



Business Barometer Survey 2017

Key Findings December 17



Mill House
North Street
York, YO1 6JD
Tel: 01904 632039



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 to members November 2017**
- **60 completed surveys – 15% of membership base**
- **Many thanks for taking part!**

Q1 Which of the following factors are likely to impact future bookings / visitor retention in either a positive or negative way over the next 12 months?

	Very positive	Positive	Mixed	Negative	Very negative
Air Passenger Duty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exchange rate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UK competitiveness with other destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VAT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Welfare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of UK tourism products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of visitors into the UK from overseas destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Airport capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GREAT campaign	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of what tourism generates to UK economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
UK infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

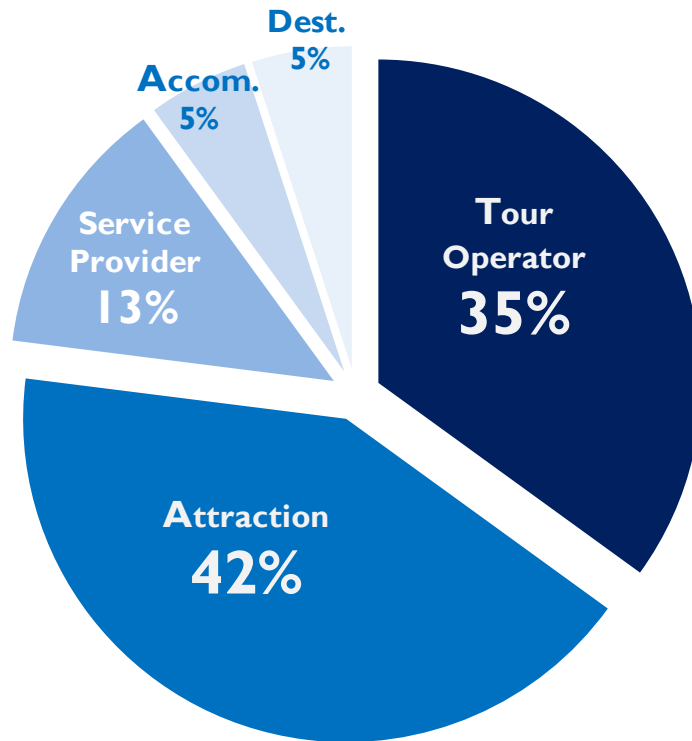
Go to completion

Back

Qa

MBE

Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



Q1. Which membership category do you fall into? Base: 60

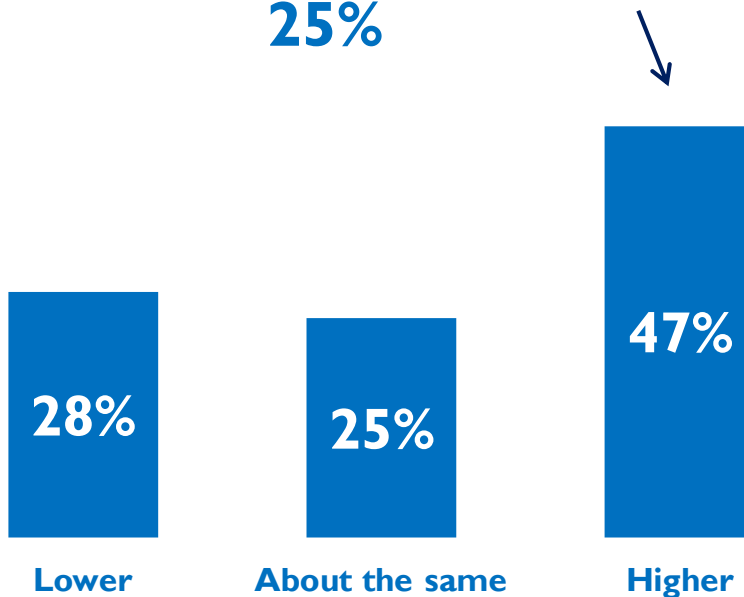


RESULTS

Bookings / visitor numbers / customer orders in Sept & Oct 17 higher for 47% of members compared to 2016

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

25%



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

18%

Many attractions struggled:
48% experienced a decline in visits.

But TOs had a busy early autumn:
62% saw an increase in bookings & only 14% a decrease.



Why did your bookings/visitor numbers/customer orders increase?

