



Business Barometer Survey 2017

Key Findings

May 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 May 2017**
- **66 completed questionnaires – 17% of members**
- **Many thanks for taking part!**

Q7. 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	Makes no impact	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"/>

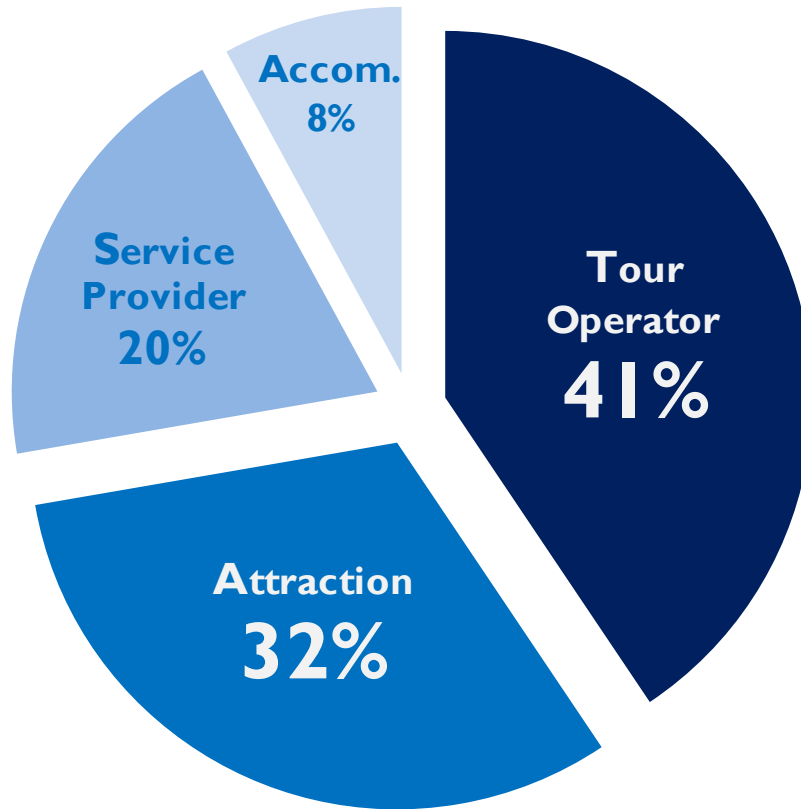
20% Complete

PREVIOUS NEXT

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GREAT FACTORS

Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



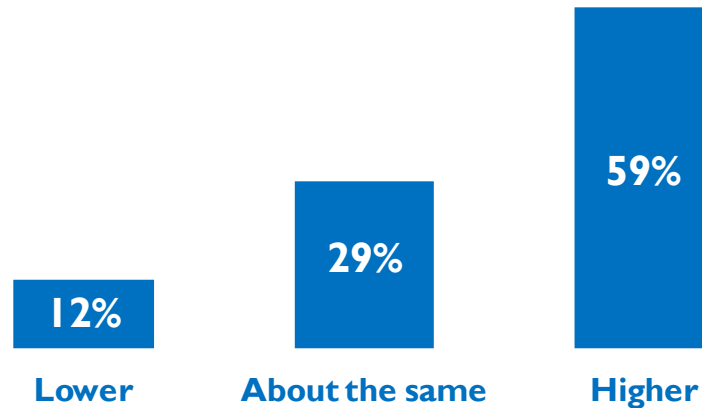
Q1. Which membership category do you fall into? Base: 66

Results

Bookings / visitor numbers in April & March 17 higher for 59% of members compared to 2016

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

28%



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

27%



Why did your bookings / visitor numbers increase?

“Weaker pound?! We have increased our promotion and hence gained a larger market share”

Tour Operator

“More communication to buyers”

Service Provider

“Strong demand across all areas of the UK”

Accom. Provider



“Stronger Easter campaign coupled with dry weather”

Attraction

“We have offices in China, we visited our clients) in January, and talk to them face to face regarding the collaboration. We offer the competitive rates and professional service to our partners”

Tour Operator

Why did your bookings / visitor numbers *decrease*?

