



# Business Barometer Survey 2017

## Key Findings

July 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 July 2017**
- **69 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"/>

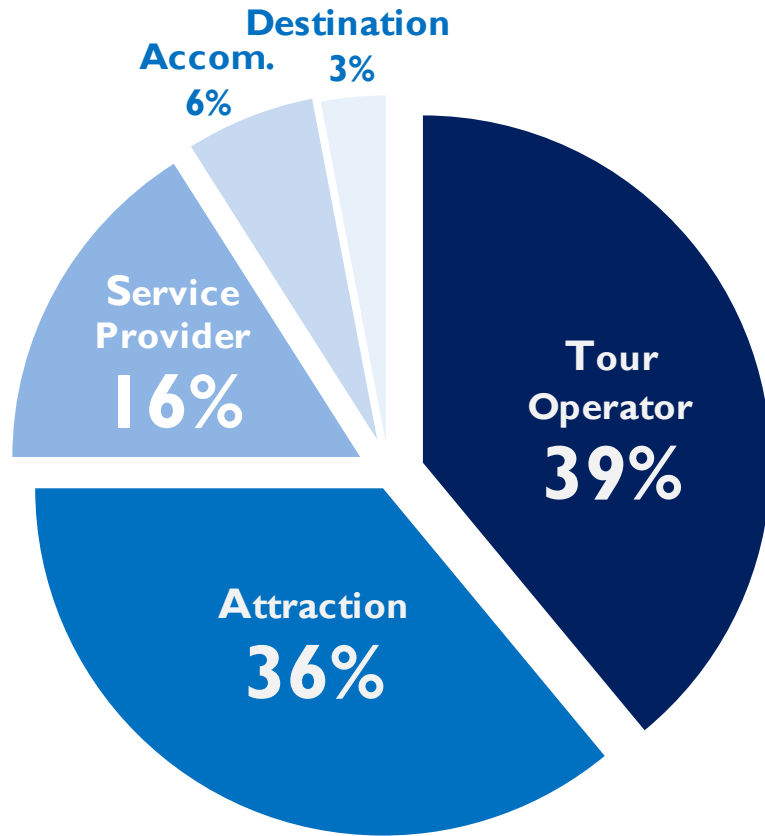
20% Complete

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GREAT FACTORY

# Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



Q1. Which membership category do you fall into? Base: 69

Results

# Bookings / visitor numbers in May & June 17 higher for 58% 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

**15%**



# Why did your bookings / visitor numbers increase?

*“Staycations & increase in guests form abroad”*  
**Accom. Provider**

*“Better promotion, weak pound”*  
**Service Provider**

*“Increased marketing & weather”*  
**Destination**



*“2016 was a very bad year for us due to terrorism”*  
**Attraction**

*“New products, better marketing and networking and a general increase in US Visitors”*  
**Tour Operator**

