



Business Barometer Survey 2015

Key Findings

May 15



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Aims & method

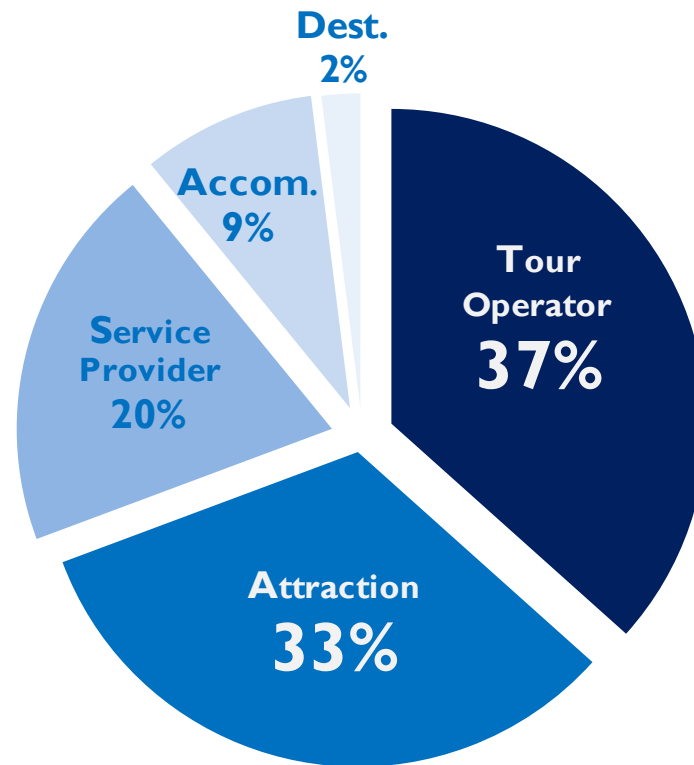
- **Business barometer survey of members**
- **The aims of the barometer are to:**
 - **Understand how different sectors of the membership are performing**
 - **Determine the level of business being generated by our membership**
 - **Inform lobbying and PR activity**
 - **Allow UKinbound to react to industry developments more quickly, by gathering feedback on current issues impacting the tourism industry**
- **Online survey sent out to members during May 2015**
- **46 completed questionnaires – 15% of members**
- **Many thanks for taking part!**

The top screenshot displays the survey title "UKinbound Business Barometer 2015" and a thank-you message. It lists the survey's aims: to understand different sectors, determine business levels, inform lobbying, and allow for faster industry reaction. It also explains that the survey is a confidential report for members and that the research is being carried out by Qa Research. Navigation buttons for "PREVIOUS" and "NEXT" are visible.

The bottom screenshot shows a questionnaire section titled "Air Passenger Duty". It includes a progress indicator "2% completed" and "NEXT" button. The questionnaire lists various metrics for rating, such as "Exchange rates", "Price", "Availability", "UK competitiveness with other destinations", "VAT", "Welcome", "Awareness of UK tourism product", "Number of visits into the UK from overseas destinations", "Airport capacity", "GREAT campaign", "Quality of accommodation", and "Awareness of other tourism services in the UK economy". Each metric has a row of five radio buttons for rating.

Varied mix of sectors took part

Sample reflective
of membership
breakdown.



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



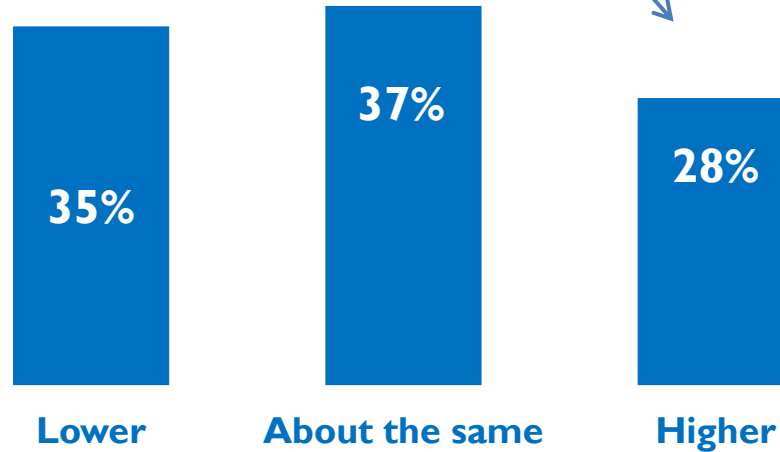
Q1. Which membership category do you fall into? Base: 46

