



Business Barometer Survey 2017

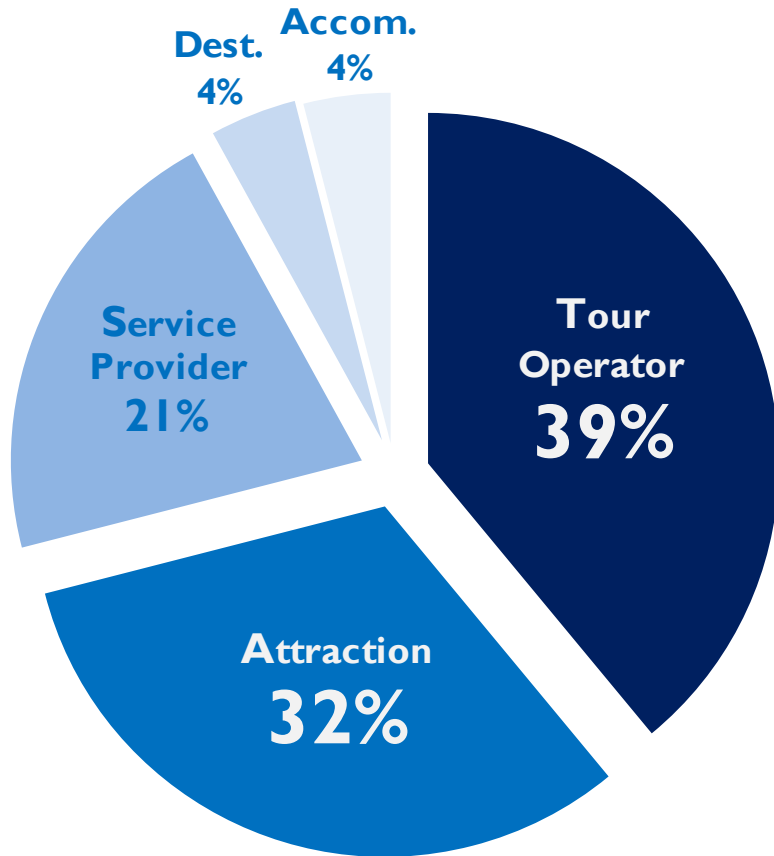
Key Findings
January 17



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Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



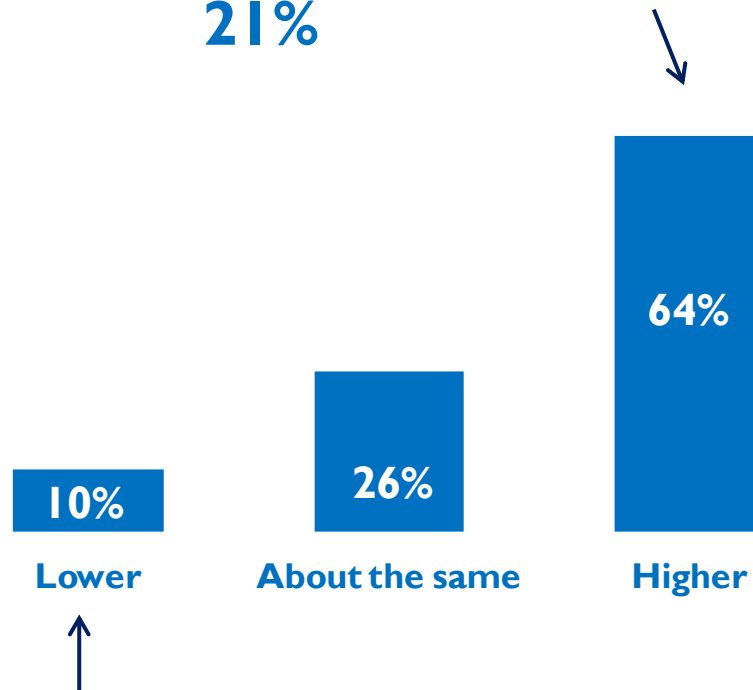
Q1. Which membership category do you fall into? Base: 72

Results

Bookings / visitor numbers in Nov & Dec 16 are higher for nearly two-thirds of members compared to 2015

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

21%



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

14%



Q2. Compared with November and December in 2015 were your bookings / visitor numbers for the same period in 2016: higher, about the same or lower? Base: 72



Why did your bookings / visitor numbers increase?

