



Business Barometer Survey 2016

Key Findings

July 16

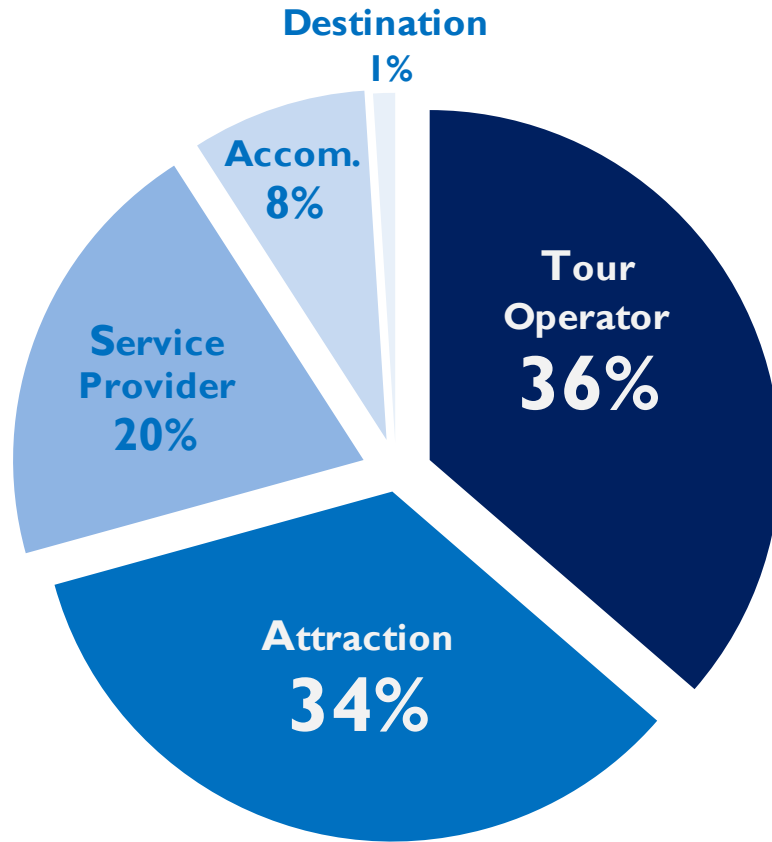


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Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



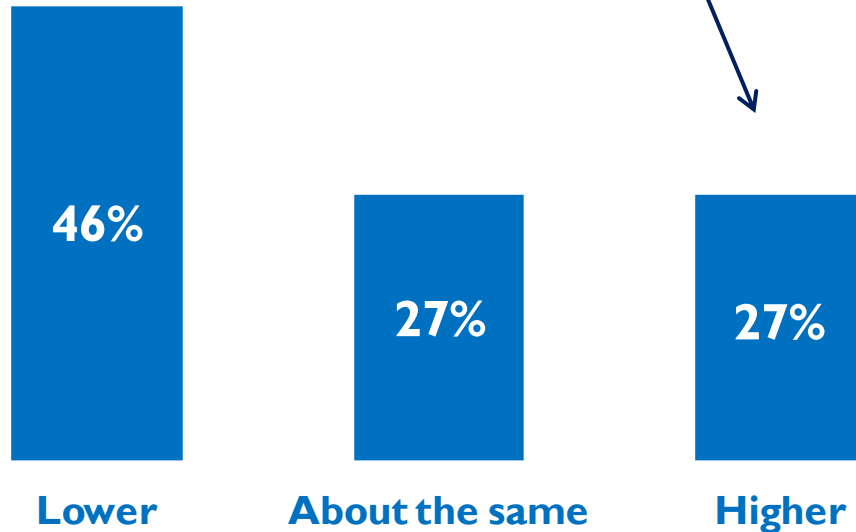
Q1. Which membership category do you fall into? Base: 74

Results

Bookings / visitor numbers in May & June 16 are lower for nearly half of members compared to 2015

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

27%



High proportion of attractions (64%) stated 'lower'

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

13%



Why did your bookings / visitor numbers increase?

“Significantly more business from the US”
Tour Operator

“Ramadan dates were earlier in 2016”
Service Provider

“Increased number of tour operator partners”
Accommodation provider



“Further work making ourselves known in the market”
Service Provider

“Investment in the attraction aligned with successful marketing campaigns”
Attraction

Why did your bookings / visitor numbers *decrease*?