“Targeted marketing at overseas visitors.”
Service Provider

“Groups travelled with higher numbers.”
Accom. Provider



“Cruise ship passengers and successful half term.”
Attraction

“Strong volumes from USA.”
Tour Operator

Why did your bookings/visitor numbers/customer orders *decrease*?

“Lots of cancellations due to terror attacks .”
Service Provider

“Business has not bounced back after the Brexit vote and lower pound in a desired way.”
Tour Operator

“General uncertainty in central London.”
Attraction

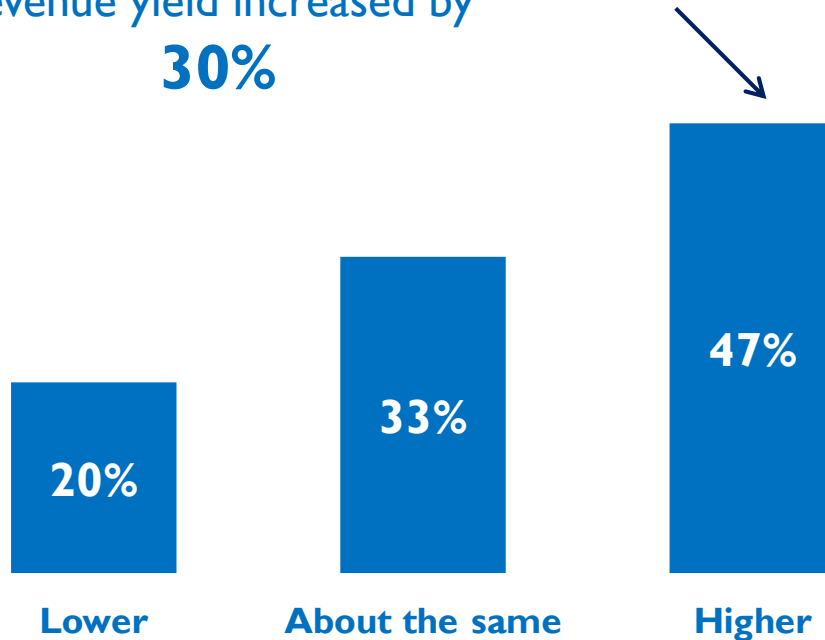


“Home market not coming to London .”
Attraction

Revenue yield in Sept & Oct 17 increased for 47% of members compared to 2016

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

30%



Lower

About the same

Higher



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

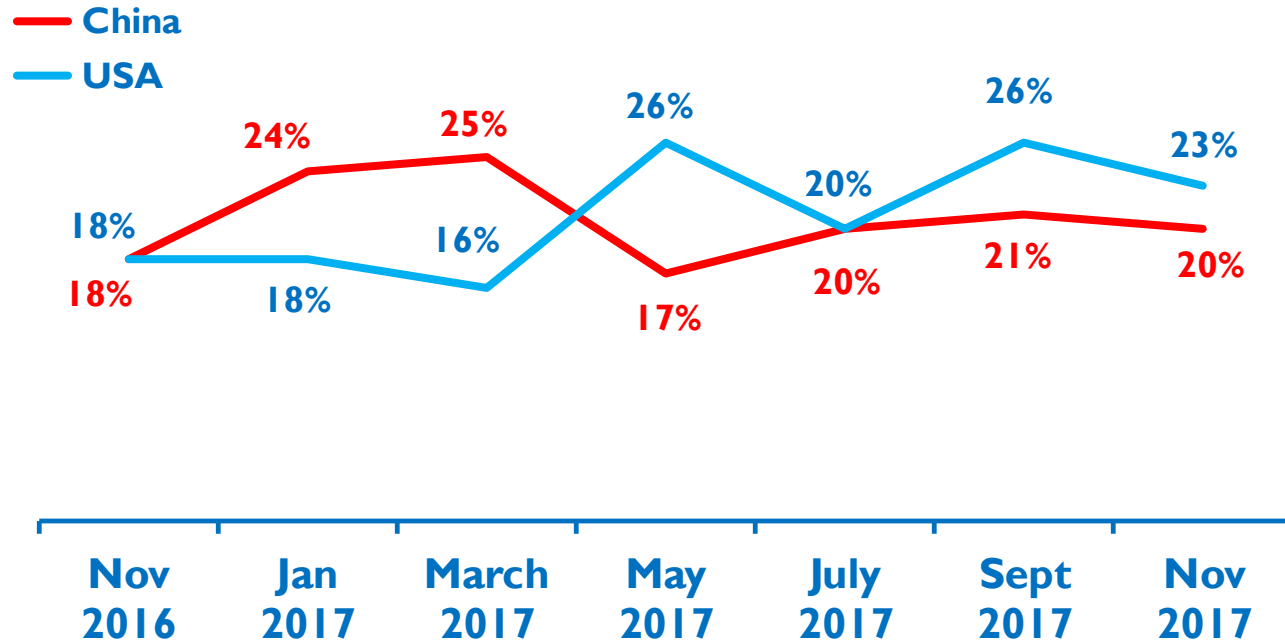
18%

Amongst attractions, higher proportion reported revenue growth: 40% experienced an increase in revenue, 32% same & 28% a decrease.

