



Business Barometer Survey 2017

Key Findings

March 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 out to members during March 2017**
- **64 completed questionnaires – 17% of members**
- **Many thanks for taking part!**

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

	Very positive	Positive	Balanced or 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"/>
Welcome	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of UK tourism product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of routes 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 other tourism generated in 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"/>

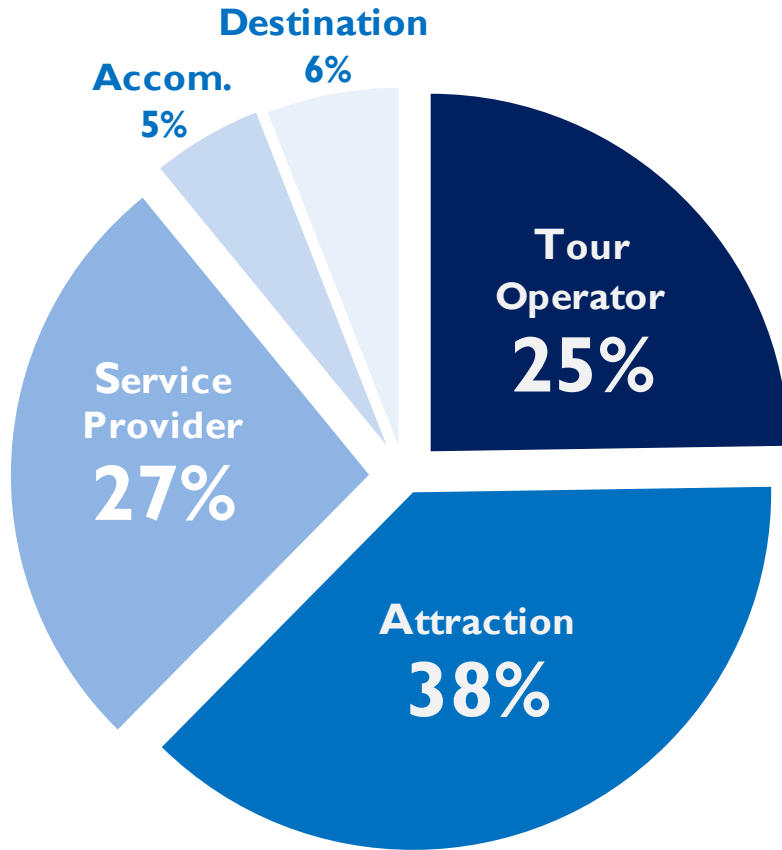
20% completed

PREVIOUS NEXT

Qa Research Ltd
115 The Quadrant, Leeds LS2 9JF
Tel: 0113 275 1234 Fax: 0113 275 1235 Email: info@qa-research.co.uk
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Qa Research FACTORY

Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



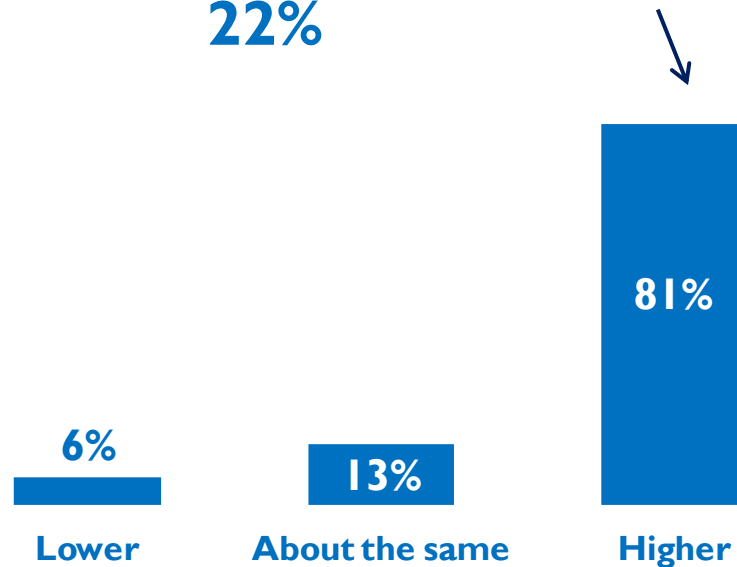
Q1. Which membership category do you fall into? Base: 64

Results

Bookings / visitor numbers in Jan & Feb 17 higher for 81% of members compared to 2016

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

22%



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

11%



Why did your bookings / visitor numbers increase?

“Chinese New year fell in January 2017. Low exchange rate for GBP”
Tour Operator

“Growth in the Chinese travel market”
Service Provider

“Renewed confidence and better appetite from overseas market for travel in general”
Destination



“Big increase in domestic market. Some overseas markets also showing signs of growth”
Attraction

“Weak pound plus more confidence in travel compared to early 2016 after terror attacks in Paris/Brussels”
Attraction

Why did your bookings / visitor numbers *decrease*?