“We are just starting business and more clients coming to find us in China market”
Tour Operator

“Low value of pound is making the UK a more attractive destination for overseas visitors”
Service Provider

“We believe partly weak £ also halo still from Shakespeare's 400th”
Destination



“Social media advertising, on site installation / promotion, word of mouth since re-launch”
Attraction

“Extended reach via new partners and increased market share by working closer with our existing partners”
Service Provider

Why did your bookings / visitor numbers *decrease*?

“Main drop was in November - no Rugby World Cup this year and US elections both having an effect”

Attraction

“Price competition”
Tour Operator

“No round tours, lower number of London bookings”

Tour Operator



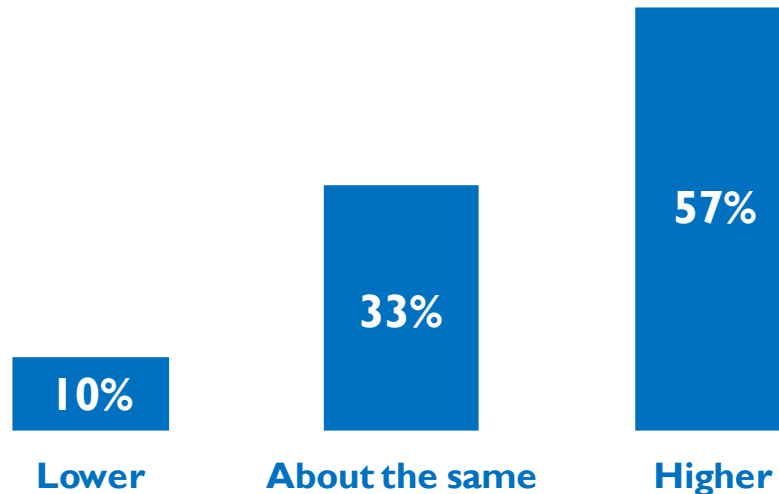
“Groups travelling to London were down same period particularly for November, we benefited heavily from the RWC previous year with extended programmes into November 15”

Tour Operator

Revenue yield in Nov & Dec 16 increased for over half of members compared to 2015

