



Business Barometer Survey 2016

Key Findings January 16



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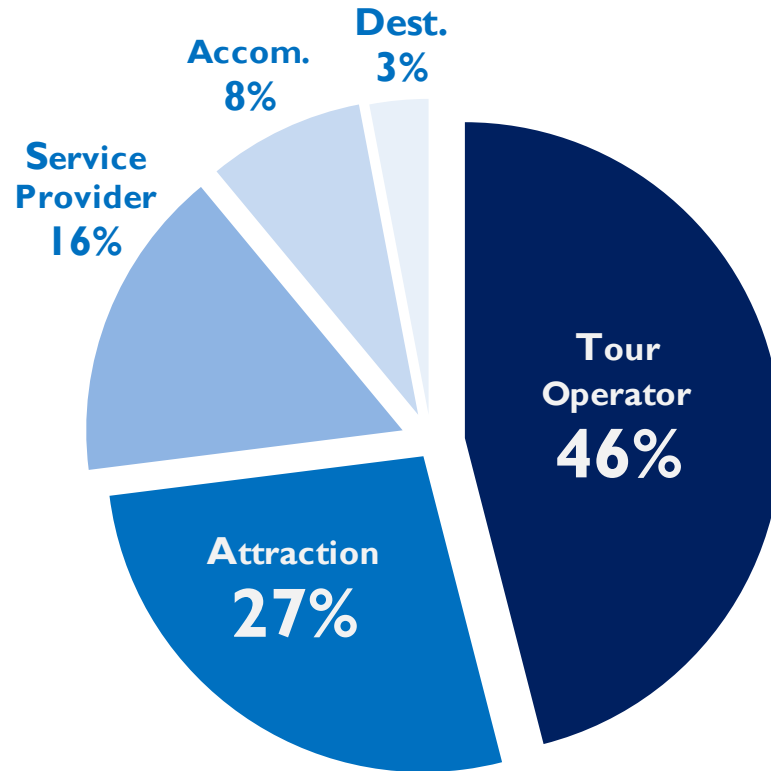


Aims & method

- **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 January 2016**
- **74 completed questionnaires – 22% of members**
- **Many thanks for taking part!**



Varied mix of sectors took part



Sample broadly reflective of membership breakdown.

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



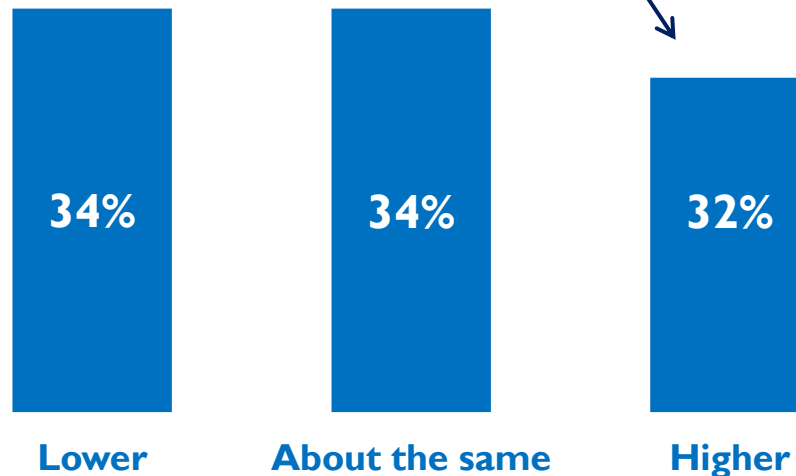
Q1. Which membership category do you fall into? Base: 74

Results

Bookings / visitor numbers in Nov & Dec increased for just under two-thirds compared to 2014

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

30%



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

15%

Increase most prominent amongst Tour Operators (38%) and Attractions (35%)

Over one third of Attractions (40%) and Service Providers (42%) stated 'lower'

Why did your bookings / visitor numbers increase?