Results

Bookings / visitor numbers in March & April increased for more than ¼ of members compared to previous year

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

15%



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

17%

70% of Tour Operators stated 'higher' (35%) or 'about the same' (35%)

Two thirds of Service Providers stated 'about the same' (67%)

Decrease most prominent amongst Attractions

Why did your bookings / visitor numbers increase?

“A greater presence, promoting the product more effectively to the travel trade community”

“Warm weather and great value online price”



“More Chinese tourists are coming into Europe”

“More promotion – TV trail, attended more trade fairs including regional across the UK. Attending UKInbound Convention and CTC Annual Conference”

Why did your bookings / visitor numbers decrease?

“US market didn’t travel at the start of the year – possibly due to world events”

“Drop in spending by visitors from Europe”



“Strong GBP...making the UK an expensive destination”

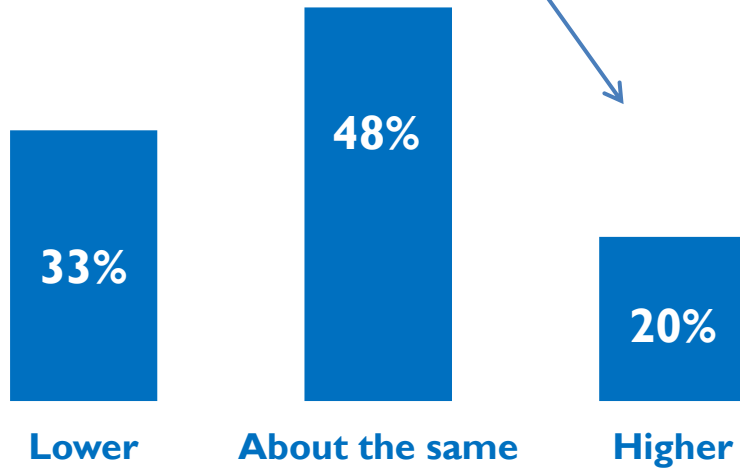
“Less money in the industry due to budget cuts and caution ”

“Mainly the exchange rate different”

Revenue yield in March & April 15 increased for 1/5 of members compared to previous year

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

10%



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

15%

Tour Operators (59%) and Service Providers (67%) were more likely to state 'about the same'

Decrease most prominent amongst attractions



China the key growth market for the period

24%



China

11%



Germany

9%



France

30%

had not experienced
growth from any
overseas markets

Q4. Please select the main market that you are currently experiencing growth from.
Base: 46