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

22%



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

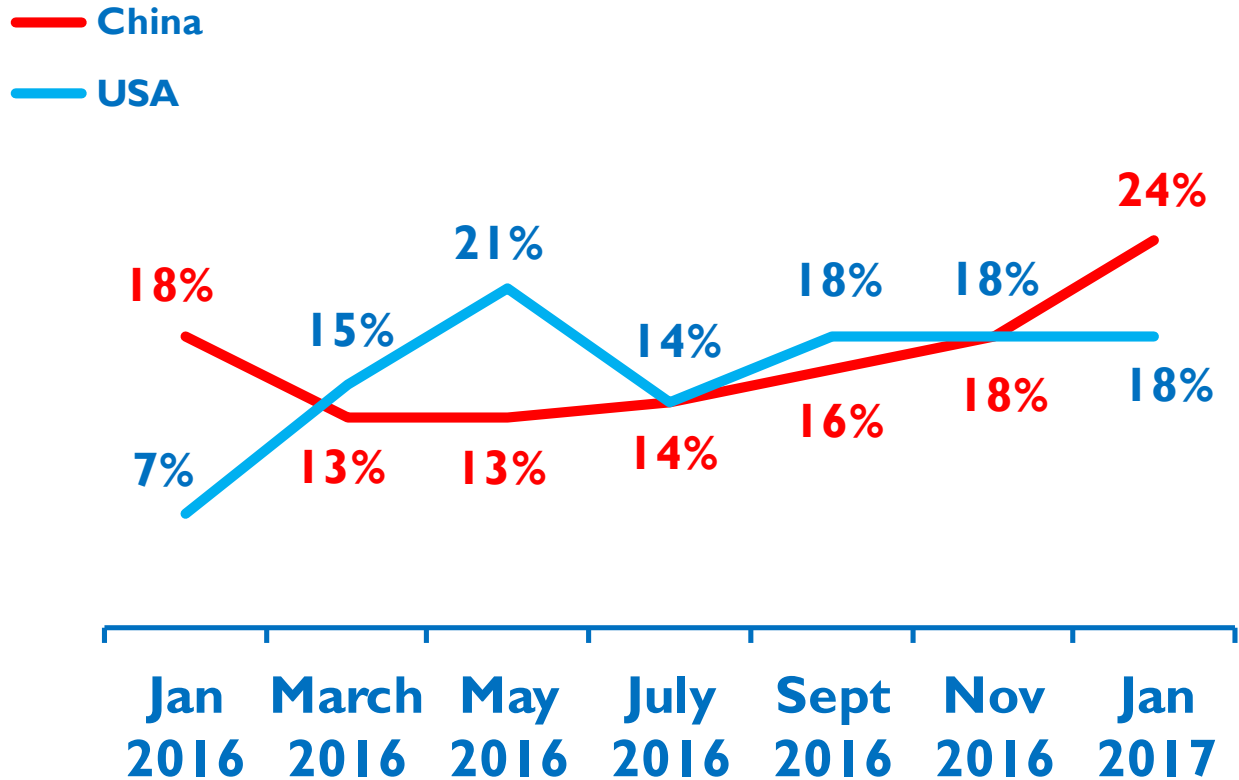
22%



Q3. Compared with November and December in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 72