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

*“Price competition”*  
**Tour Operator**

*“Easter dates”*  
**Tour Operator**



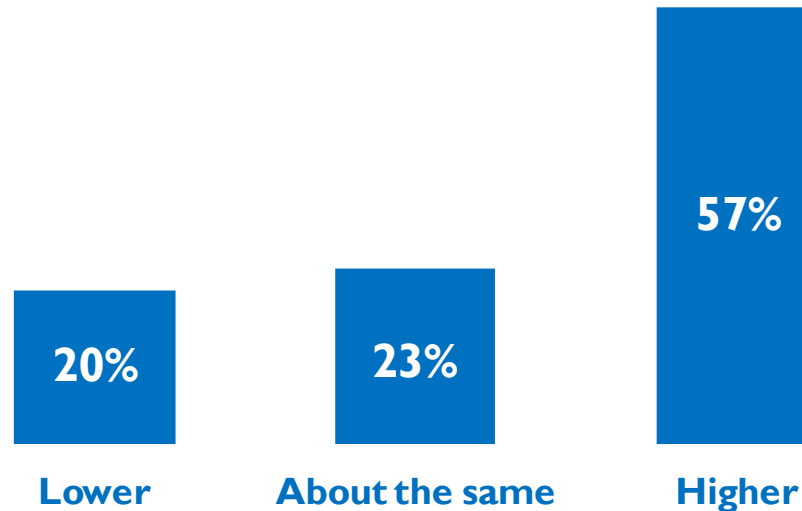
*“Increased price”*  
**Attraction**

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

# Revenue yield in May & June 17 increased for 57% of members compared to 2016

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

**23%**



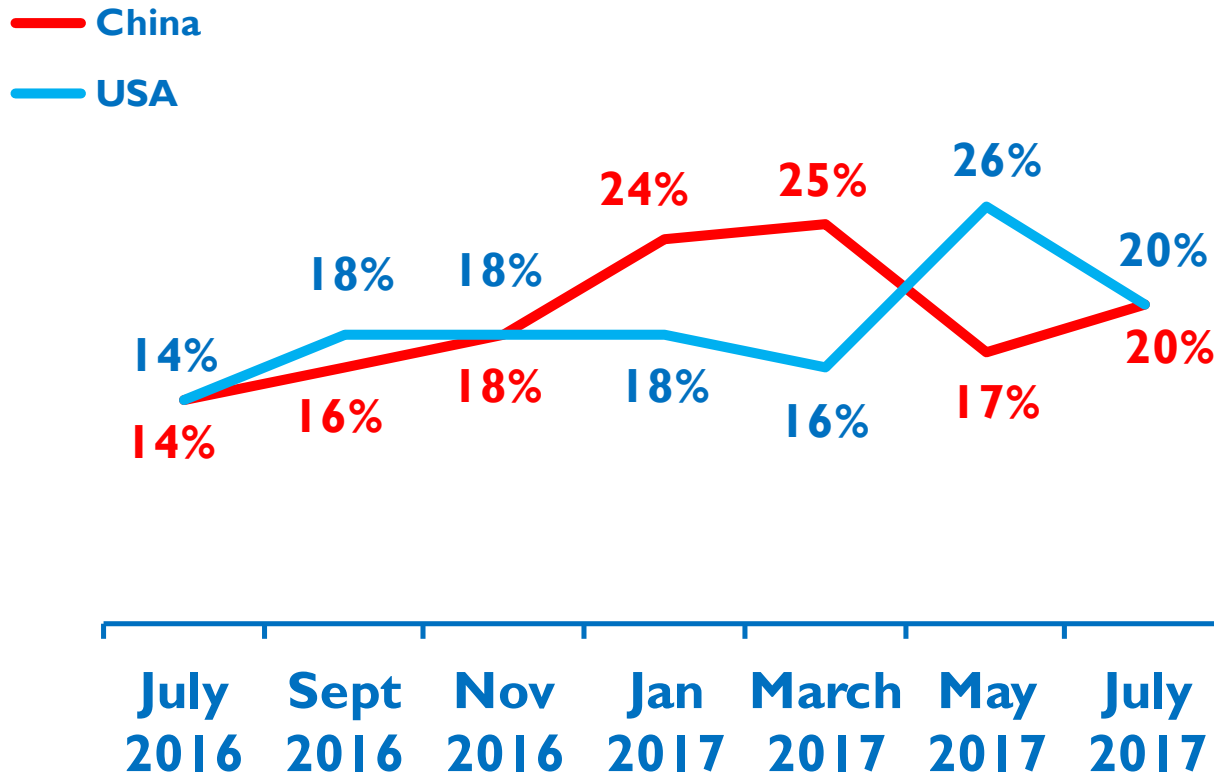
For those who selected lower, on average,  
revenue yield decreased by

