



# Business Barometer Survey 2016

## Key Findings

May 16



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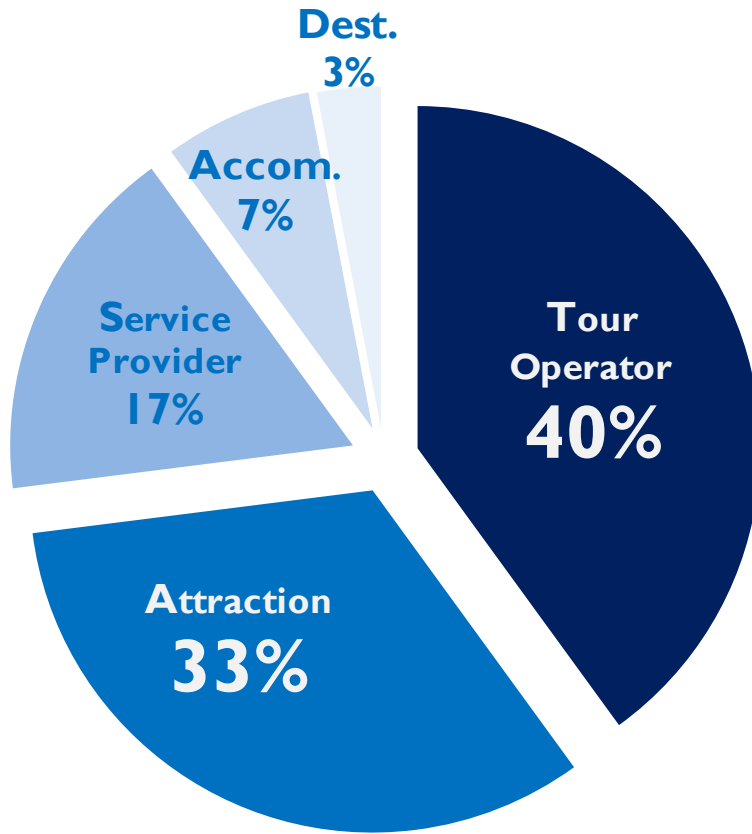


# Aims & method

- **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 May 2016**
- **75 completed questionnaires – 21% of members**
- **Many thanks for taking part!**

The top screenshot shows the survey title "UKinbound Business Barometer 2016" and a thank you message. It lists the survey's aims: to understand how different sectors are performing, determine the level of business generated, inform lobbying and PR activity, and allow UKinbound to react to industry developments. It also mentions that the survey is being conducted by Qa Research Ltd, an independent research agency, and that the results will be used to inform the industry's development strategy. The bottom screenshot shows the survey questions, including "Air Passenger Duty", "VAT", "Welcomes", "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 generators in the UK economy". A progress indicator shows "21% completed" and "NEXT" and "PREVIOUS" buttons.

# Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



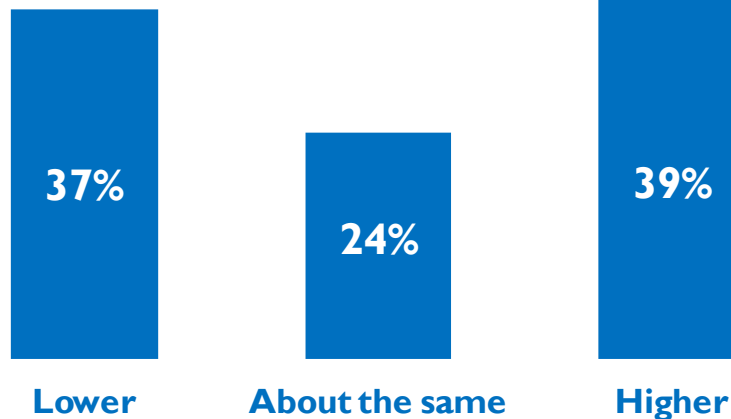
Q1. Which membership category do you fall into? Base: 75