China main growth market following notable boost

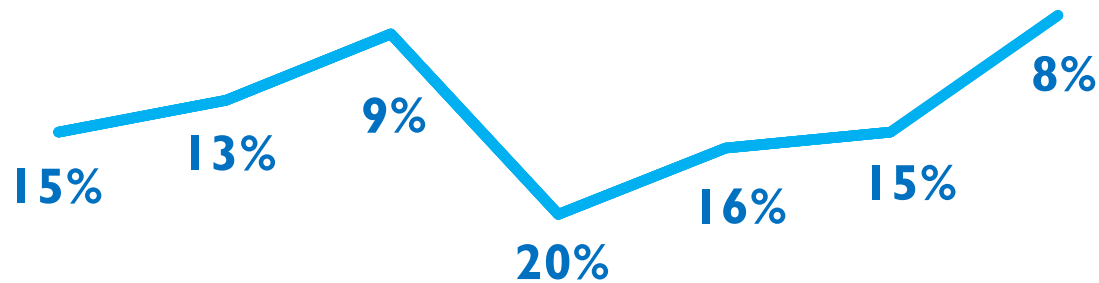


15%
currently not experiencing growth from any overseas markets



Although recovering, France still main declining market

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

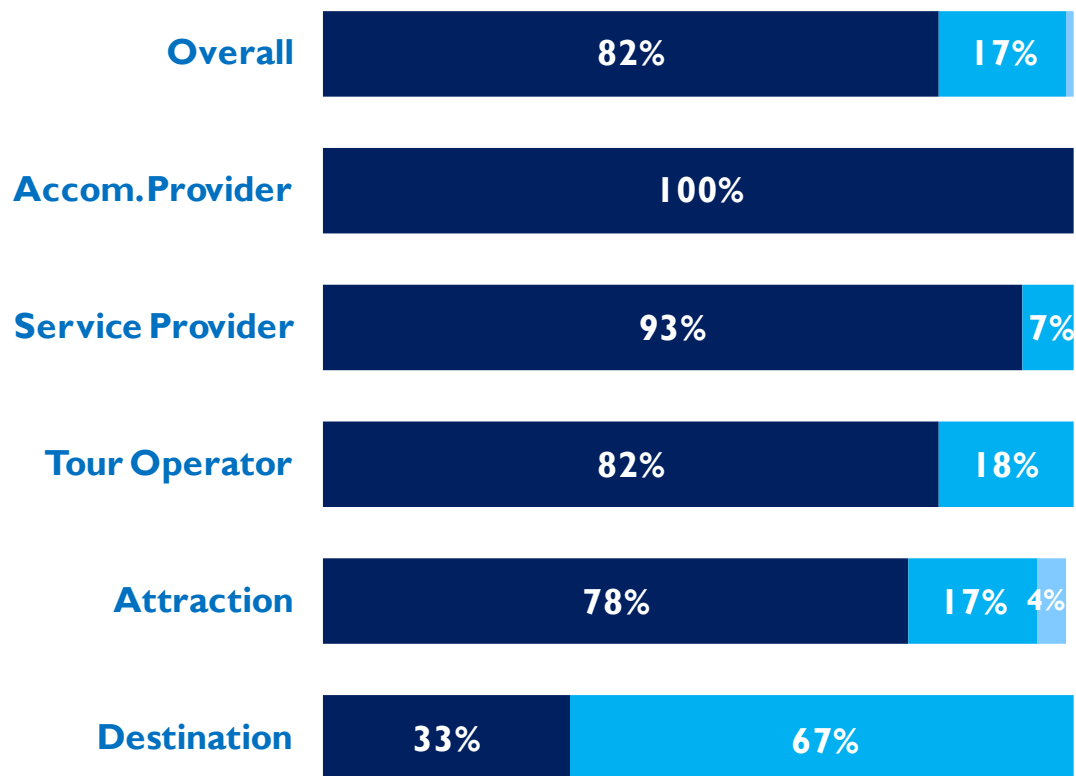


56%
currently not
experiencing
decline from any
overseas markets



Q5. Please select the main market that you are currently experiencing decline in. Base: 72

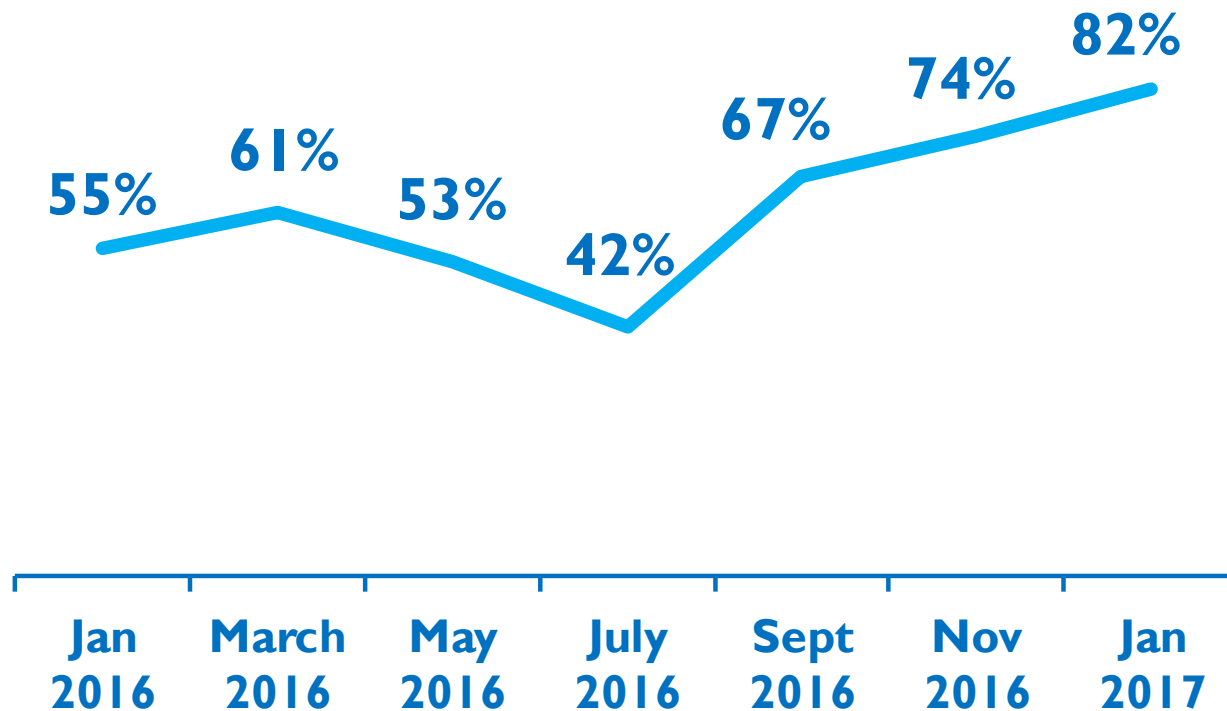
Confidence highest amongst Accom. and Service Providers regarding bookings / visitor revenues over next 12 months



