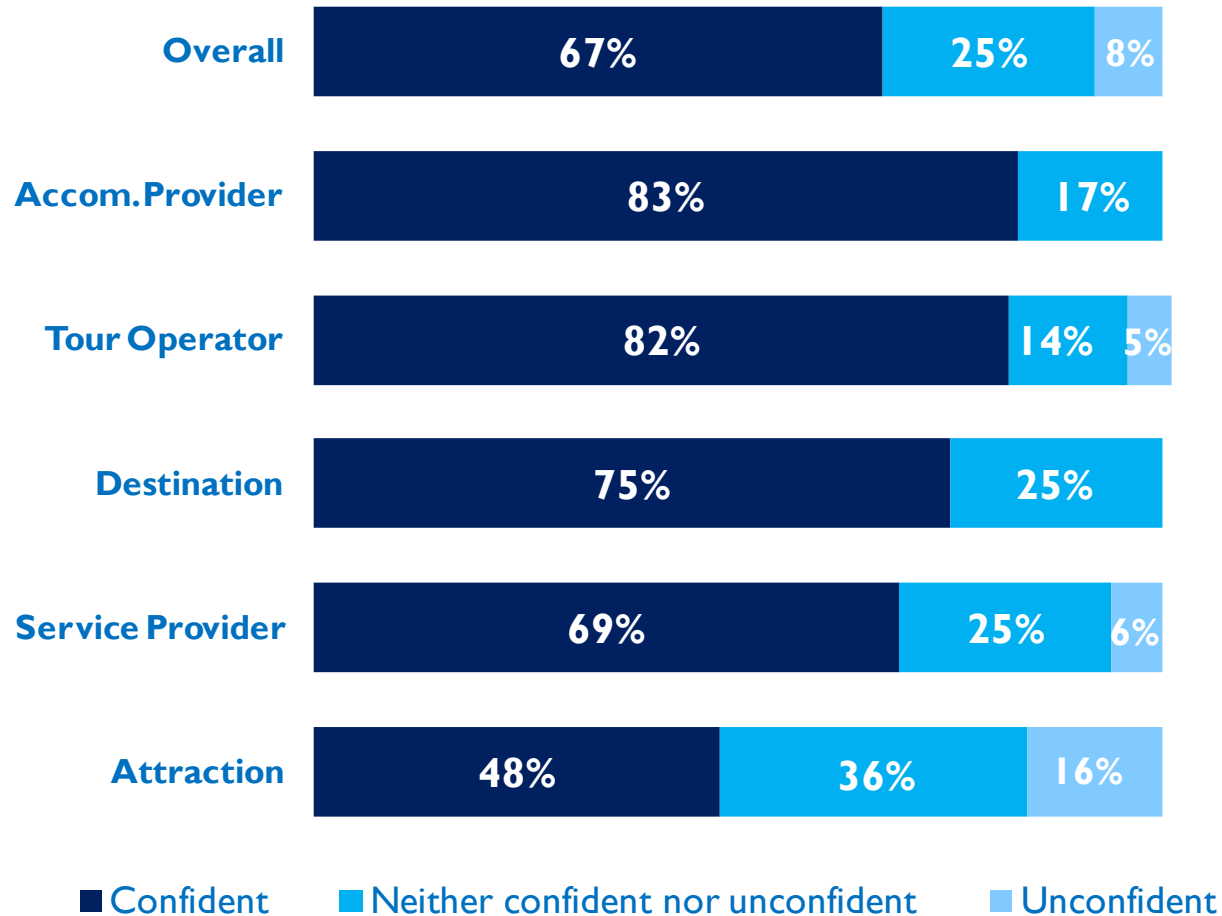


42%
currently not
experiencing
decline from any
overseas markets



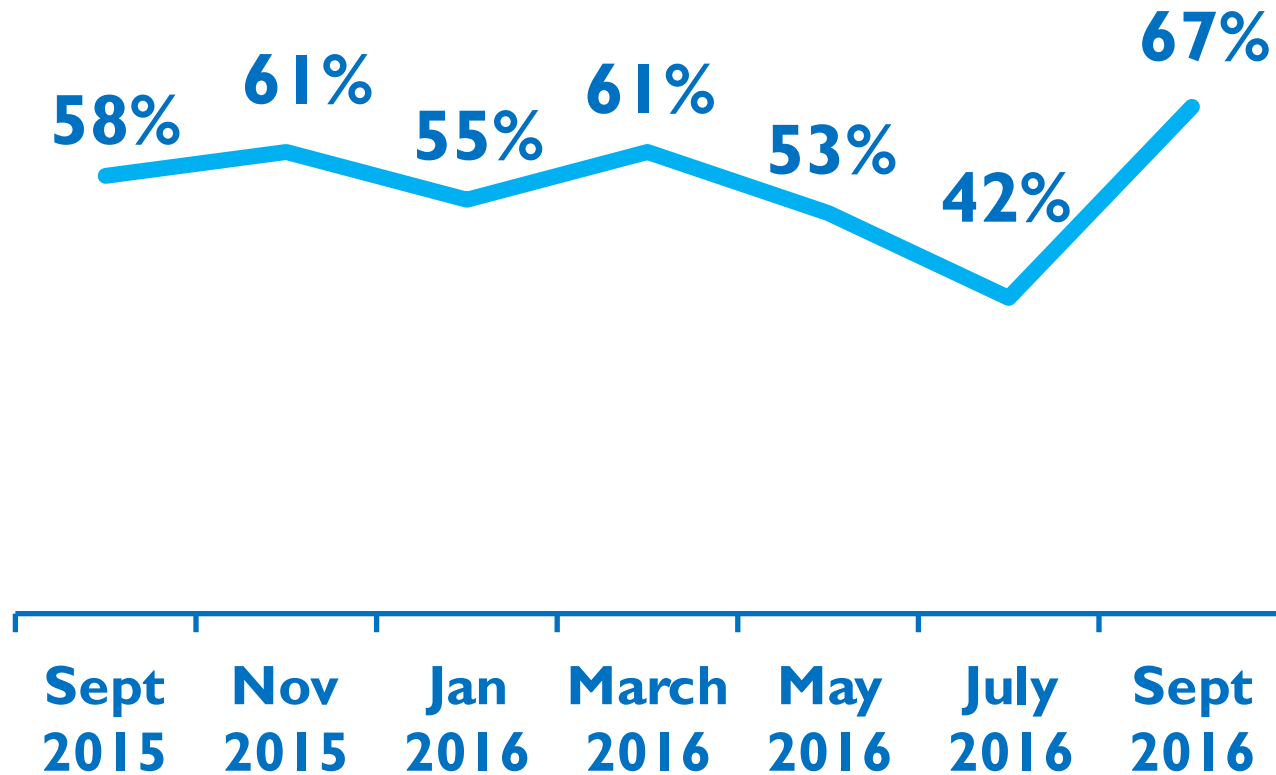
Q5. Please select the main market that you are currently experiencing decline in. Base: 73