France most frequently cited as declining

9%



France

7%



Japan

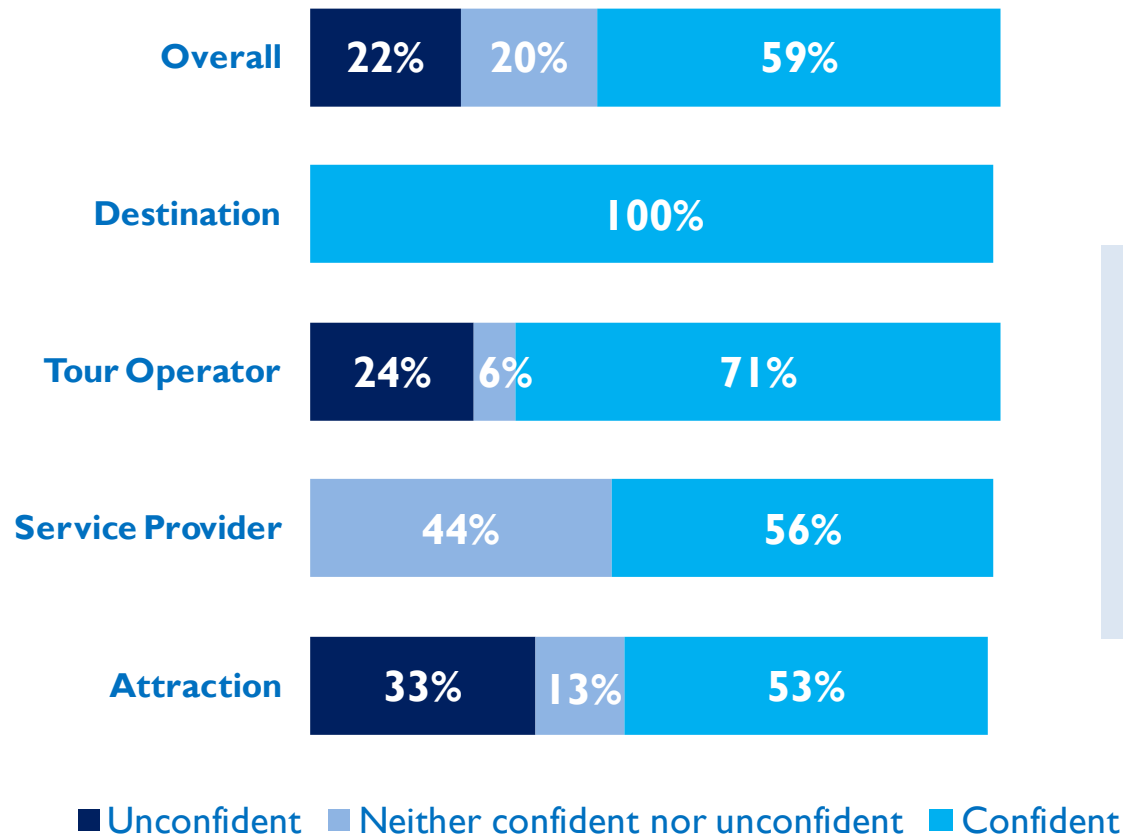
52%

had not
experienced
decline from
any overseas
markets

Q5. Please select the main market that you are currently experiencing decline from.
Base: 46

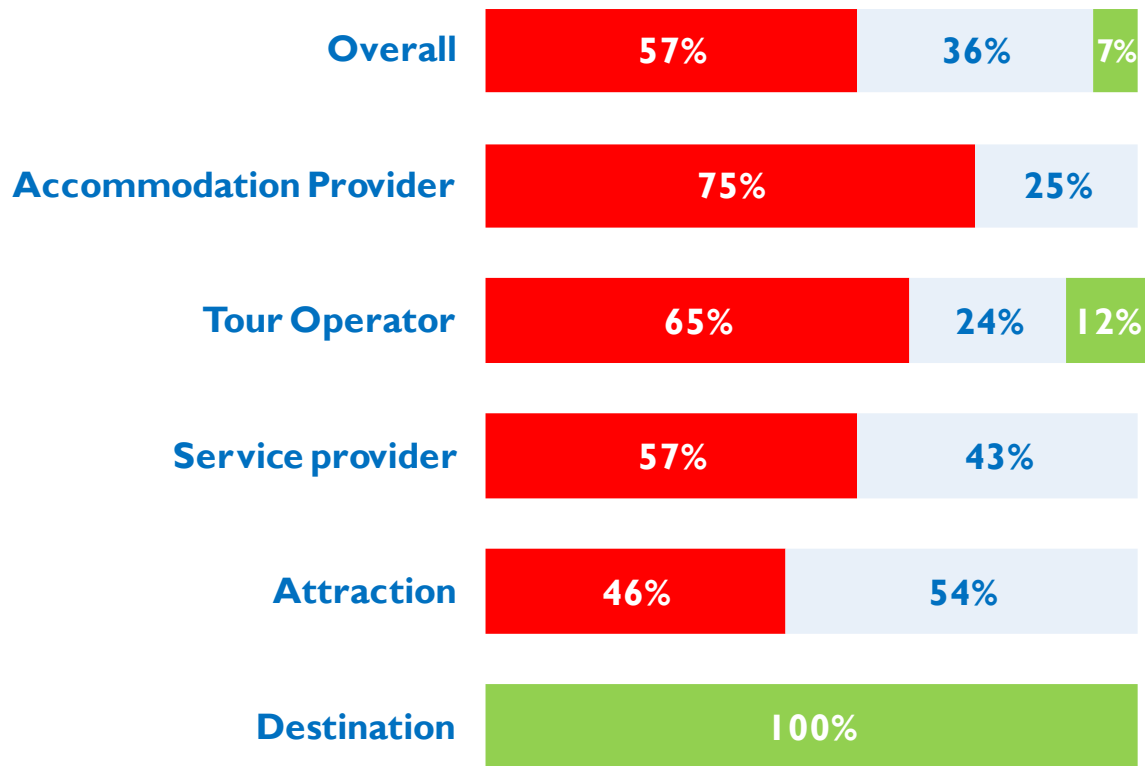
Confidence levels remain high regarding expected bookings / visitor revenues over next 12 months