“Competitive market”
Tour Operator

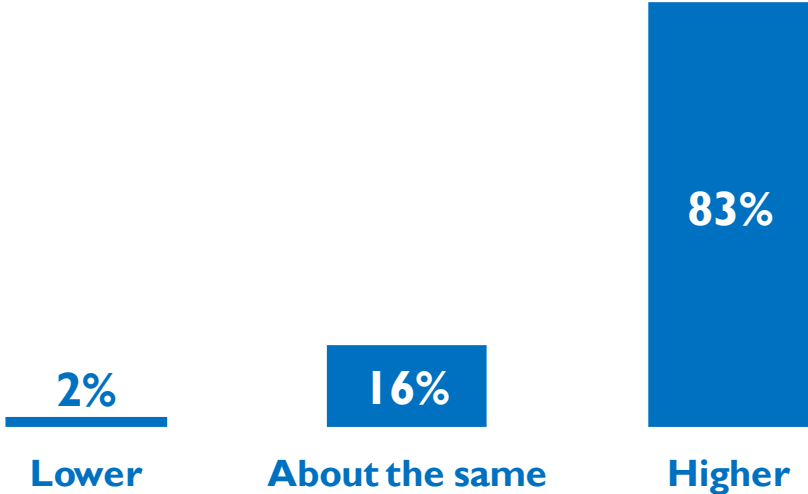
“We lost a major client”
Tour Operator



“Decision making process taking longer ”
Tour Operator

Revenue yield in Jan & Feb 17 increased for over half of members compared to 2016

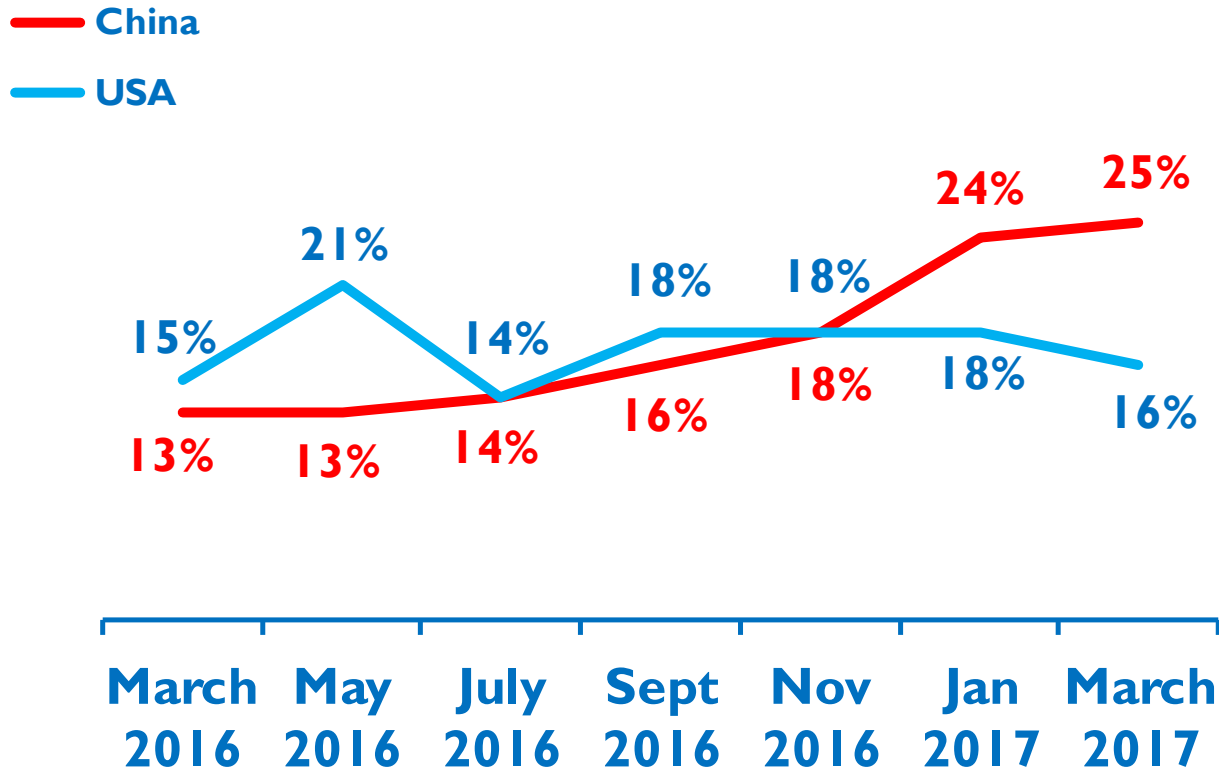
For those who selected higher, on average, revenue yield increased by **23%**



