



Business Barometer Survey 2015

Key Findings

July 15



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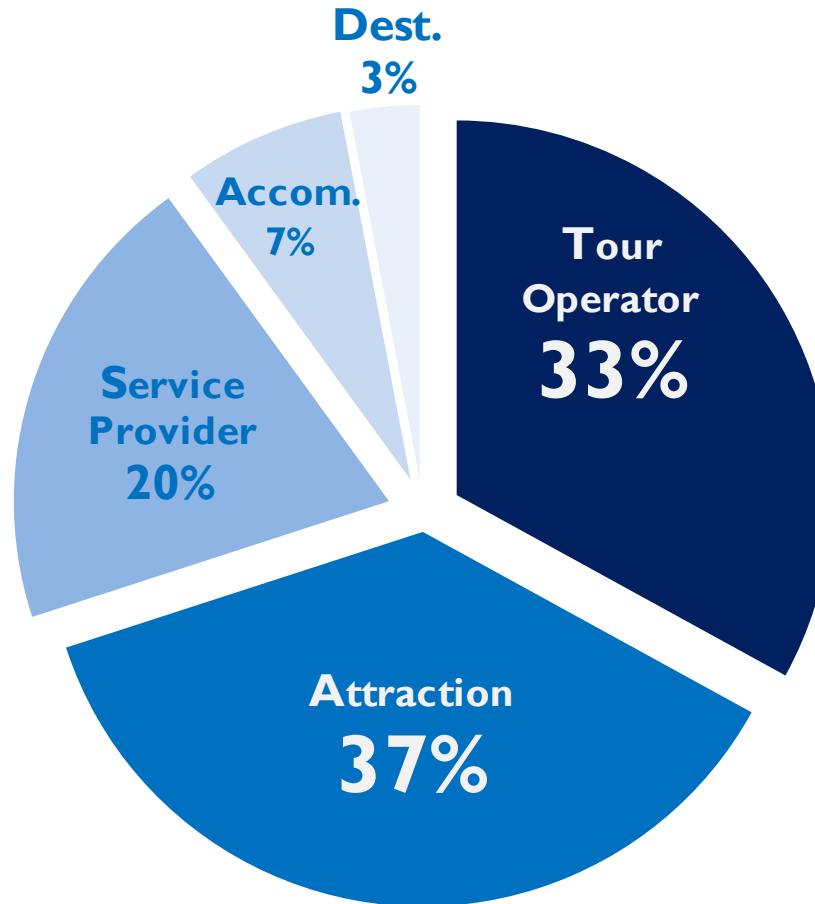
Aims & method

- **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 July 2015**
- **75 completed questionnaires – 22% of members**
- **Many thanks for taking part!**

The image displays two overlapping screenshots of the UKinbound Business Barometer 2015 survey. The top screenshot shows the introductory text, which includes the UKinbound logo and a thank you message. It outlines the survey's purpose: to understand how different sectors of the membership are performing, determine the level of business being generated, inform lobbying and PR activity, and allow UKinbound to react to industry developments more quickly. It also mentions that the survey is being conducted by Qa Research, an independent research agency, and that the results will be used to inform the industry's development more quickly. The bottom screenshot shows the survey questions, which include a progress indicator (2% completed) and navigation buttons (PREVIOUS and NEXT). The questions cover various aspects of the tourism industry, such as exchange rates, price, availability, UK competitiveness with other countries, VAT, welcome, awareness of UK tourism products, number of visits from overseas destinations, airport capacity, GREAT campaign, quality of accommodation, awareness of other tourism products, and UK infrastructure.

Varied mix of sectors took part

Sample reflective
of membership
breakdown.



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



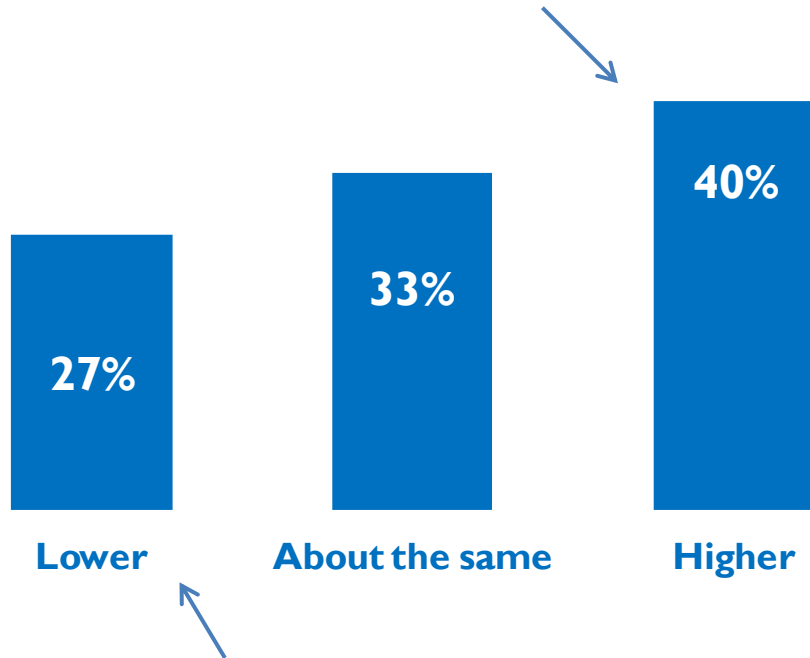
Q1. Which membership category do you fall into? Base: 75