Tour Operators reveal increase in confidence levels since March survey results



Attractions, Accom. Providers and Service Providers reveal decrease in confidence levels about bookings / visitor rev. since March survey results

Fluctuation of the current sterling exchange having an overall negative impact on business

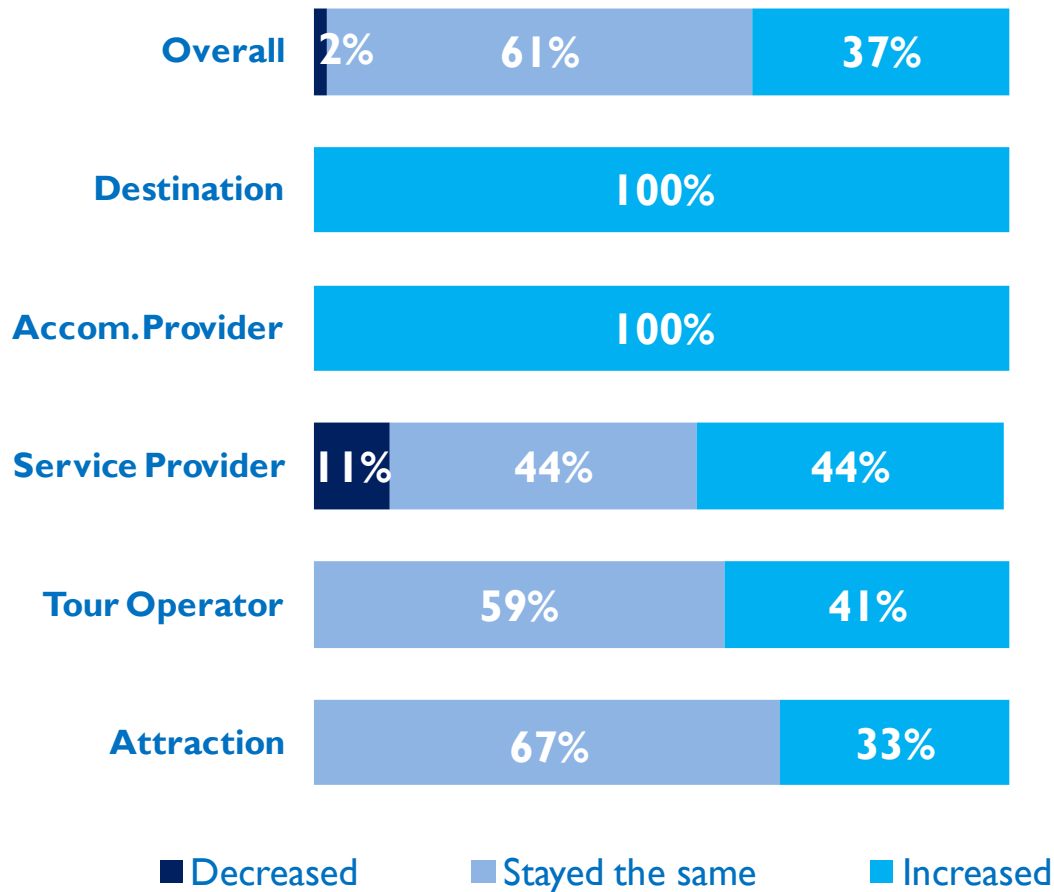


■ Negative ■ Neither in a positive nor negative way ■ Positive



Q7. How is the fluctuation of the current sterling exchange rate impacting your business? Base: 42

More than 1/3 of members increased staff numbers in the last year



Total number of employees increased by 14% on average

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