



# Business Barometer Survey 2017

## Key Findings

October 17



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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 September 2017**
- **53 completed questionnaires – 15% of membership base**
- **Many thanks for taking part!**

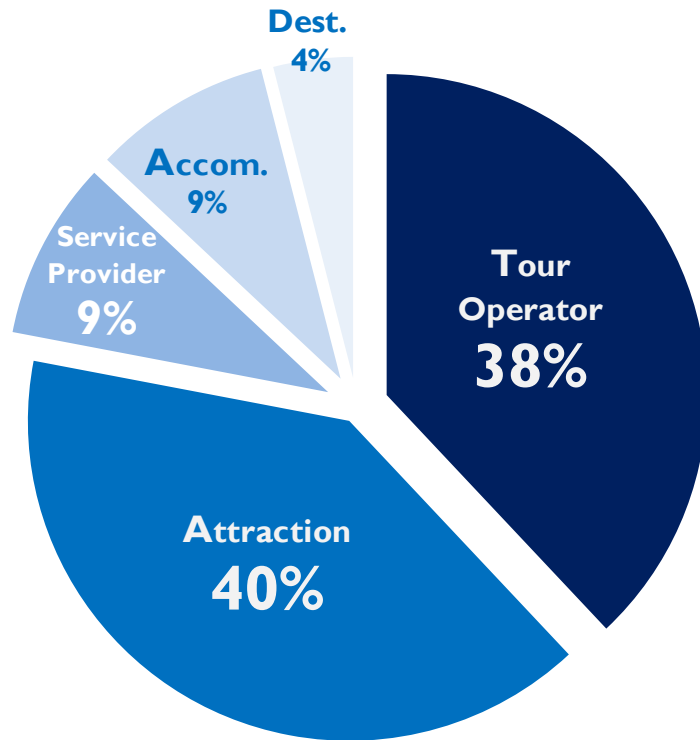
Q7. Which of the following factors are likely to impact future bookings / visitor revenue to either a positive or negative one over the next 12 months?

	Very positive	Positive	Neutral 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"/>
Welfare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment 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"/>
Assessment of value 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"/>

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Qa RESEARCH

# Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



Q1. Which membership category do you fall into? Base: 53

Results

# Bookings / visitor numbers in July & Aug 17 higher for 47% of members compared to 2016

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

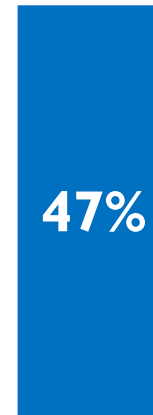
**22%**



Lower



About the same



Higher

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

**17%**



**Polarised summer for attractions:**  
38% experienced an increase in bookings & 38% a decrease

**Decent summer for TOs:**  
55% saw an increase in bookings & only 25% a decrease



# Why did your bookings / visitor numbers increase?

*“Low price of sterling.”*  
**Accom. Provider**

*“New partners signed & increased market share from existing partners.”*  
**Service Provider**

*“Low pound is helping with overseas visitors, as it is with 'staycationers'. We have seen marked increase in visitors from other UK regions.”*  
**Destination**



*“Brexit, weak pound.”*  
**Attraction**

*“Increased interest from North America.”*  
**Tour Operator**

# Why did your bookings / visitor numbers *decrease*?

*“Higher costs in the F&B industry. Brexit fears, terrorism.”*  
**Service Provider**

*“Weak demand due to geopolitical issues.”*  
**Tour Operator**

*“Insecurity over terror incidents. Strong competition from other markets.”*  
**Tour Operator**

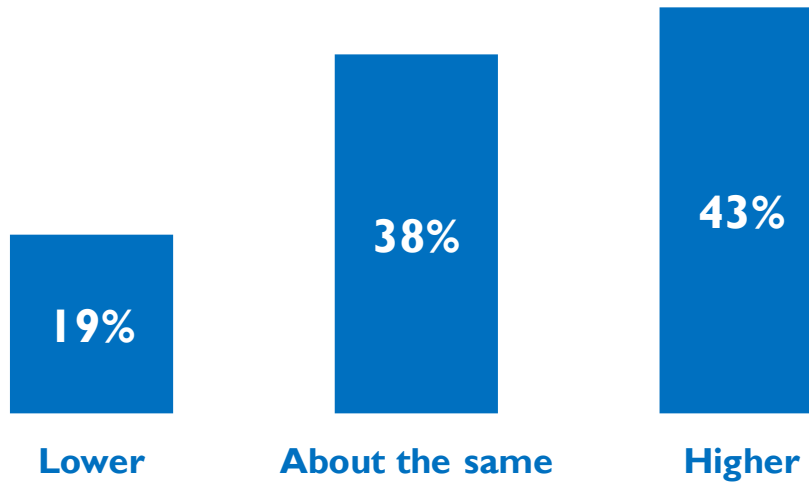


*“Major works & redevelopment on site, general dip in confidence from tourists with increase in terrorism & locally, issues with Southern Rail strikes.”*  
**Attraction**