Results

Bookings / visitor numbers in May & June increased compared to previous year

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

20%



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

17%

Three quarters of Tour Operators stated 'higher' (44%) or 'about the same' (32%)

One third of Service Providers saw an increase (33%)

Decrease most prominent amongst Attractions (39%)

Why did your bookings / visitor numbers increase?

*“Favourable market conditions,
investment in attractions and
successful marketing”*
- Attraction

*“Availability from hotels,
strength of the brand,
visitors travelling outside
of London”*
**- Accommodation
Provider**

*“More product range
available and better
marketing strategies”*
- Service Provider



*“We had a number of
large one off events”*
- Tour Operator

*“Concerted efforts to drive up numbers via
promotion - trade fairs, professional
memberships, BBC One trail”*
- Attraction

Why did your bookings / visitor numbers decrease?

“London hotels do not offer good value for money at the moment...prices are simply too high” - **Tour Operator**

“Large number of cancellations from French school groups after Charlie Hebdo” - **Attraction**

“Strength of the £ has made it very expensive for international guests to travel here, principally Australia and Canada” - **Attraction**

“Continued decline from Euro zone, Scandinavia, Japan” - **Service Provider**

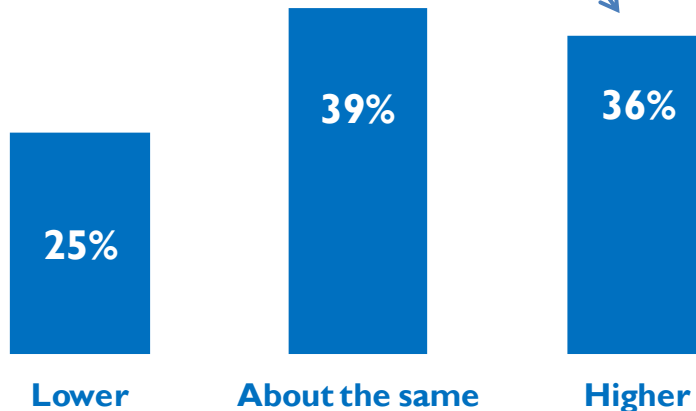
“Slow start to the season, experienced by all tour operators working in the US market” - **Tour Operator**



Revenue yield in May & June 15 increased for over one third of members compared to previous year

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

19%



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

17%

Increase most prominent amongst Accommodation Providers (60%) and Attractions (43%)

Service Providers (60%) were more likely to state 'about the same'

Decrease most prominent amongst Tour Operators (36%)



Q3. Compared with May and June in 2014, was your revenue yield for the same period in 2015: higher, about the same or lower? Base: 75