“ATP finals in London, strong Thanksgiving, mild weather in December” **Attraction**

“As the business is now more established within the industry”
Service Provider

“Improved communication about discounted rates from previous year” **Attraction**



“Increased interest in Christmas shopping / festive events”
Tour Operator

“More interest from the USA”
Tour Operator

Why did your bookings / visitor numbers decrease?

“Exchange rate i.e. competition from other cheaper destinations”
Tour Operator

“Increased competition, strong GBP, less people on the streets, terrorism”
Attraction

“After Paris the decrease was more significant. School groups from Europe cancelled”
Service Provider

“Slow down in China”
Destination

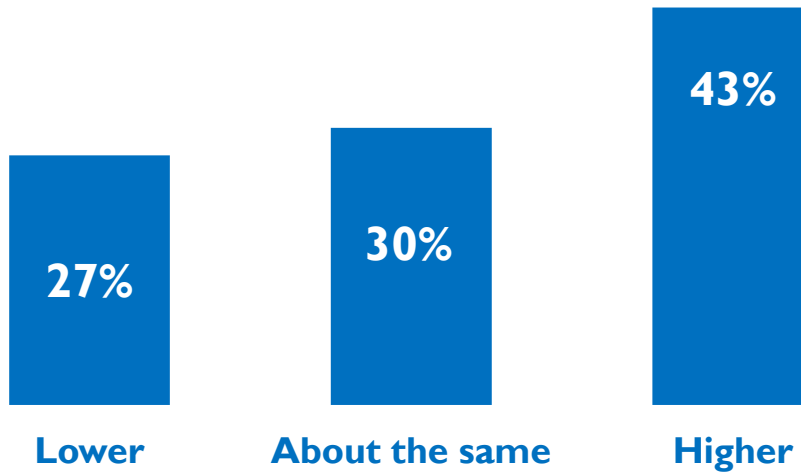
“Terrorist attacks in Paris”
Accommodation Provider



Revenue yield in Nov & Dec 15 increased for just under half of members compared to 2014

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

17%



Lower

About the same

Higher



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

14%

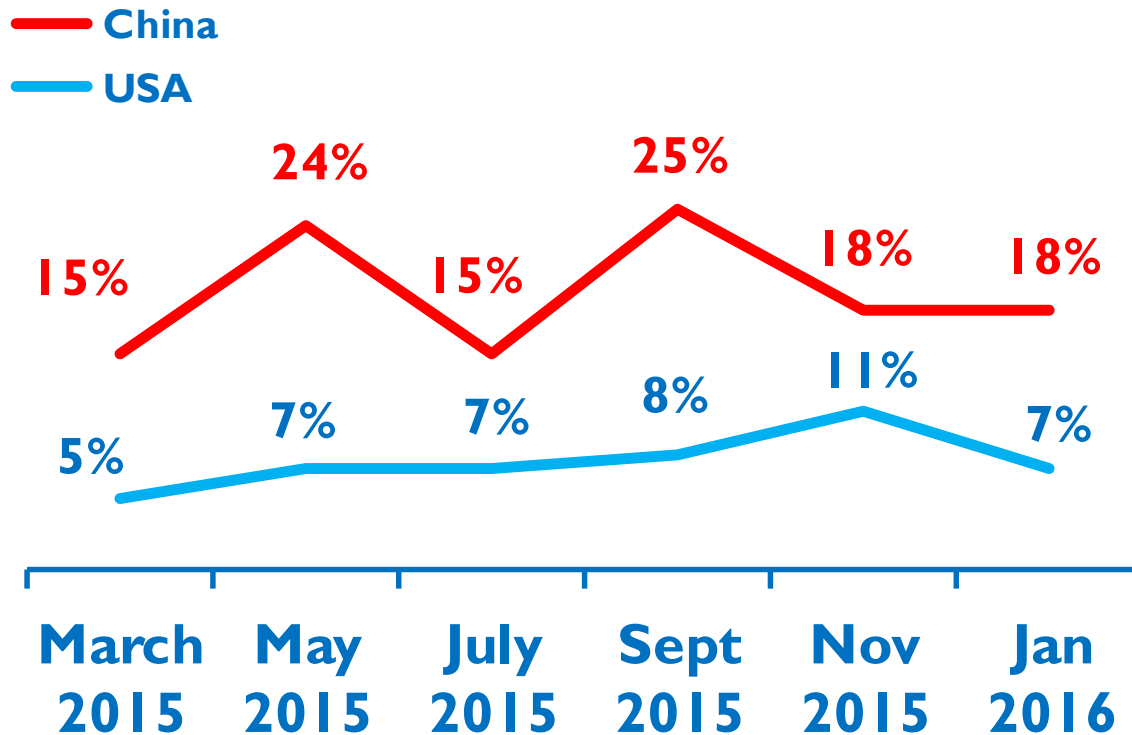
Increase most prominent amongst Attractions (50%) and Accommodation Providers (50%)