Confidence levels highest amongst Accom. Providers regarding bookings / visitor revenues over next 12 months



Please note that the destination sample size is small (4 took part in the survey)

Sharp rise in confidence levels regarding bookings / visitor revenues over next 12 months



Members think that 'Brexit' could bring the following opportunities...

“Lower value of pound will bring exceptional growth.”
Attraction

“Reaffirm UK as destination separate to Europe.”
Tour Operator

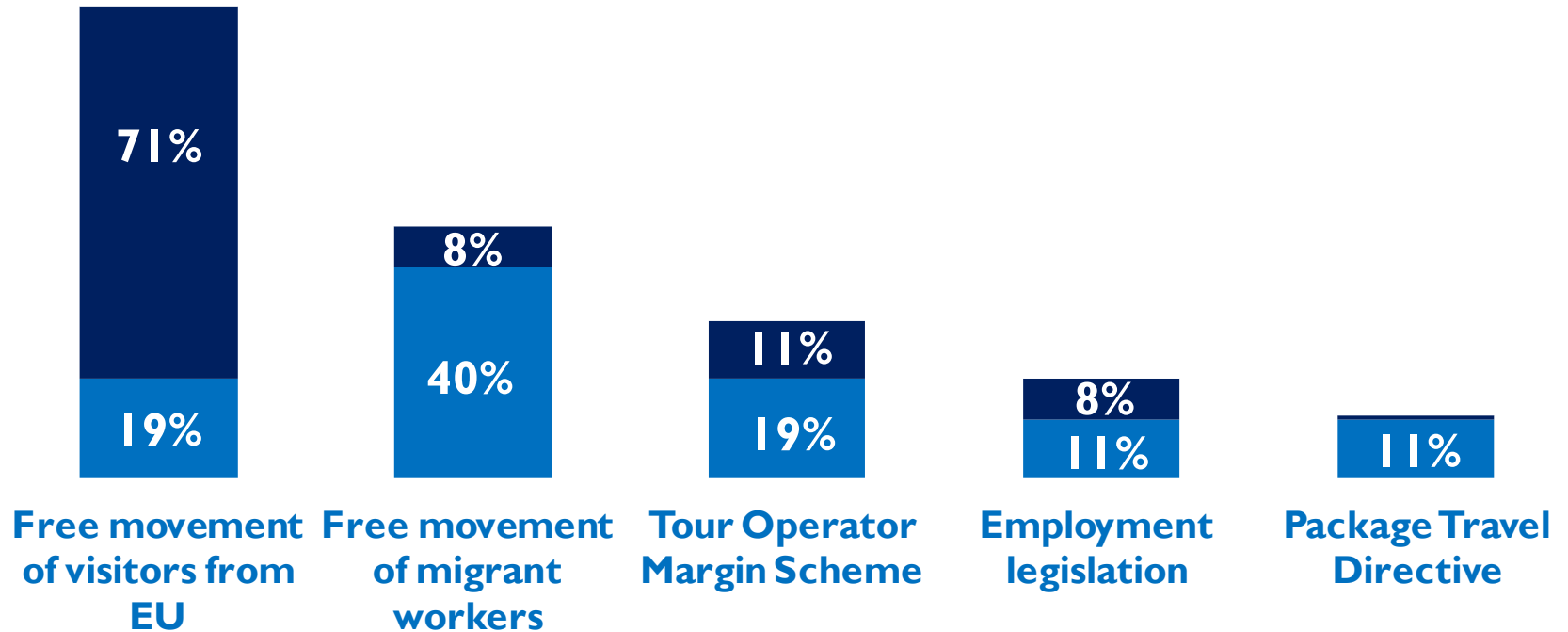
“UK 'staycations' likely to become attractive as exchange rates make overseas travel for UK nationals more expensive.”
Service Provider

“Increased visitors due to them seeing Britain as safer (terrorism) now it's not part of Europe.”
Tour Operator

16%
said that 'Brexit'
would bring no
opportunities



Free movement of visitors and migrants from EU a key priority



■ First Ranked Priority ■ Second Ranked Priority





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