*“After affect from Paris/Brussels attacks.
School groups from France and Belgium in
particular are still hugely down”*

Attraction

*“June was a particularly
wet month which affects
the tours”*

Tour Operator

*“Less individual tourists
in London - less foreign
groups”*

Service Provider



*“Weather, Brexit, Terrorism threat? Or
potentially just cheaper alternatives
elsewhere in the market”*

Attraction

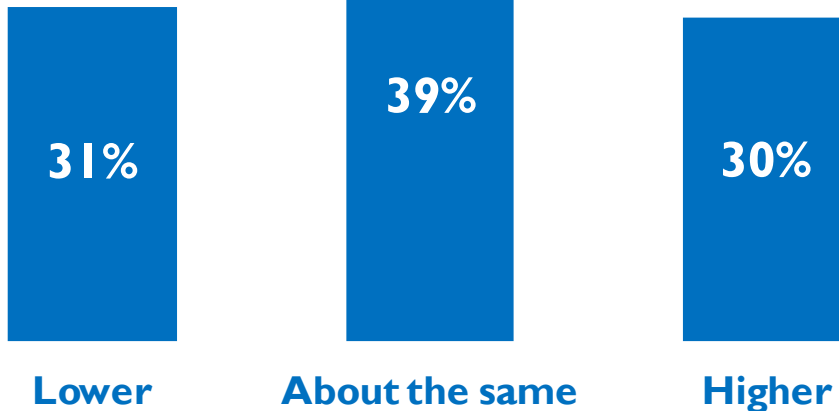
*“Terrorist attacks, USA elections, currency
issues at time of booking”*

Attraction

Revenue yield in May & June 16 increased for just under one-third of members compared to 2015

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

24%



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

15%

Increase most prominent amongst accommodation providers (50%)

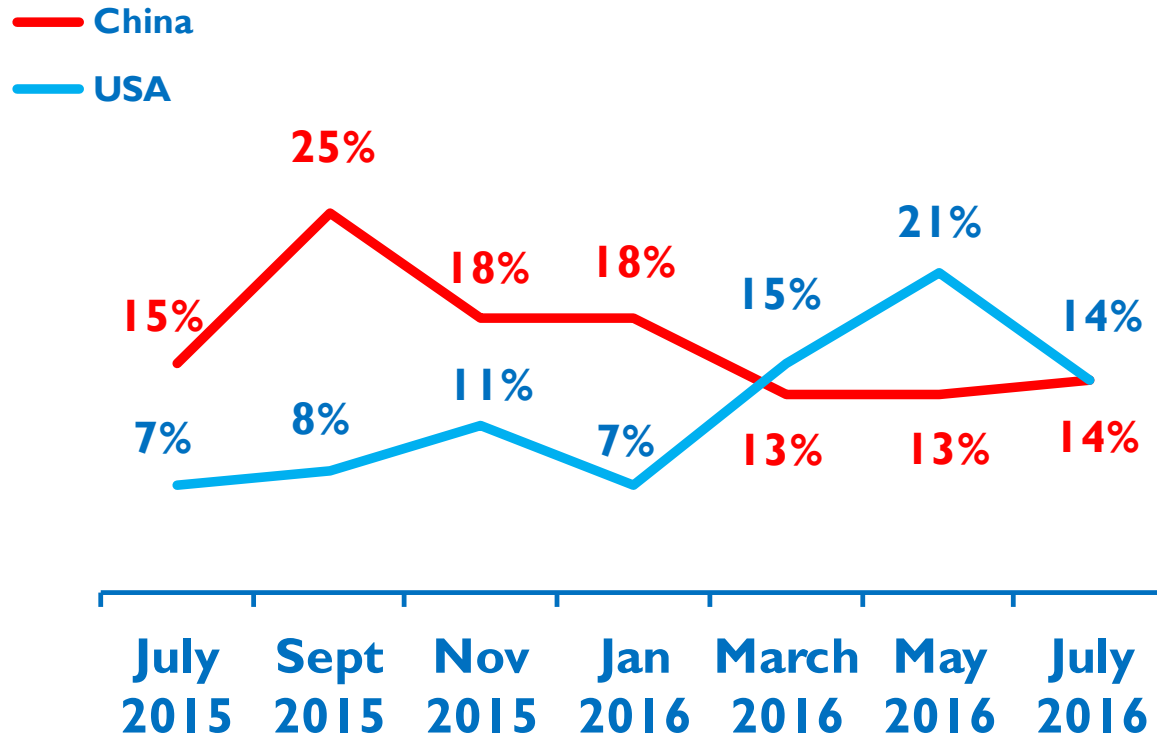
Decrease amongst attractions (44%)