For those who selected lower, on average, revenue yield decreased by **2%**



China continues to rise as the main growth market whilst USA takes a slight dip



11% currently not experiencing growth from any overseas markets



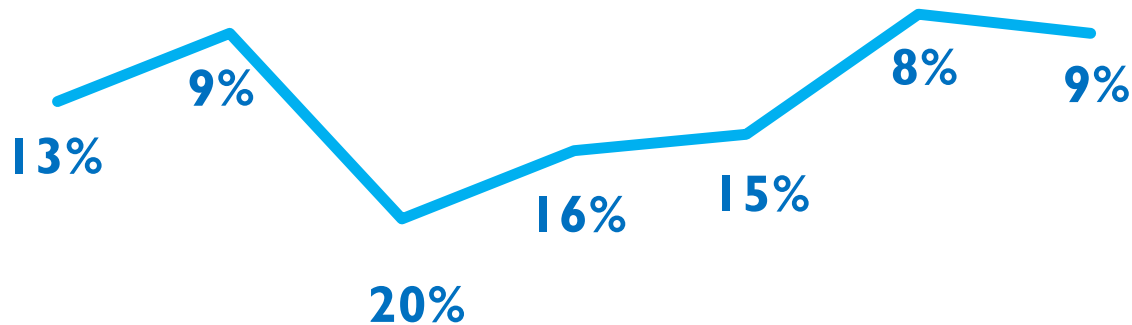
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Q4. Please select the main market that you are currently experiencing growth in. Base: 64



France remains the main declining market

March 2016 May 2016 July 2016 Sept 2016 Nov 2016 Jan 2017 March 2017

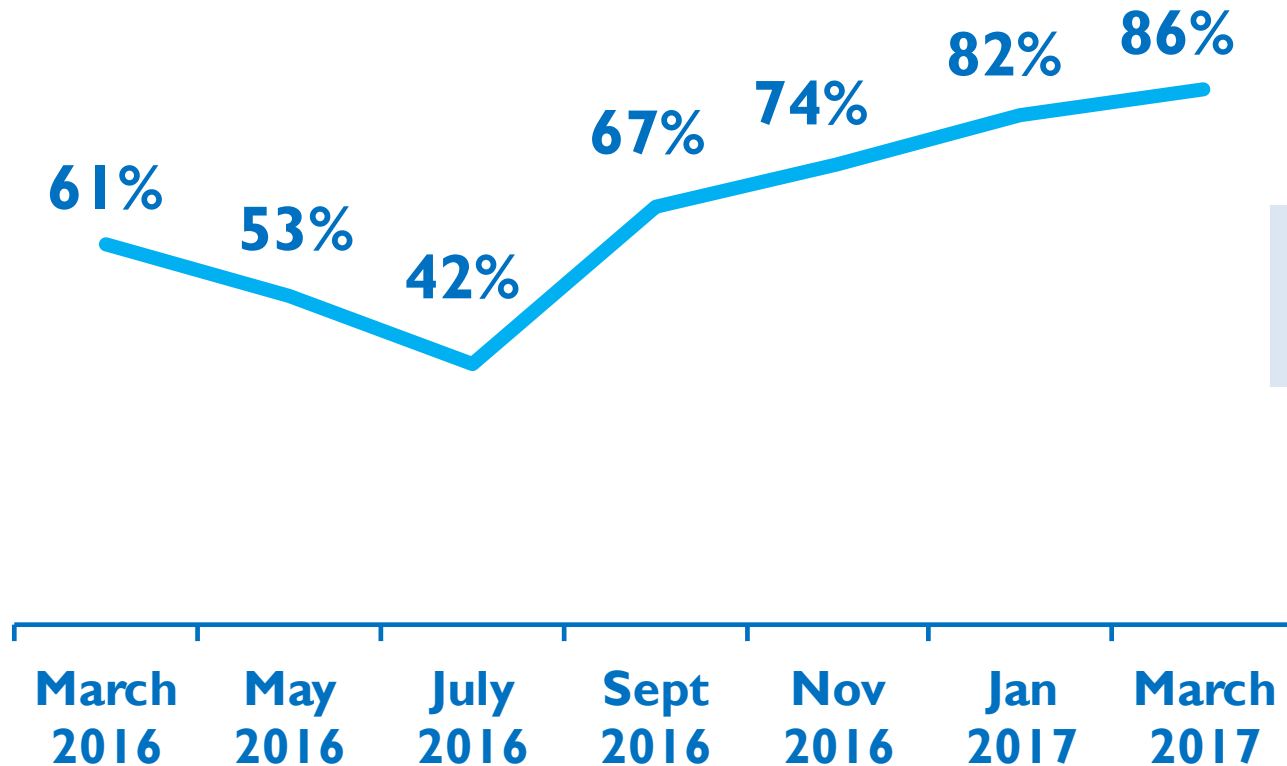


52%
currently not
experiencing
decline from any
overseas markets



Q5. Please select the main market that you are currently experiencing decline in. Base: 64