Results

# Bookings / visitor numbers in March & April 16 increased for just over two thirds of members compared to 2015

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

**28%**



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

**15%**

Increase most prominent amongst attractions (44%)

High proportion of accommodation providers (80%) stated 'lower'

# Why did your bookings / visitor numbers increase?

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

*“Increased awareness and reduction in fares”*  
**Service Provider**

*“We had repeat visitors from last season and an increase of positive word of mouth bookings”*  
**Destination**

*“More business from the US”*  
**Tour Operator**

*“Excellent weather and increased operational model”*  
**Attraction**

# Why did your bookings / visitor numbers *decrease*?

*“One of our main markets in Norway – their currency due to low oil prices remains very low compared to the £”*

**Tour Operator**

*“Tourists have been cautious due to economic situation / world events.”*

**Tour Operator**

*“Concerns about the security situation in France and Belgium rubbing off on library”*

**Service Provider**



*“The perception that the Lake District was closed after the floods”*

**Attraction**

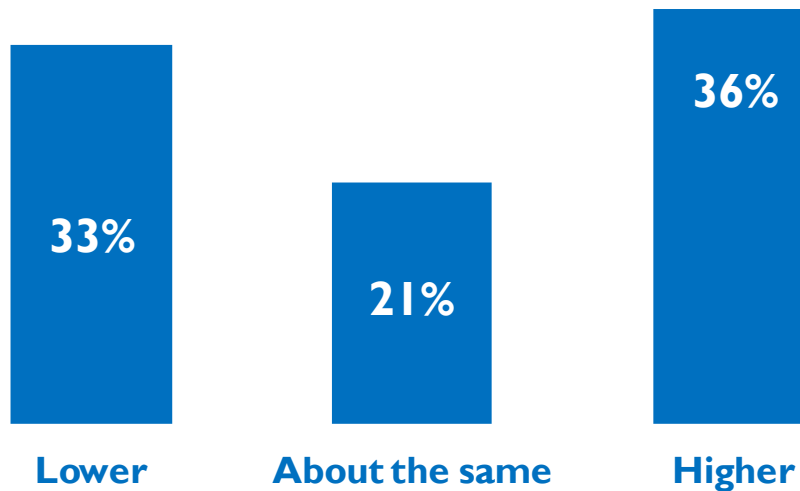
*“Less demand from certain markets”*

**Accommodation provider**

# Revenue yield in March & April 16 increased for just over two-thirds of members compared to 2015

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

**21%**



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

**16%**

Increase most prominent amongst Attractions (44%)

Decrease amongst Service providers (62%)