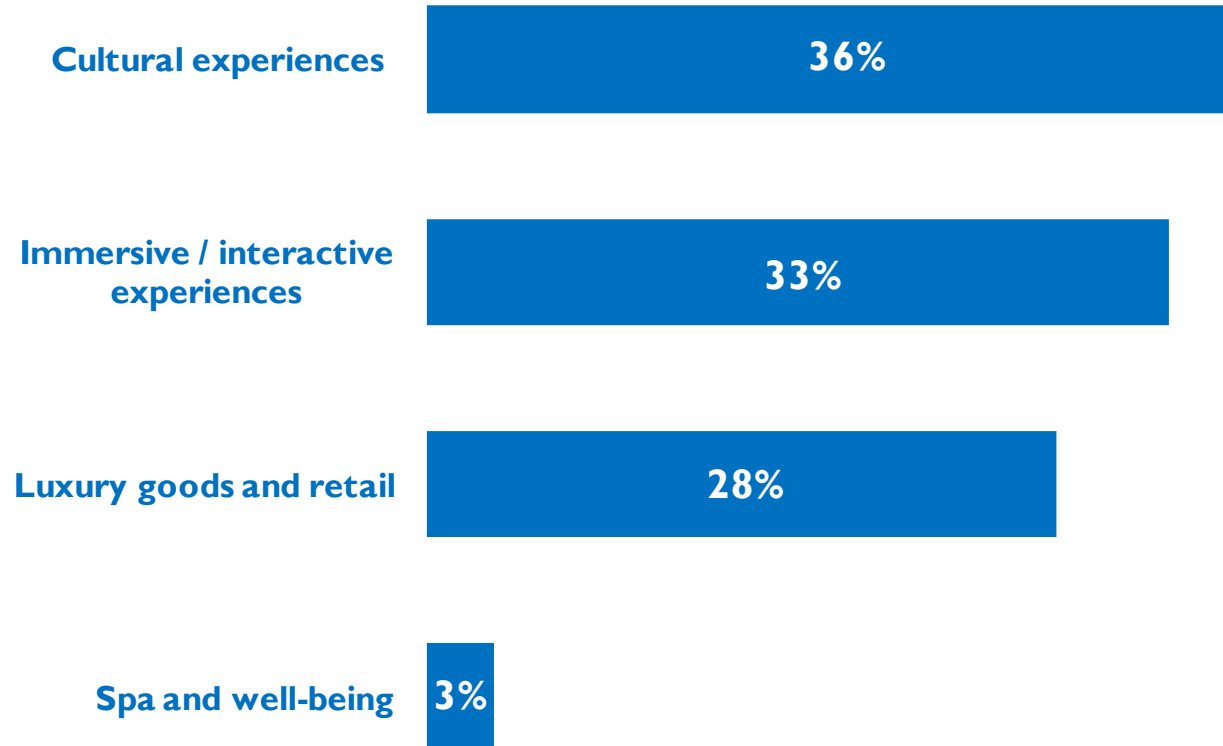
Please note that the destination and accom. providers sample sizes were small