“Price competition”
Tour Operator

“Easter dates”
Tour Operator



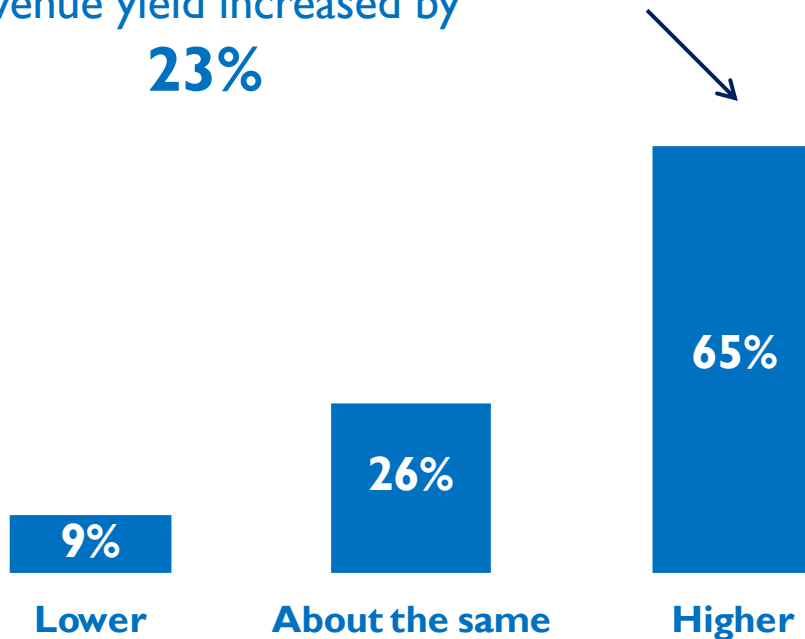
“Increased price”
Attraction

“Continental school groups still considerably down as French authorities have banned visits to churches and shopping centres”
Attraction

Revenue yield in March & April 17 increased for two thirds of members compared to 2016