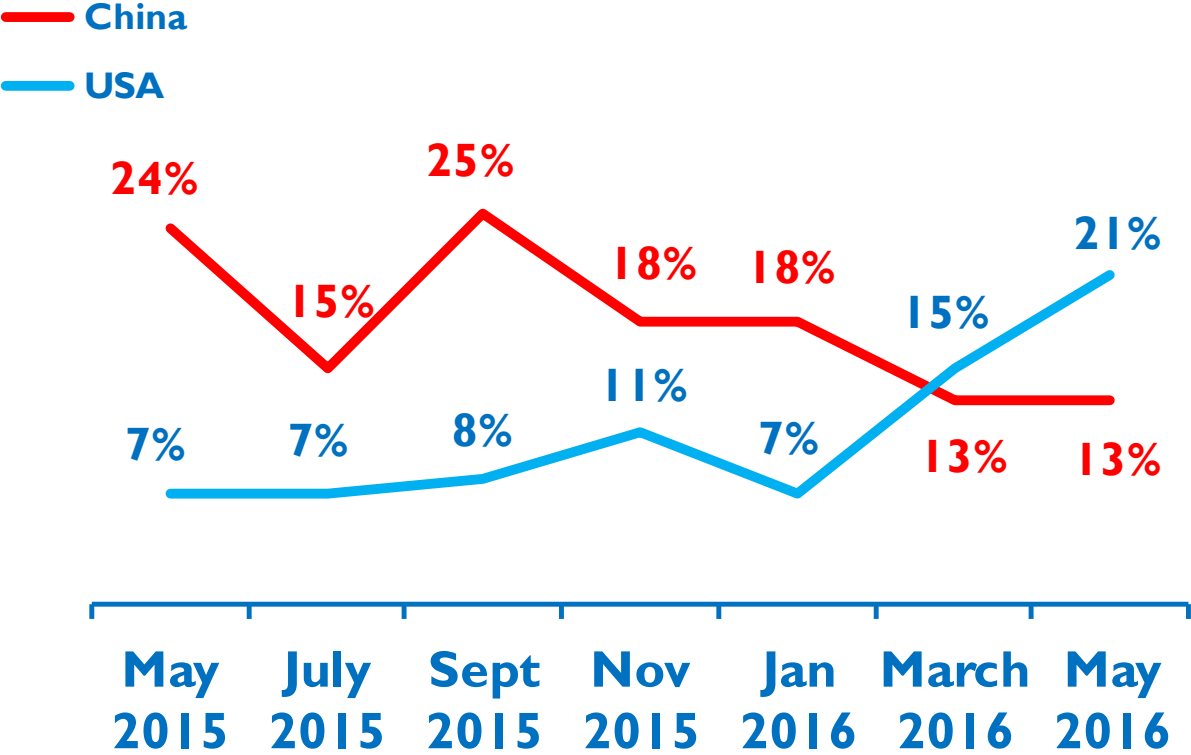


Q3. Compared with March and April in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 75





# USA continues to surpass China as current key growth market

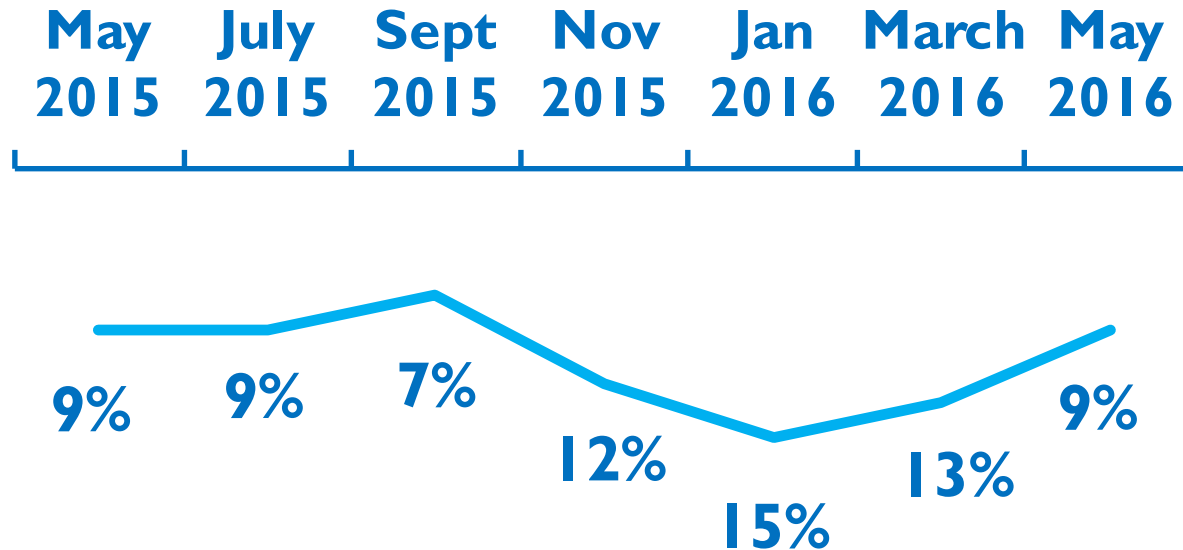


**29%**  
currently not experiencing growth from any overseas markets



Q4. Please select the main market that you are currently experiencing growth in. Base: 75