■ Confident ■ Neither confident nor unconfident ■ Unconfident

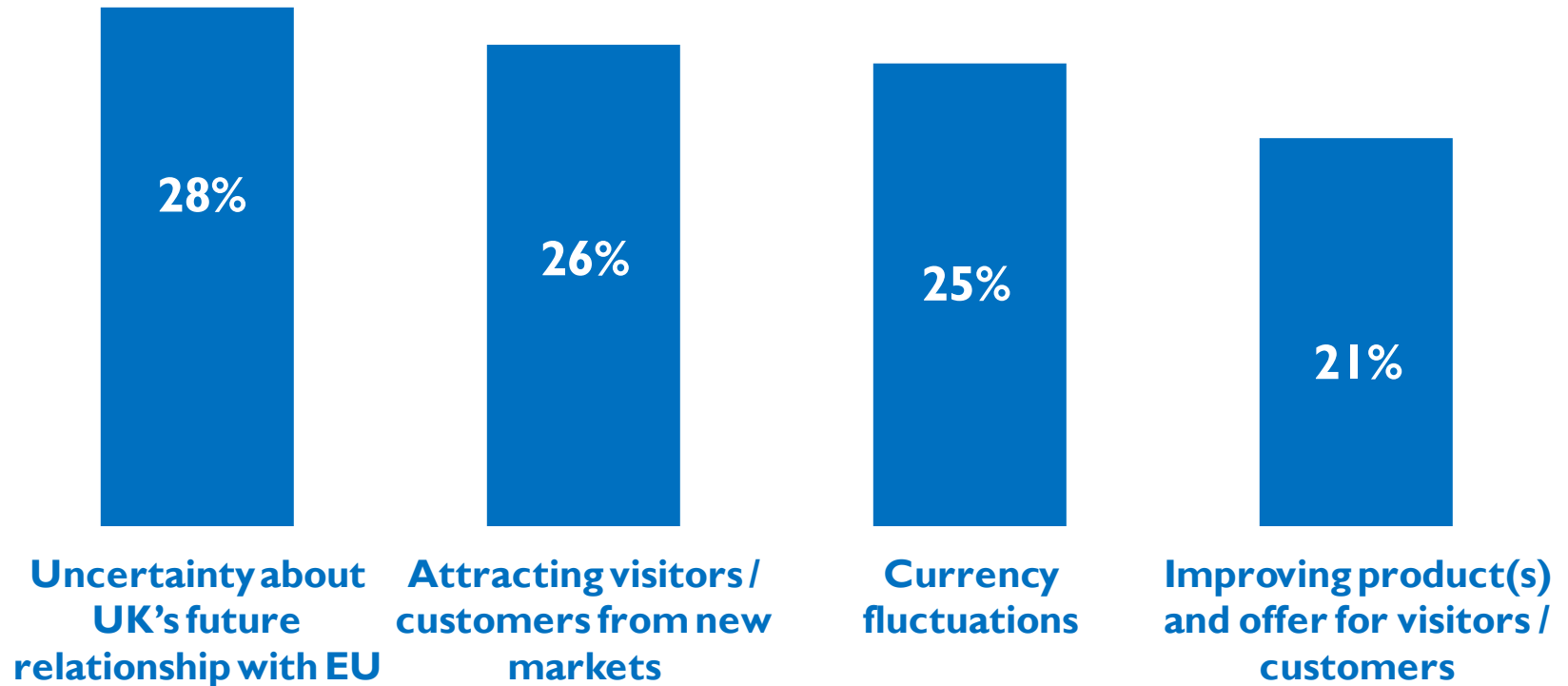
Confidence levels continue to increase regarding bookings / visitor revenues over next 12 months



'Cultural experiences' to be key growth area for inbound visits



Members see a variety of challenges affecting their business in 2017





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