Q3. Compared with November and December in 2014, was your revenue yield for the same period in 2015: higher, about the same or lower? Base: 74



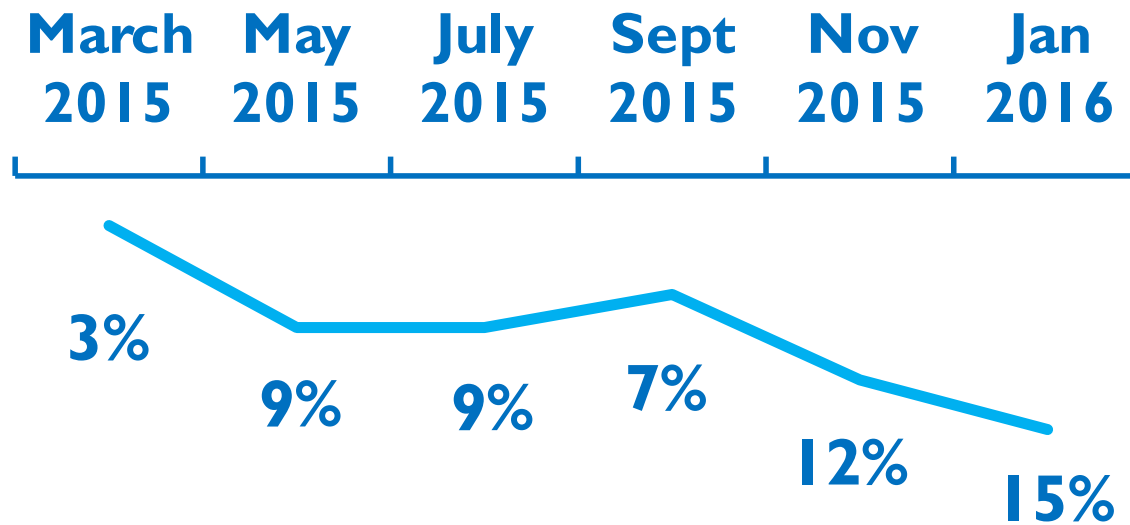
Since March 2015, China & USA have remained key growth markets