# France continues to be main declining market

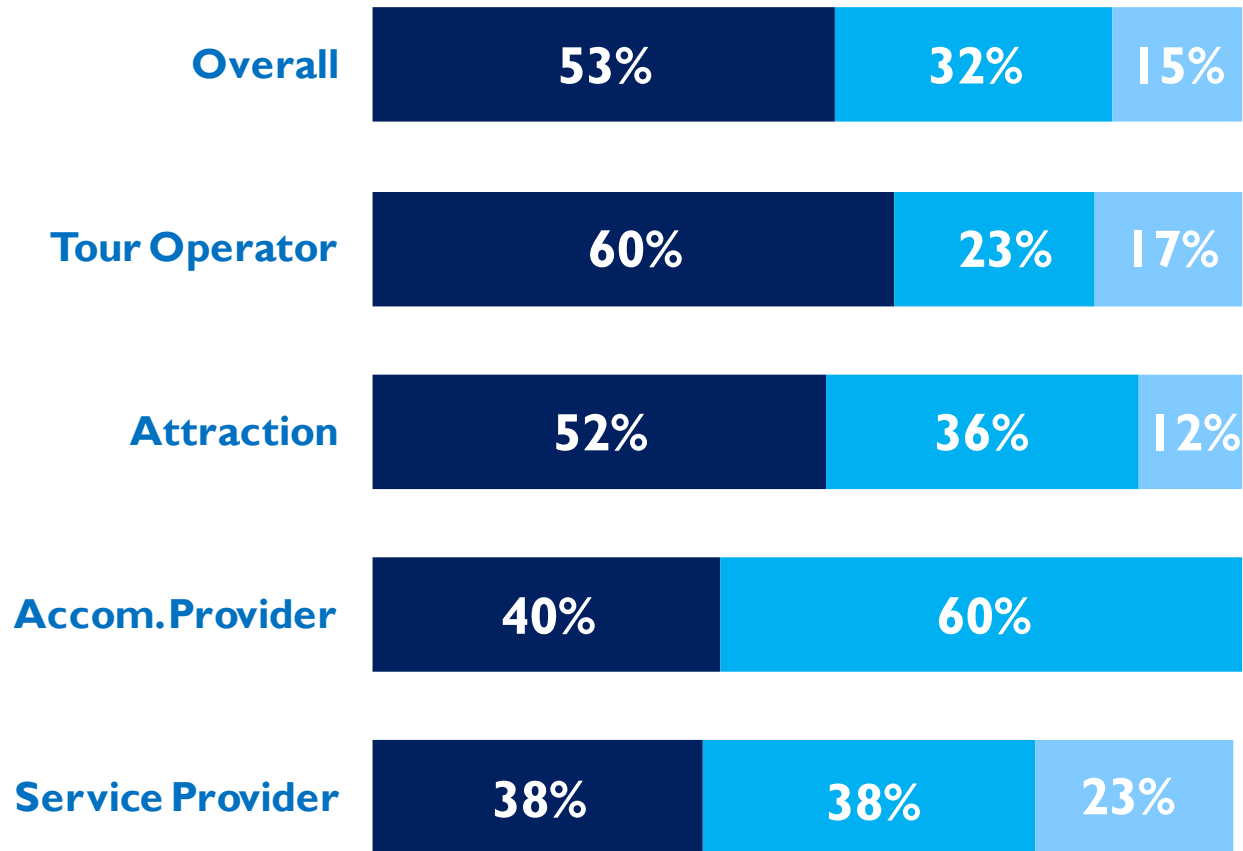


**40%**  
currently not  
experiencing  
decline from any  