Q3. Compared with May and June in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 74



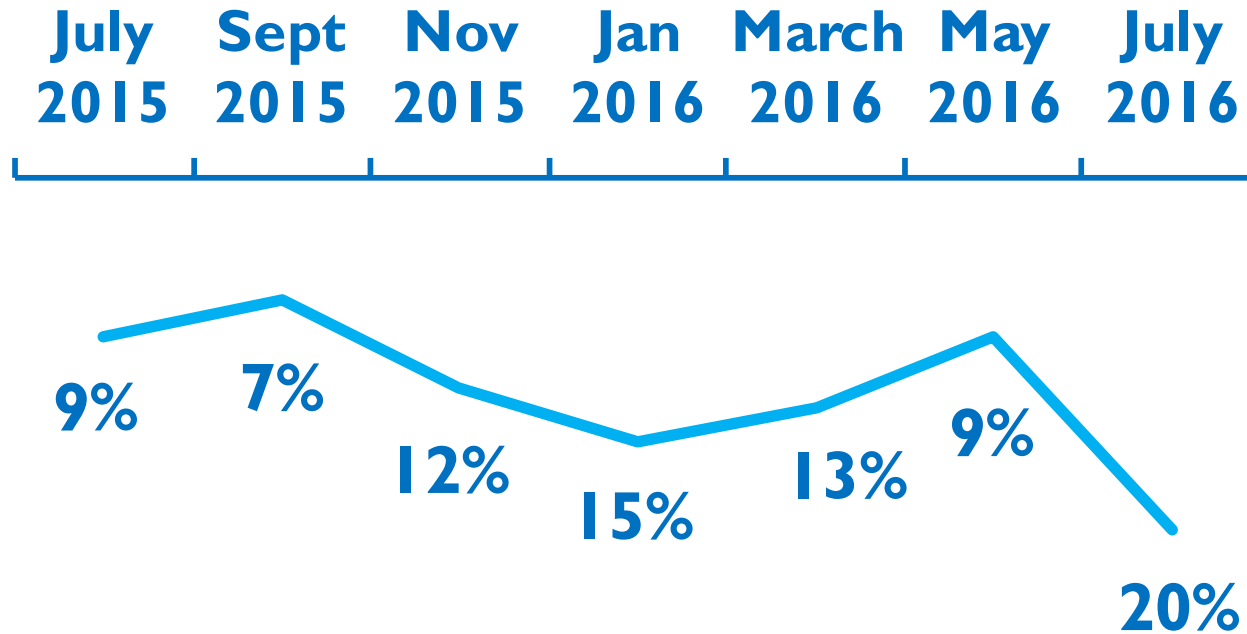
Dip in USA growth but still key market with China