Decent early autumn for TOs: 52% with increase in revenue & only 14% reporting a decrease.



USA remains as main growth market but dipped slightly



25%
Not experiencing growth from any overseas markets.



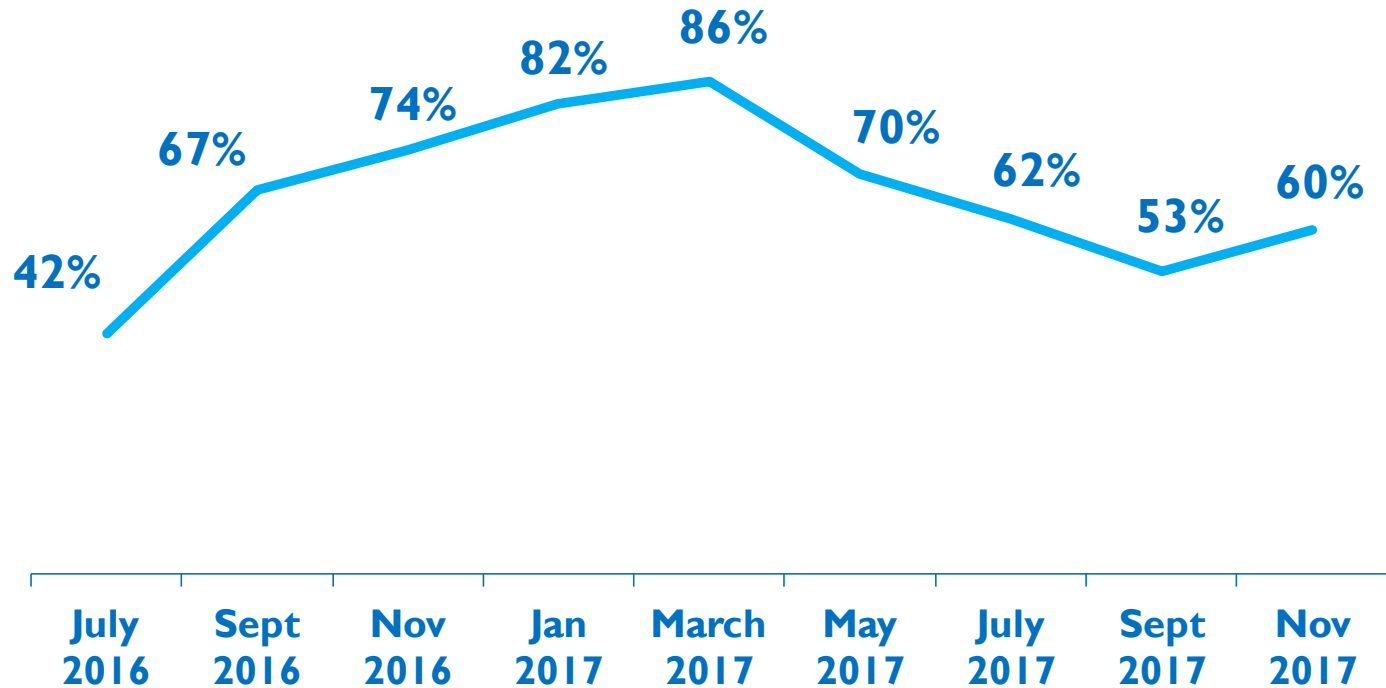
France returns as main declining market



55%

Not experiencing
decline from any
overseas markets.

Confidence in future business levels sees small increase



Reasons for feeling *confident* about the next 12 months...

“Forward bookings already looking good, feedback from overseas clients remains optimistic.”
Service Provider

“Making inroads with China through partnership agreement.”
Destination

“Exchange rates don't look set to rise.”
Accom. Provider

“Good interest from clients at events such as WTM and GEM.”
Attraction

“Expect GBP to stay weak.”
Tour Operator



Reasons for feeling *less confident* about the next 12 months...