overseas markets



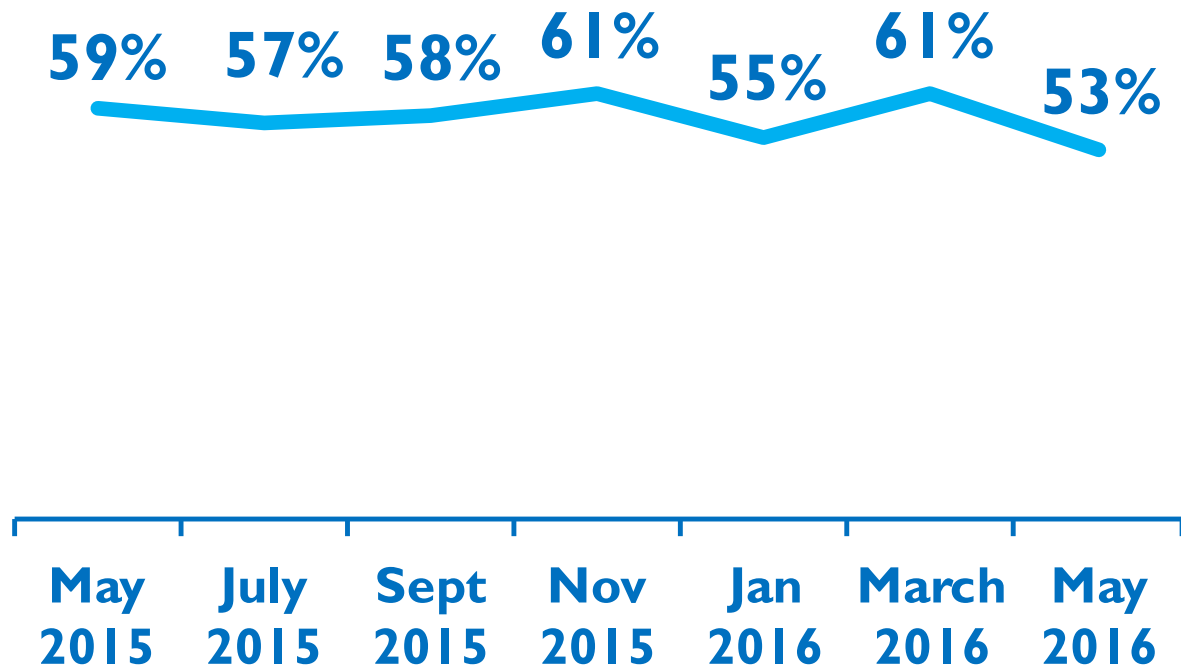
Q5. Please select the main market that you are currently experiencing decline in. Base: 75