26%
currently not experiencing growth from any overseas markets



France in sharp decline as fifth of members drop bookings

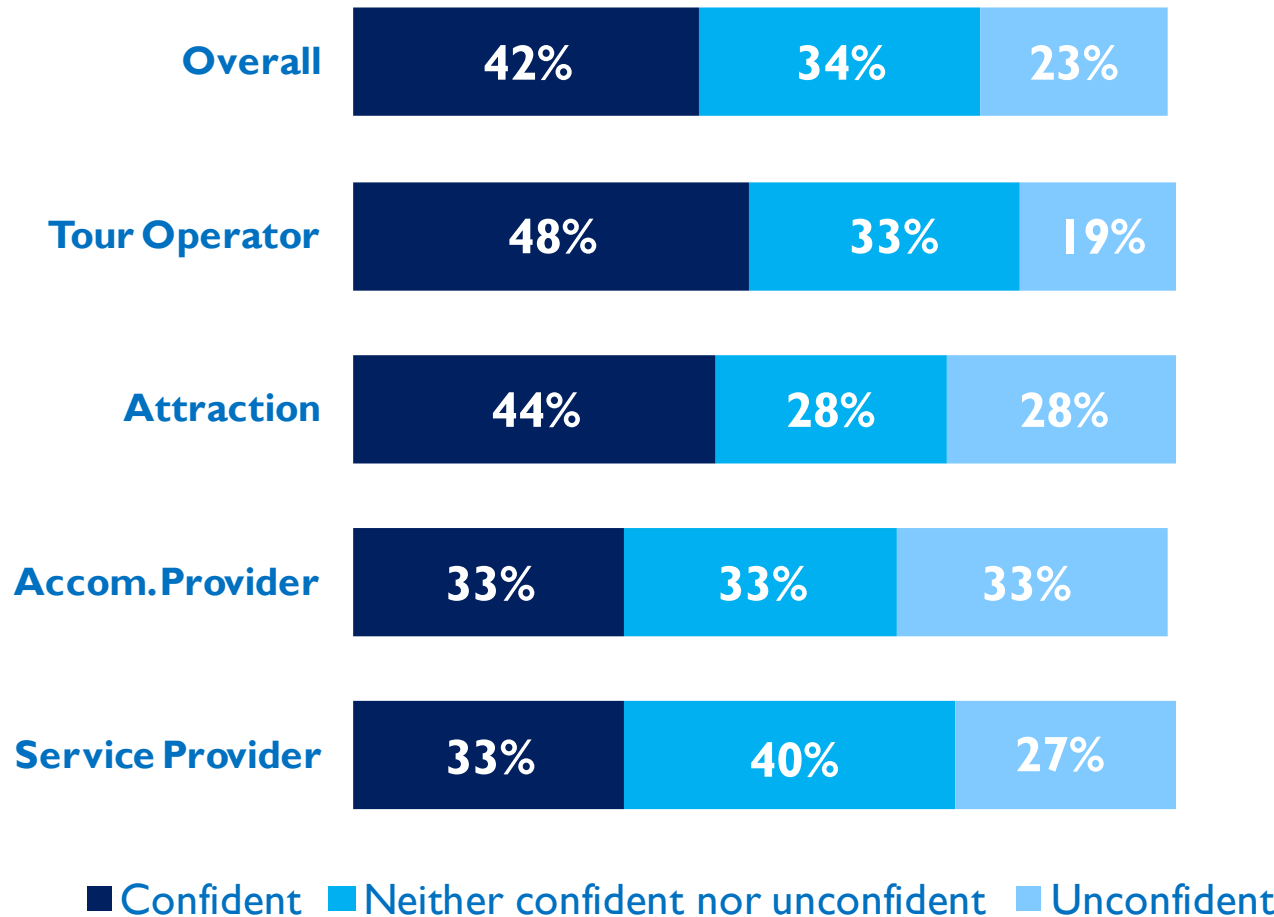


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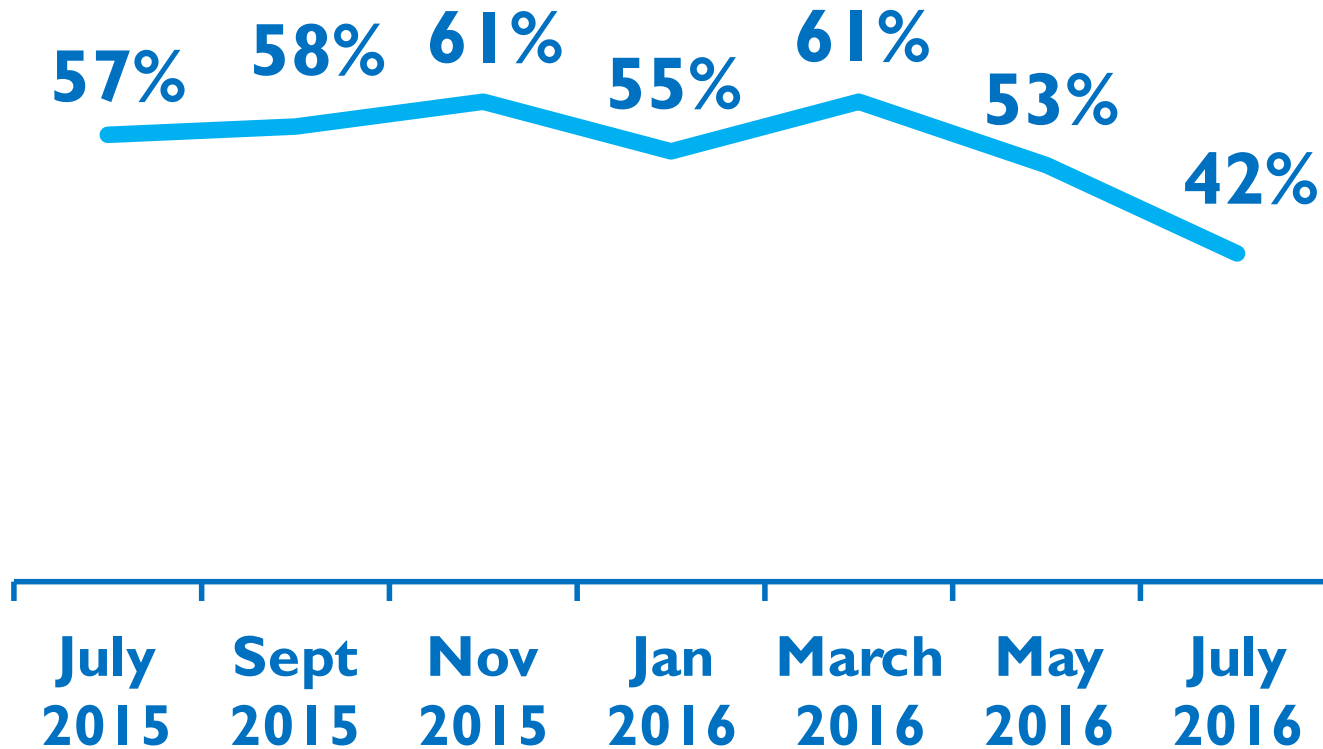