Confidence levels carry on increasing regarding bookings / visitor revenues over next 12 months



Confidence highest amongst Tour Operators (100%)

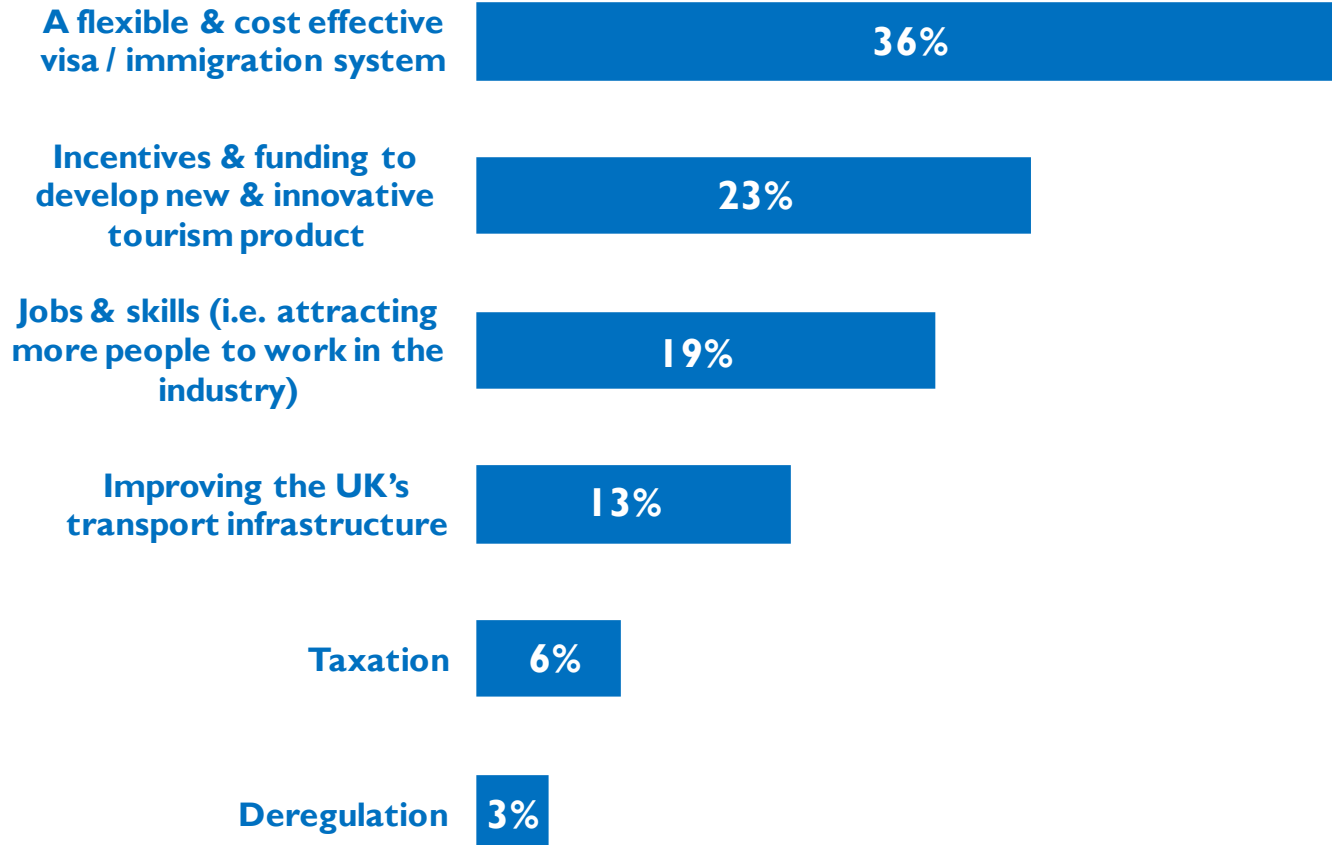


78% of members agreed that there should be a 'sector deal' for tourism



For more information on sector deals
and the government's industrial strategy
[please click here](#)

Flexible, cost effective visa/immigration system a key priority





Contact ...

Tom Ratcliffe

tom.ratcliffe@qaresearch.co.uk

01904 632039

www.qaresearch.co.uk