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

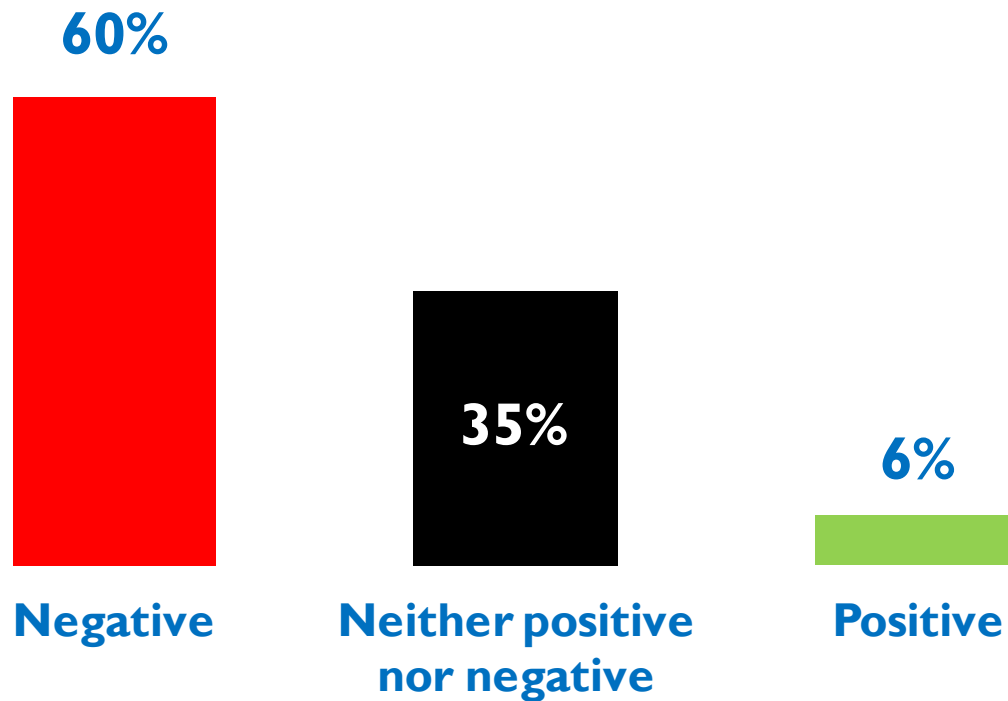


■ Confident ■ Neither confident nor unconfident ■ Unconfident

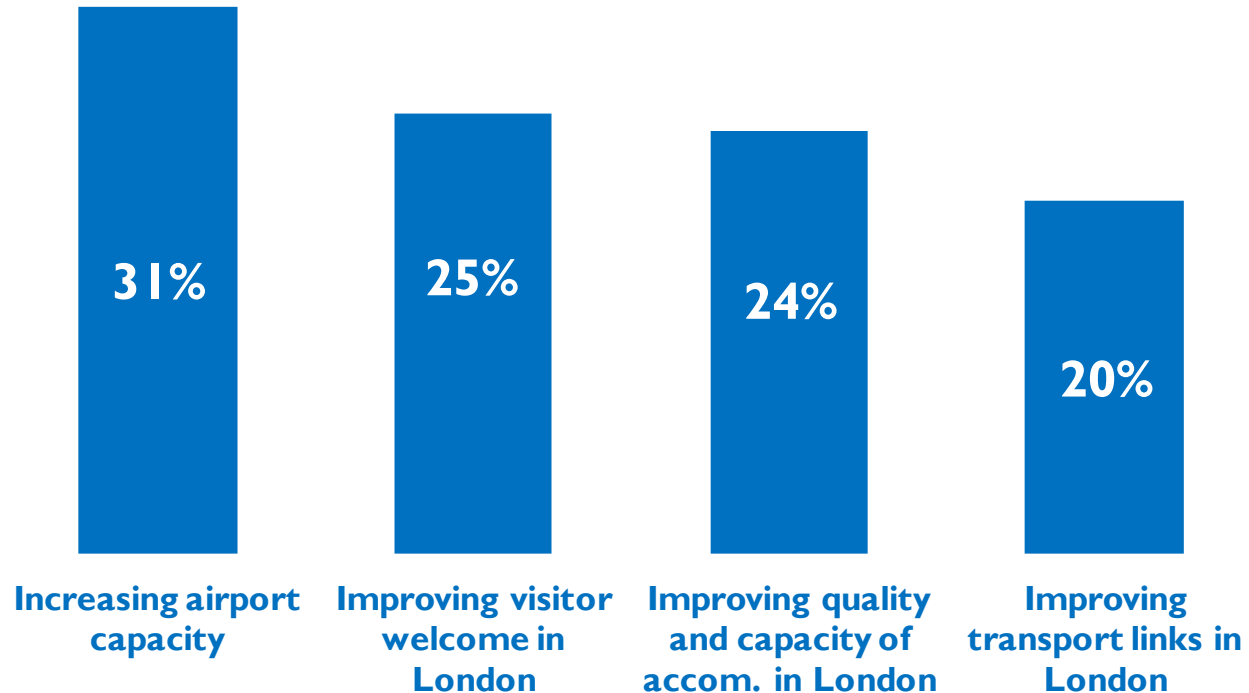
# Confidence levels showing a decrease and down on May 15 regarding bookings / visitor revenues over next 12 months



# Nearly two / thirds of members think that a 'Brexit' may have a negative impact on their bookings in 2016



# Increasing airport capacity seen as key priority for new Mayor of London



Q8. Please rank the following improvements that you think the new Mayor of London should prioritise (with 1 being the highest priority and 4 being the lowest priority) Base: 75

## Contact ...

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