“Impact of political and economic uncertainty.”
Service Provider

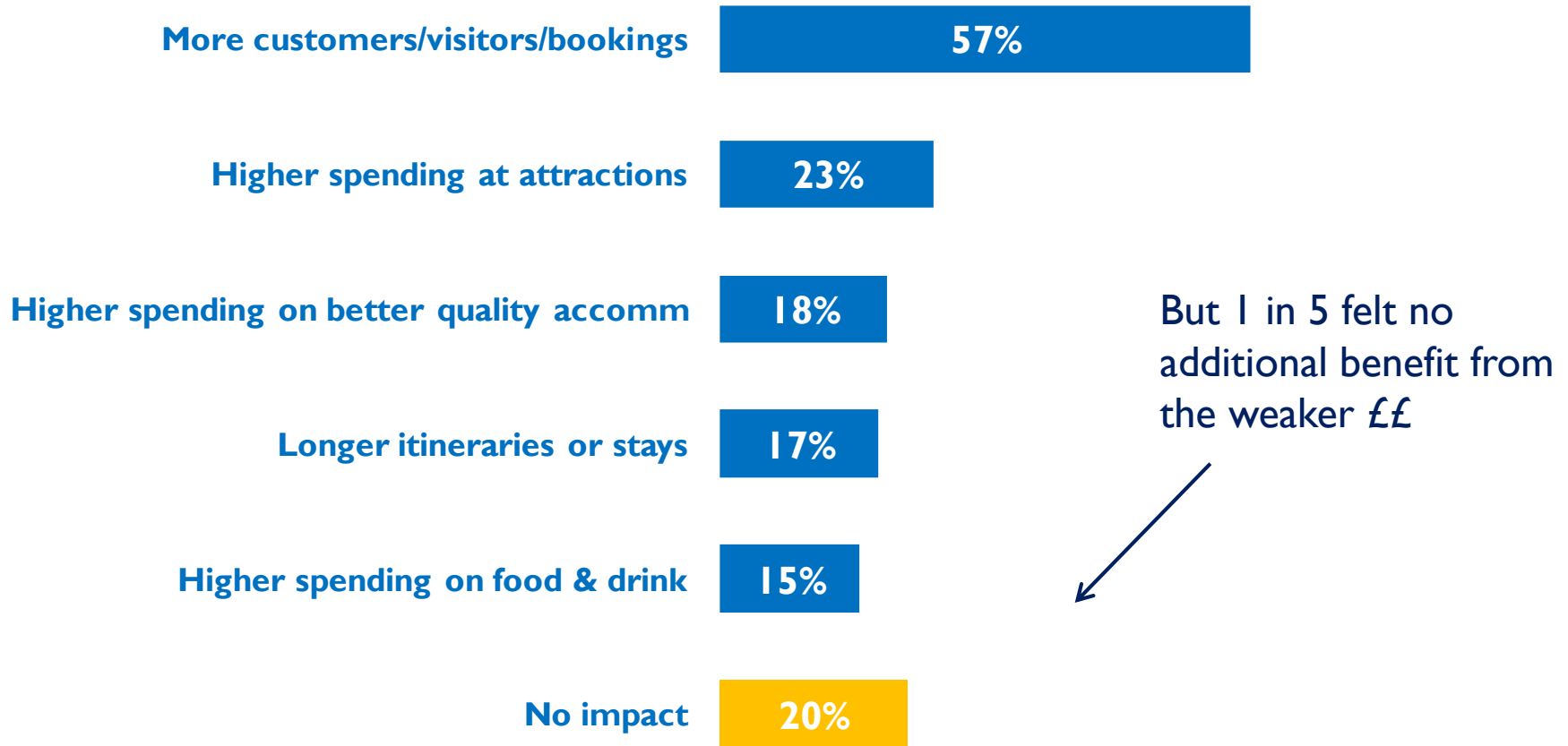
“Suppliers have increased their prices.”
Tour Operator



“Too many uncertainties with Brexit, exchange rate and security fears.”
Attraction

“The Brexit uncertainty continues.”
Tour Operator

Favourable exchange rate triggered increase in visitors and spend





Contact ...

Richard Bryan

richard.bryan@qaresearch.co.uk

01904 632039

www.qaresearch.co.uk