26%
currently not
experiencing
growth from any
overseas markets



Since March 2015, France has been a declining market

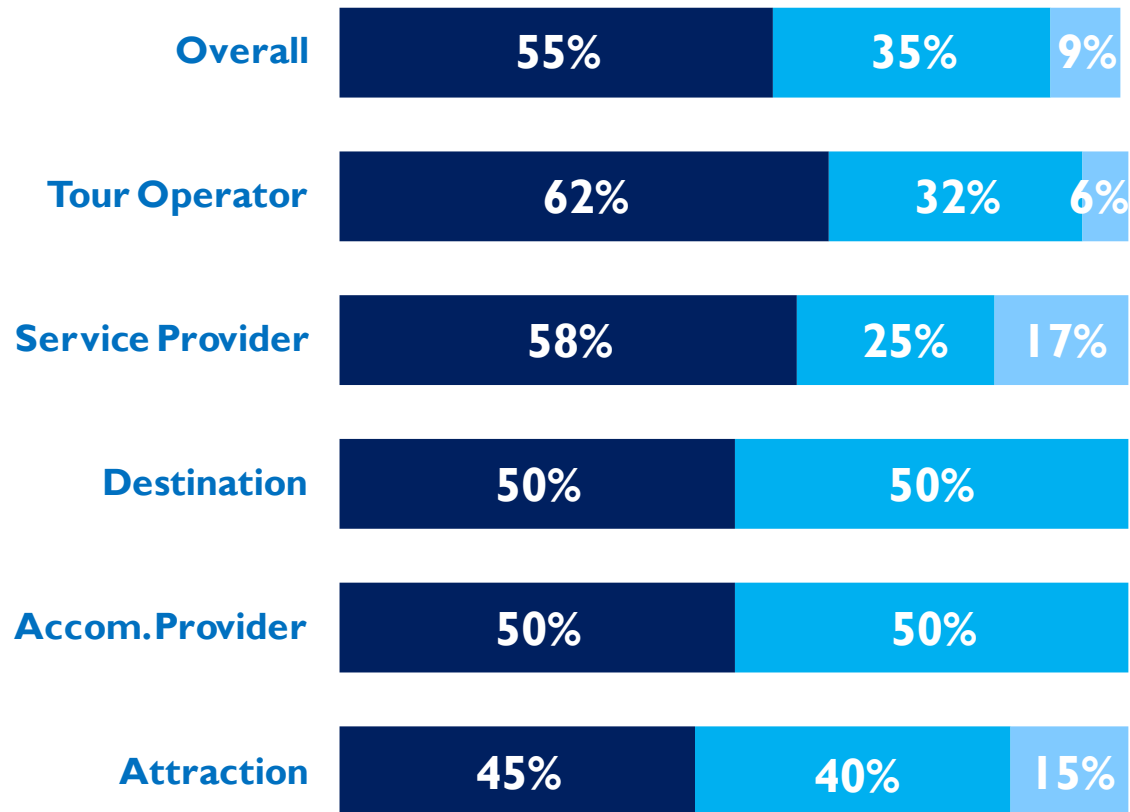


49%
currently not
experiencing
decline from any
overseas markets



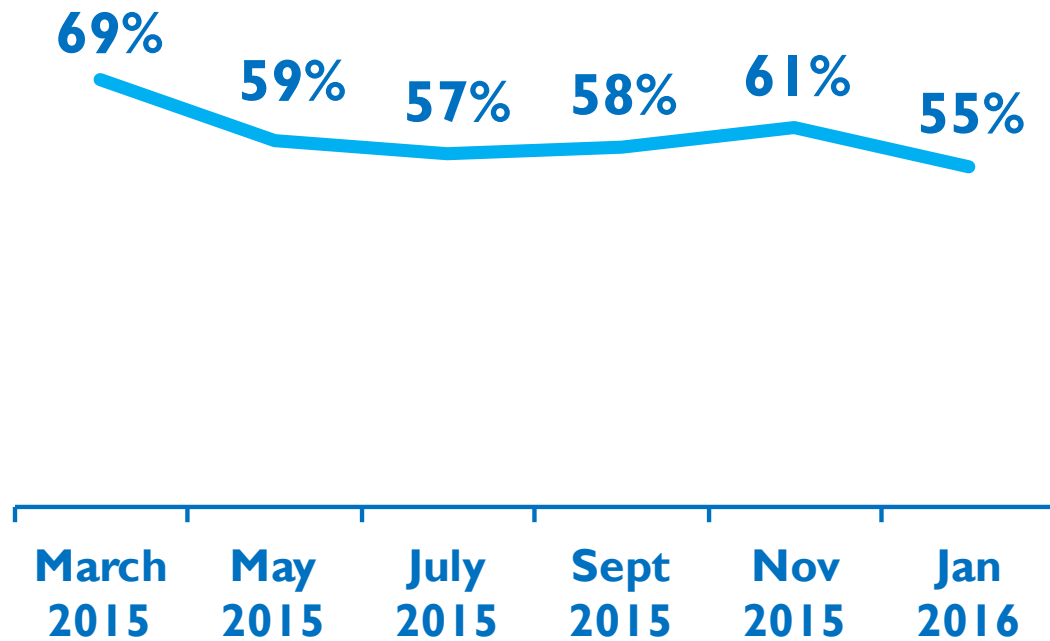
Q5. Please select the main market that you are currently experiencing decline in. Base: 74