**15%**





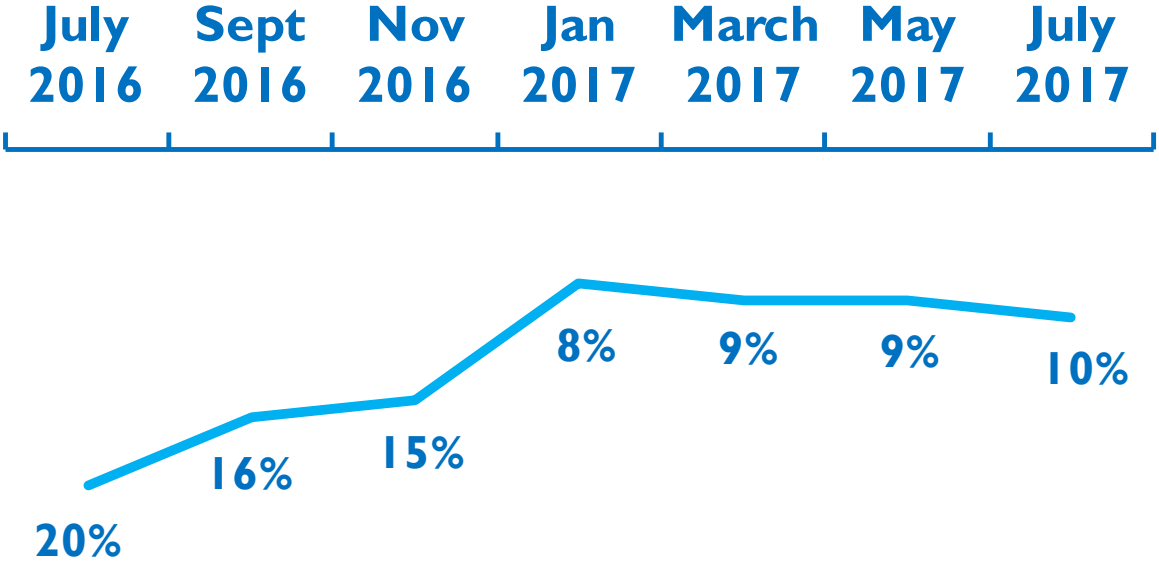
# China increases as USA takes a dip



**17%**  
currently not experiencing growth from any overseas markets



# France remains the main declining market

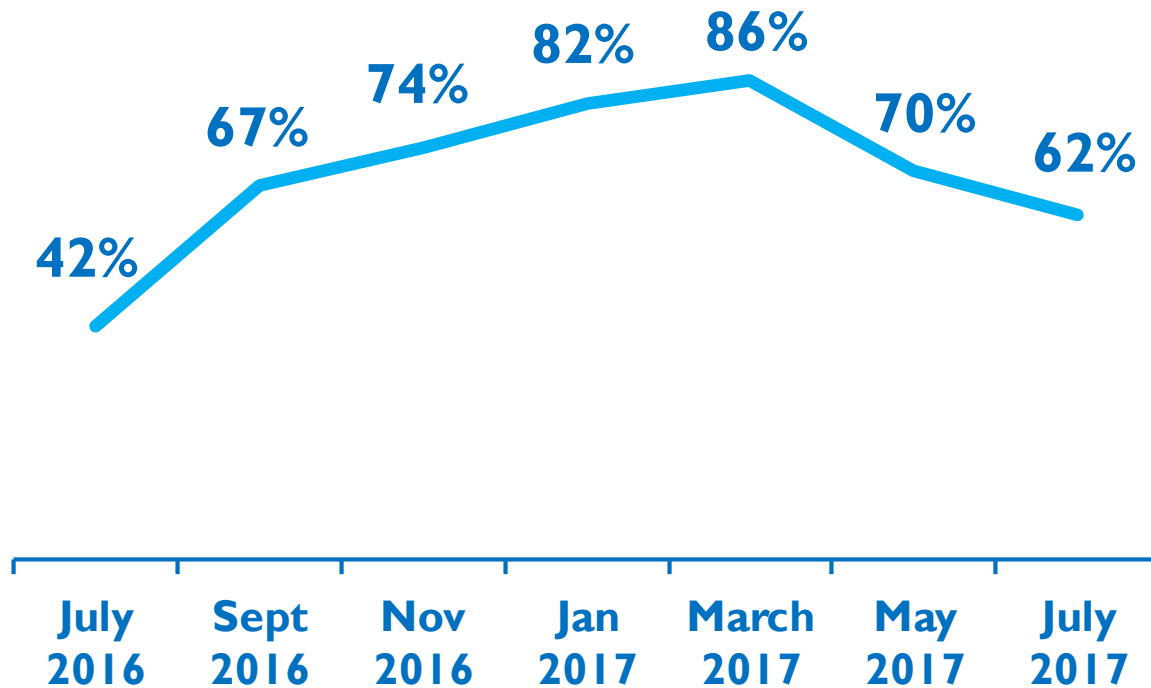


**57%**  
currently not  
experiencing  
decline from any  
overseas markets



Q5. Please select the main market that you are currently experiencing decline in. Base: 69

# Confidence levels takes another dip regarding bookings / visitor revenues over next 12 months



Confidence highest amongst Attractions (81%) & Tour Operators (63%)

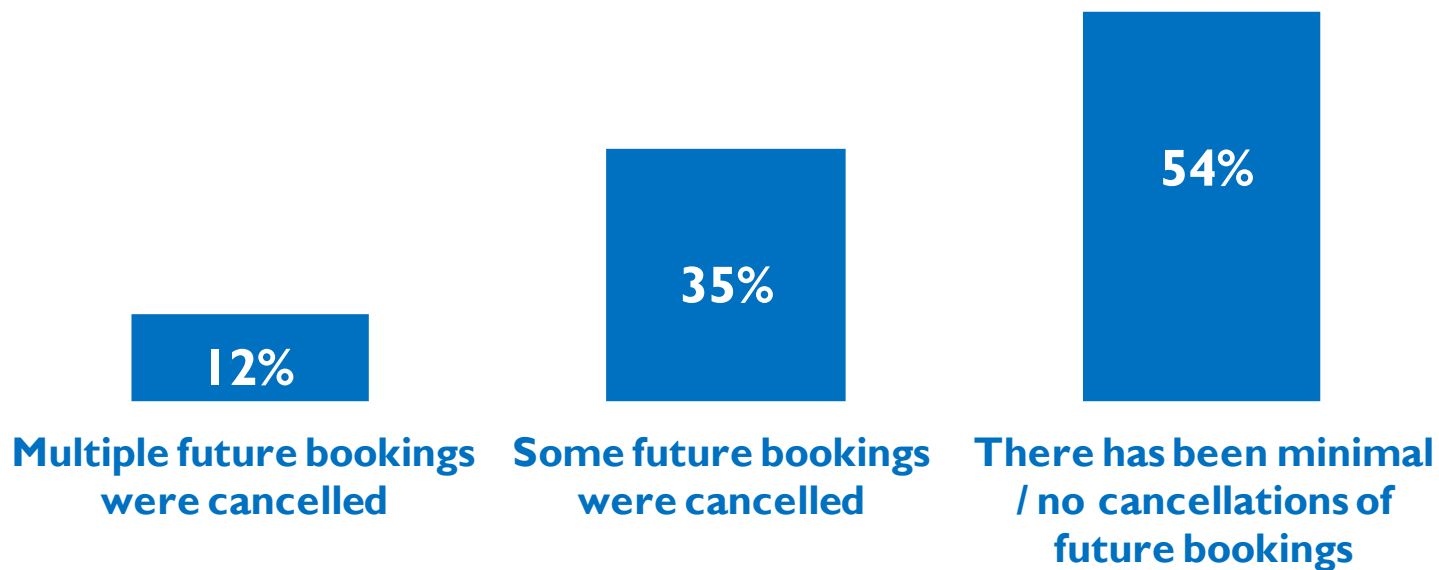
## Half of respondents had multiple or some existing bookings following the terrorist attacks



# Half of respondents had 'multiple' or 'some' existing bookings cancelled following the terrorist attacks



# Nearly half (47%) had 'multiple' or 'some' future bookings cancelled following the terrorist attacks



Q7. Reflecting on the recent terror attacks in the UK, what impact have they had on your future bookings? Base: 69

# Increase in marketing promoting the UK and a strong security / welcome message should be the main support from the govt.





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