Q5. Please select the main market that you are currently experiencing decline in. Base: 74

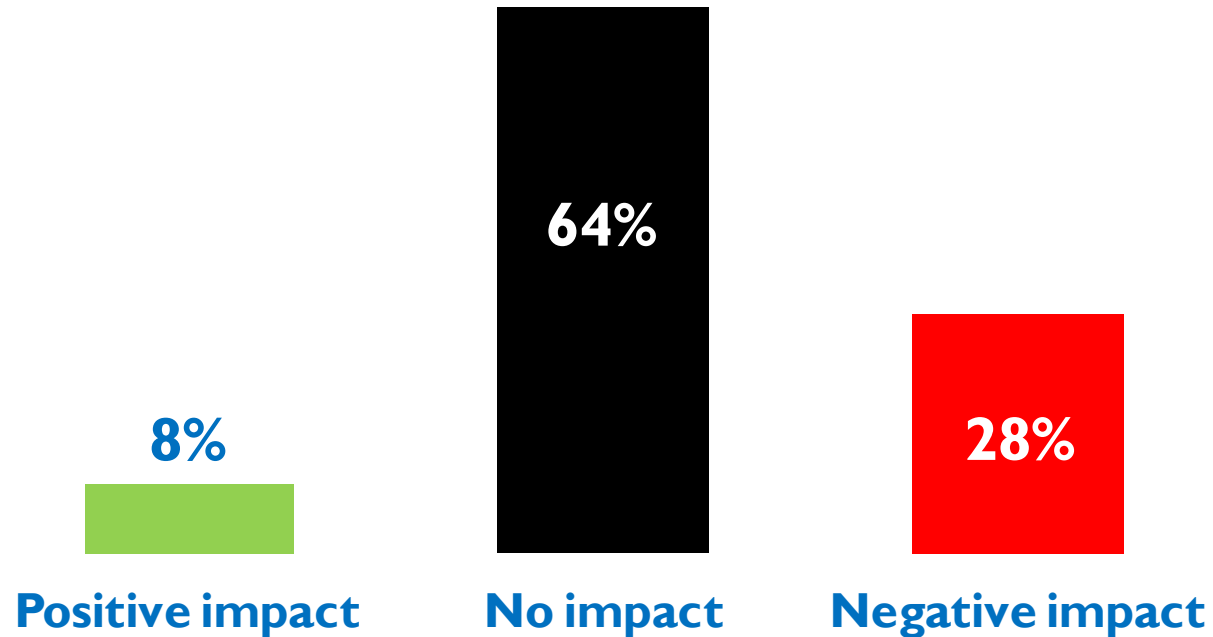
Confidence levels highest amongst Tour Operators regarding bookings / visitor revenues over next 12 months