Overall confidence levels in slight decline regarding bookings / visitor revenues over next 12 months



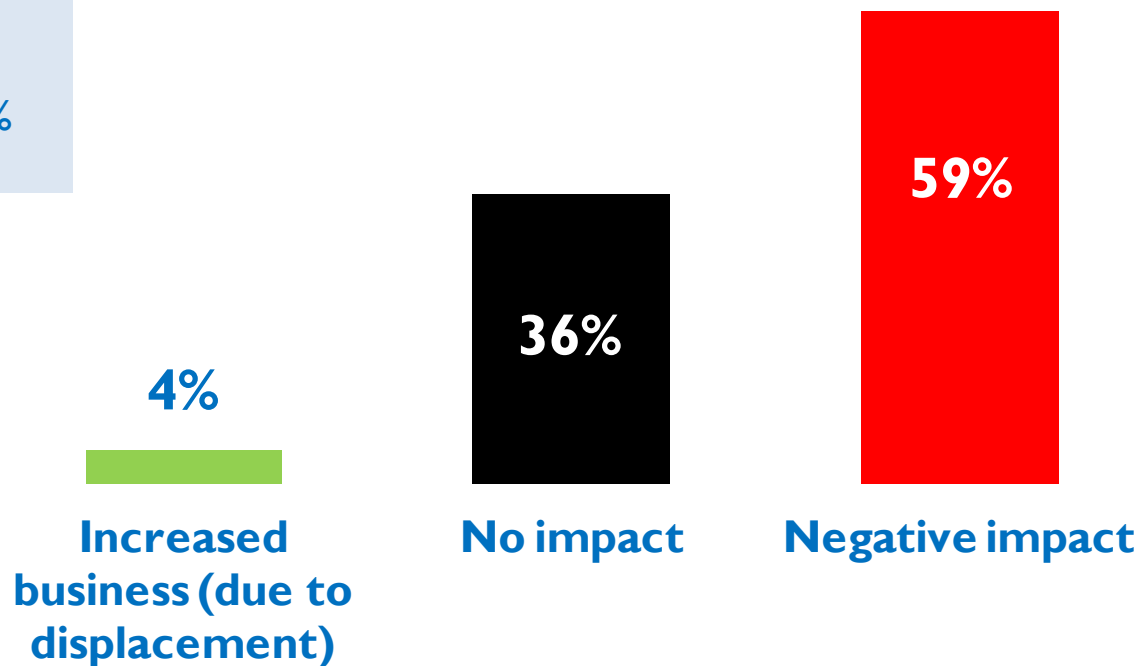
■ Confident ■ Neither confident nor unconfident ■ Unconfident

Since March 2015, confidence levels in slight decline regarding bookings / visitor revenues over next 12 months



Majority of members feel terrorism attacks in 2015 having a negative impact on bookings / visitor numbers

Just under half said that terrorist attacks had decreased their bookings / visitor numbers up to 10% (48%)



82% of members said that remaining part of the EU is important for their business.



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