# Revenue yield in July & Aug 17 increased for 43% 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

**17%**

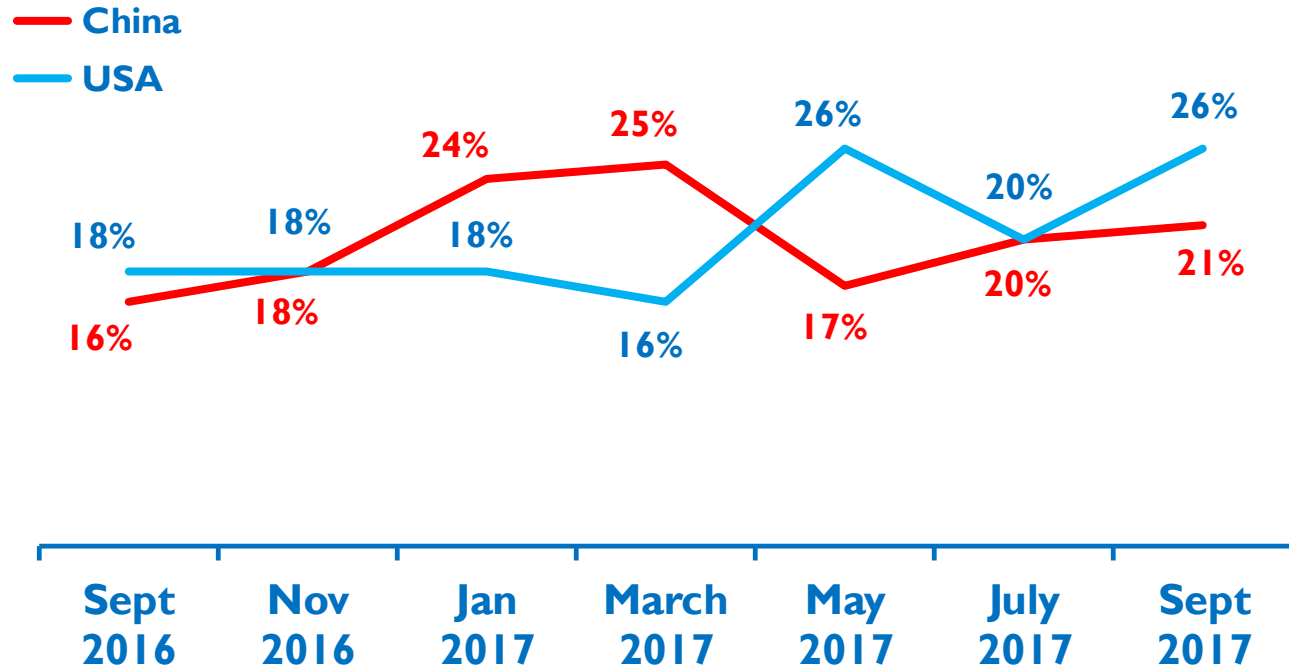
**Mixed summer for attractions:**  
29% experienced an increase in revenue, 43% same & 29% reporting a decrease

**Lucrative summer for TOs:**  
60% with increase in revenue & only 10% reporting a decrease





# USA main growth market along with small rise from China



**21%**  
currently not experiencing growth from any overseas markets

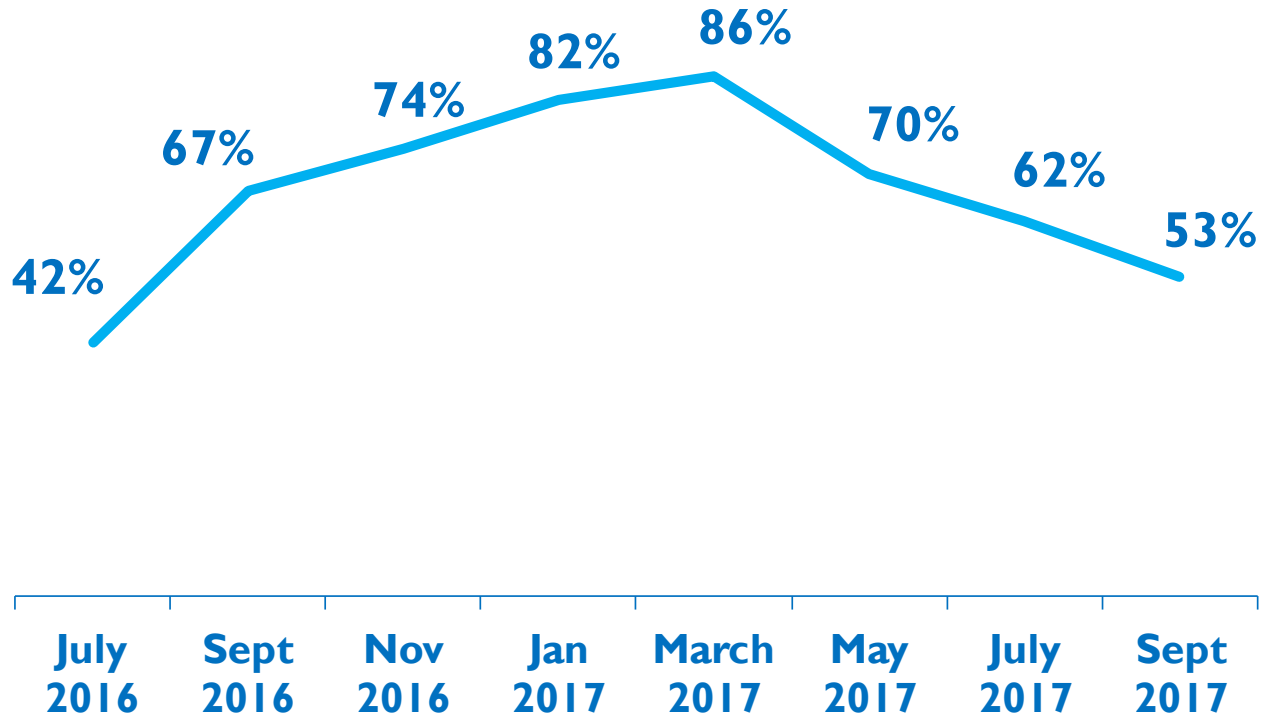


# Germany replaces France as main declining market



**51%**  
currently not  
experiencing  
decline from any  
overseas markets

# Confidence in future bookings & revenues lowest since Sept 2016





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