USA & China key growth markets for May & June

16%



15%



China

11%



Germany

27%

had not experienced
growth from any
overseas markets

France most frequently cited as declining

9%



France

7%

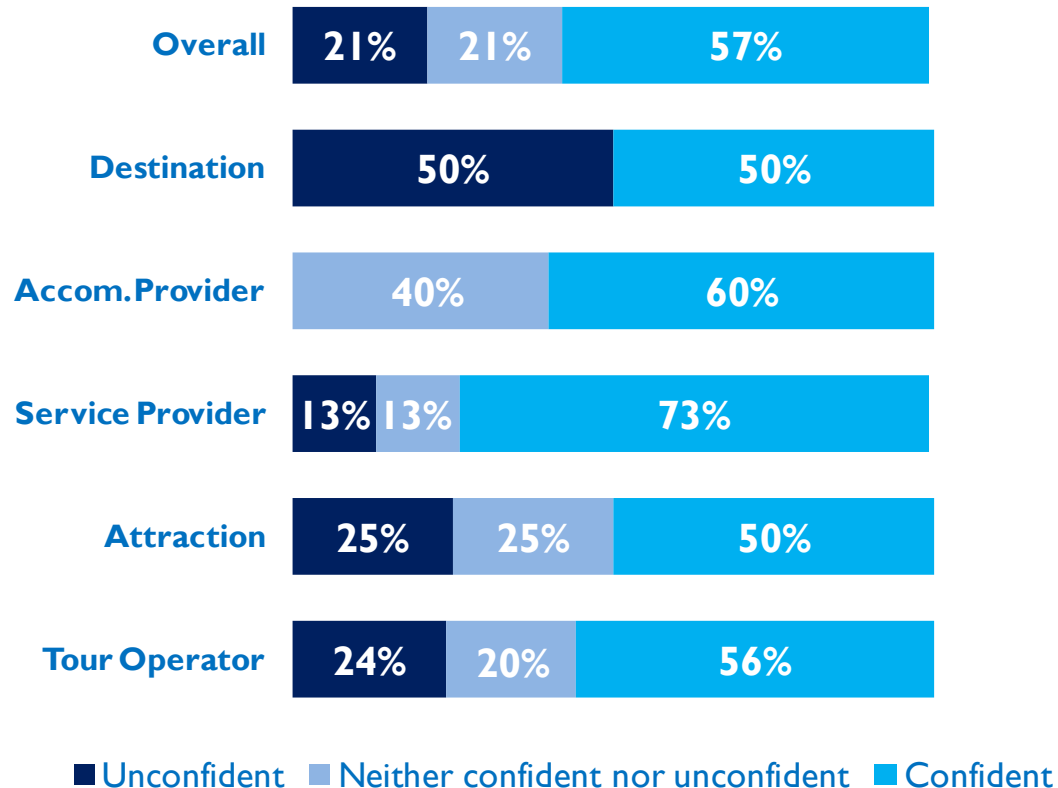


Italy

45%

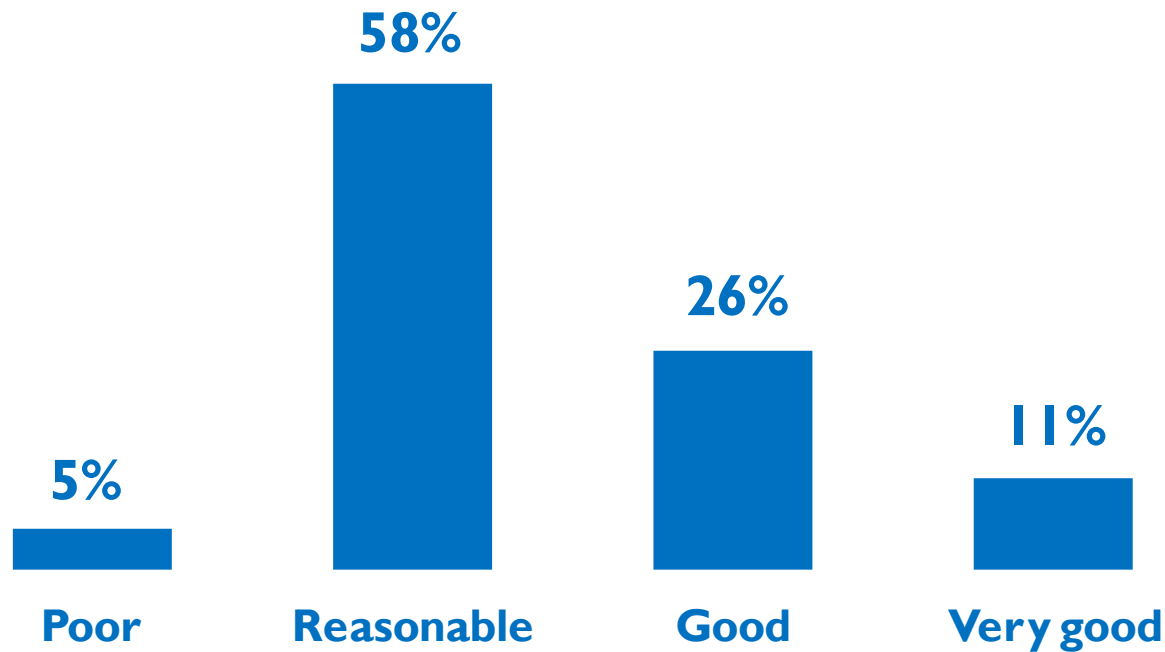
had not
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any overseas
markets

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



Q6. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues? Base: 75

UKinbound membership provides mixture of 'good' & 'reasonable' levels of ROI



Encourage more members to take part in the survey by...

- Continuing to incentivise
- Ongoing reassurance of data security & confidentiality
- More regular reminders during survey period
- Stressing the benefits & importance of taking part
- Making it compulsory

“It is a matter of trust so in the communication you have to put a big emphasis on reassuring people the data will not be misused”

“Mention more at networking events. Stress the benefits more”

“Your free home page banner is a good one – I’m sure you can come up with similar incentives”

“Suggest it is a membership duty”

“Send them reminders 2-3 times”



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