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



Nearly two / thirds of members said that 'Brexit' has not had an impact on their business



Q7. What impact has your business seen , if any, since the decision to leave the EU? Base: 74

Members have seen the following impacts since 'Brexit'...

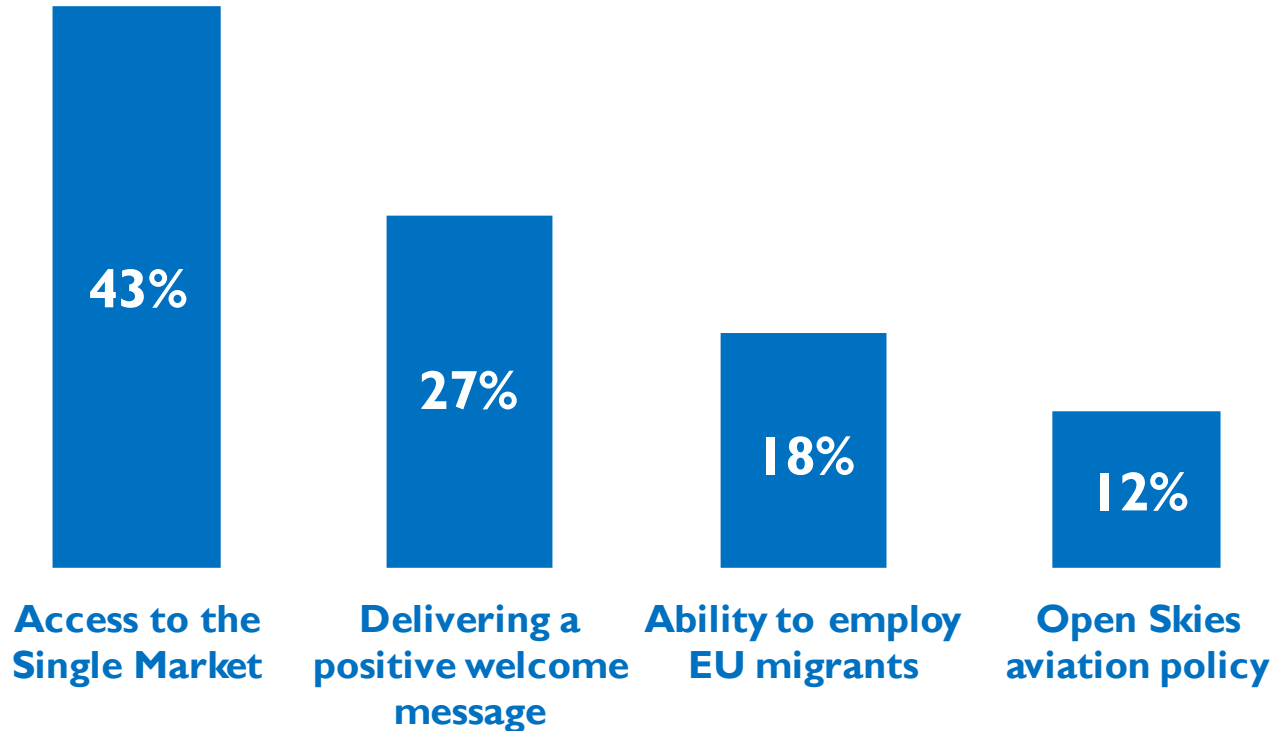
*“Have seen some quick reactions from US
& Europeans taking advantage of the
weaker pound”*
Service Provider

*“It's too early to see if there will be
any impact”*
Accommodation Provider

*“Groups were cancelled due to economical
uncertainty ”*
Tour Operator



Access to the single market seen as key priority for UK Government to negotiate with EU



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