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

23%

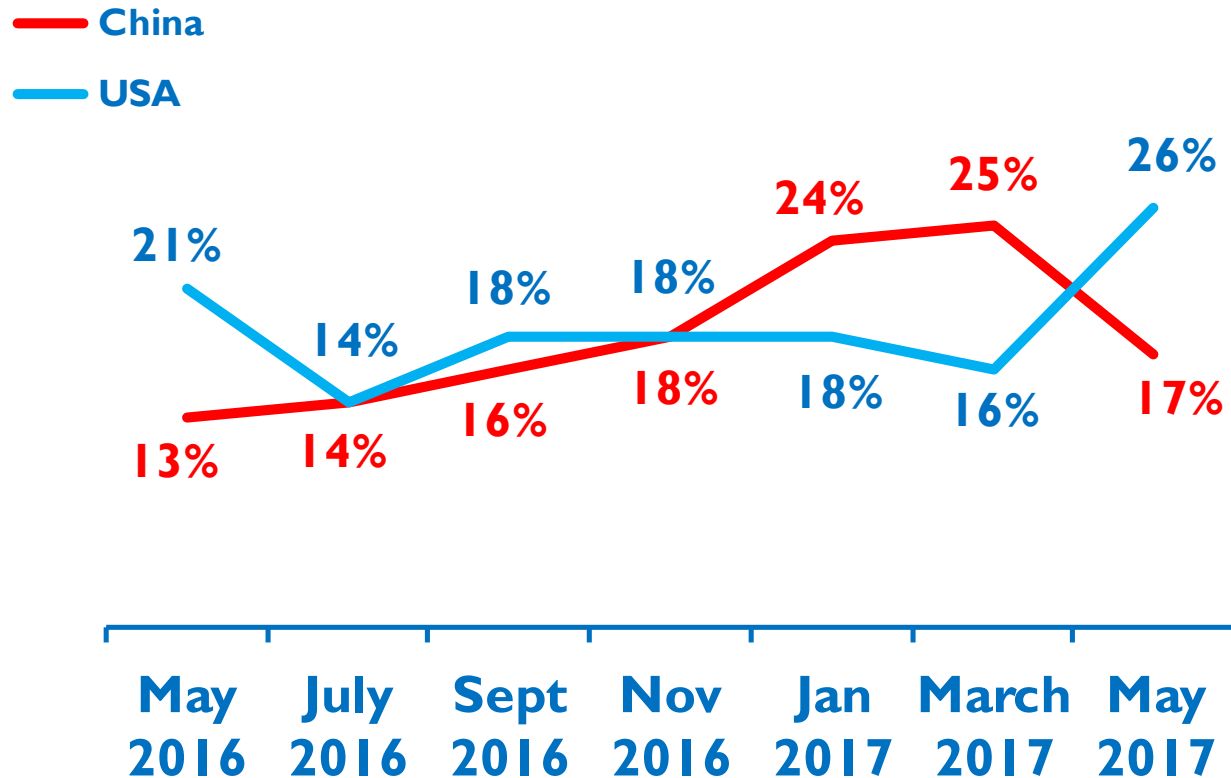


For those who selected lower, on average,
revenue yield decreased by

31%



USA becomes main growth market as China dips

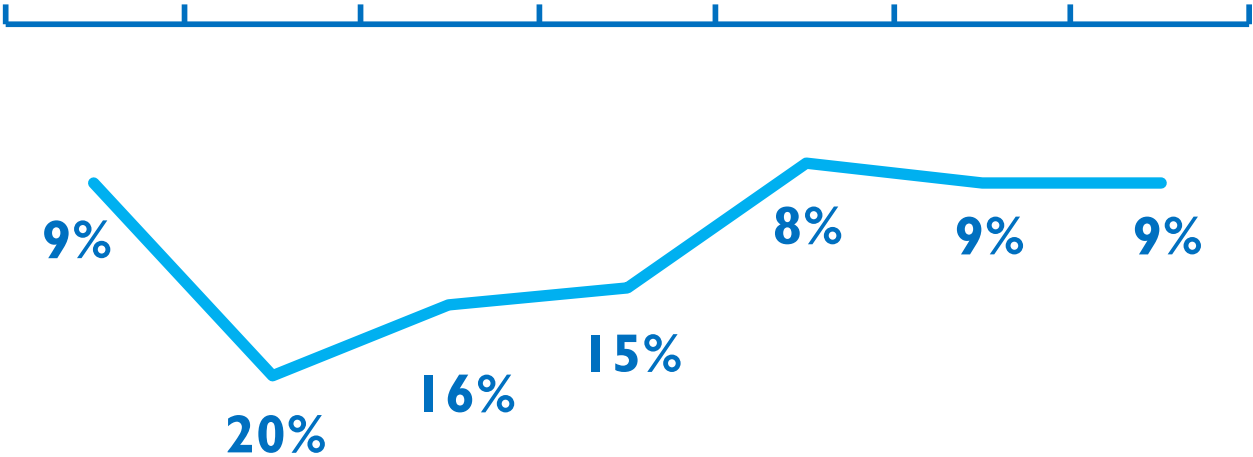


21%
currently not experiencing growth from any overseas markets



France remains the main declining market

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

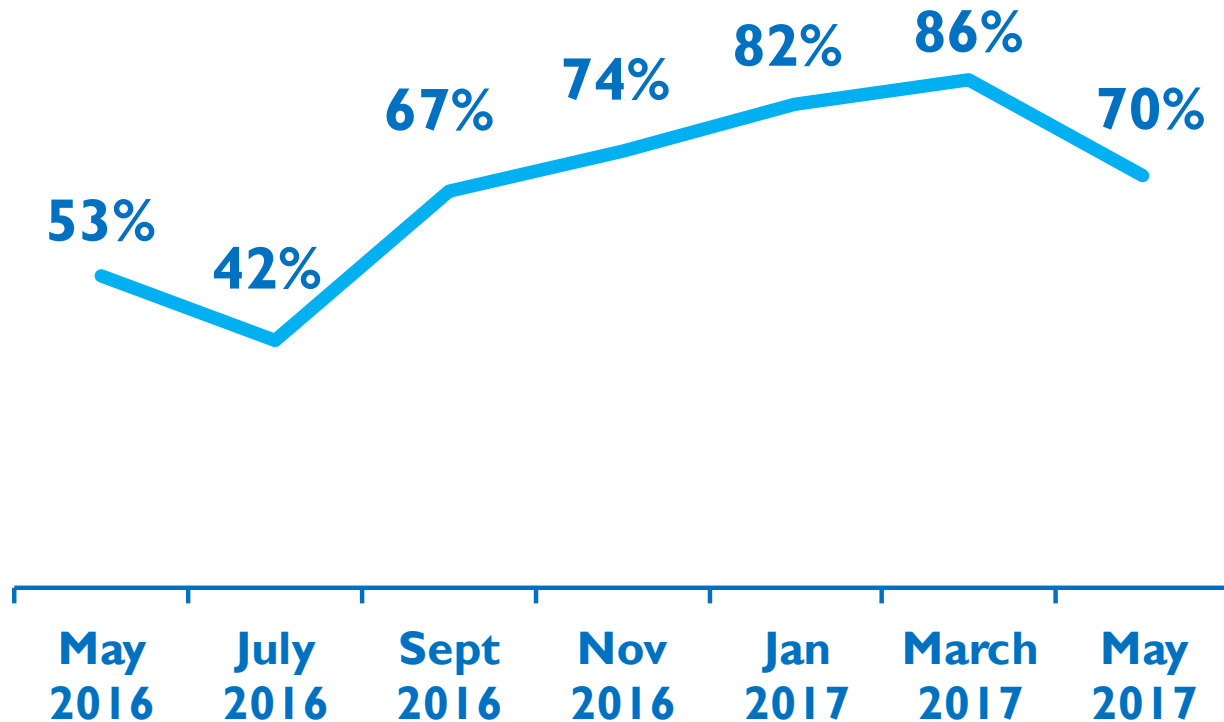


53%
currently not experiencing decline from any overseas markets



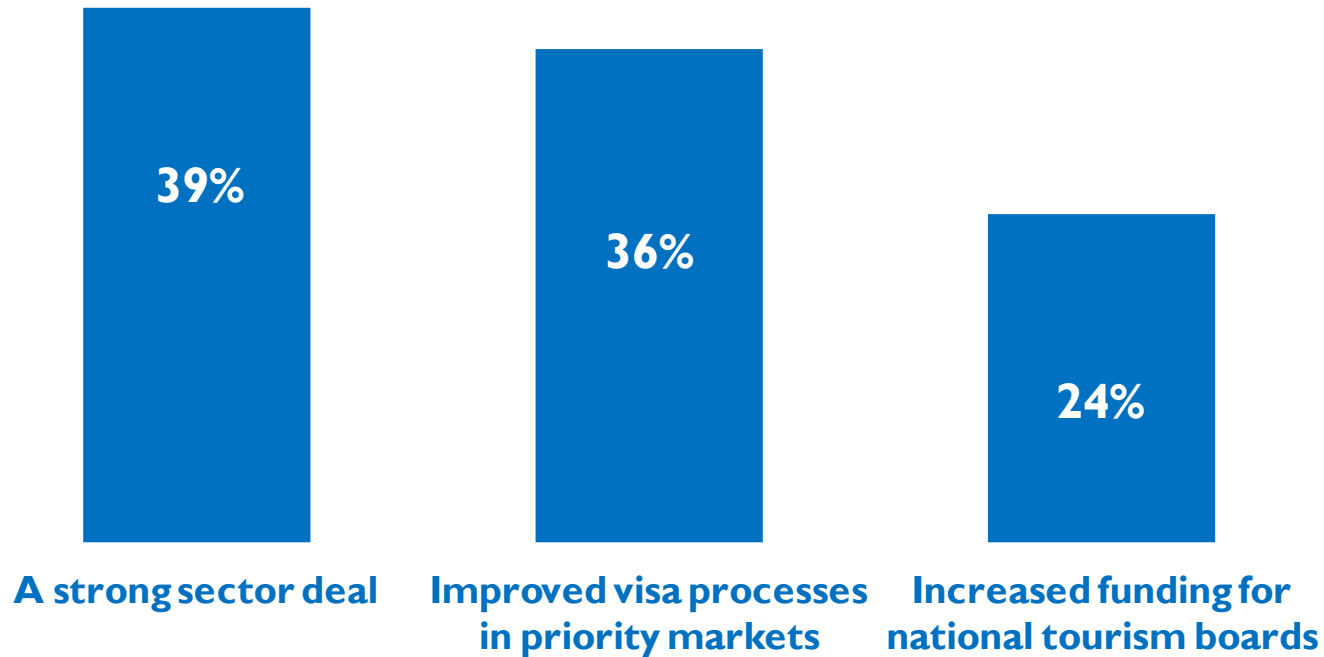
Q5. Please select the main market that you are currently experiencing decline in. Base: 66

Confidence levels still high but take a slight dip regarding bookings / visitor revenues over next 12 months



Confidence highest amongst Attractions (81%) & Accom. Providers (80%)

Strong sector deal & improved visa processes should be the new government's priorities for tourism



86% of members said that the UK's impending withdrawal from the EU has not affected their ability to employ staff from the EU





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