



Business Barometer Survey 2016

Key Findings

November 16



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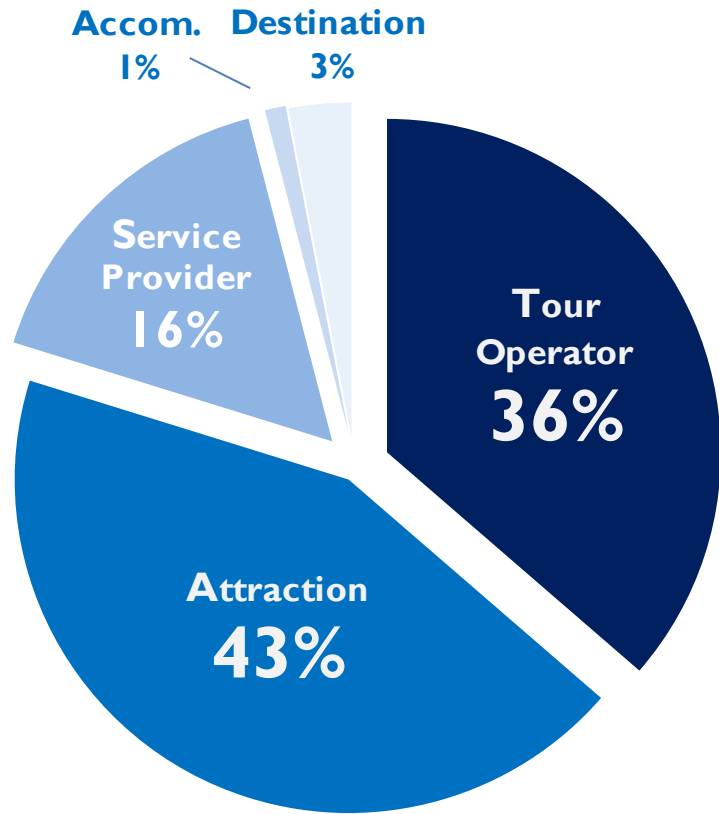


Aims & method

- **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 November 2016**
- **74 completed questionnaires – 22% of members**
- **Many thanks for taking part!**

The top screenshot shows the survey title "UKinbound Business Barometer 2016" and a thank you message. It lists the survey's aims: to understand how different sectors are performing, determine the level of business generated, inform lobbying and PR activity, and allow UKinbound to react to industry developments. It also mentions that the survey is being conducted by Qa Research Ltd. and that the results will be used to inform industry developments. The bottom screenshot shows a section of the questionnaire with various questions and a progress indicator. The questions include: "Air Passenger Duty", "Visas", "Exchange rates", "Price", "Availability", "UK competitiveness with other destinations", "VAT", "Welcome", "Awareness of UK tourism product", "Number of visits into the UK from overseas destinations", "Airport capacity", "GREAT campaign", "Quality of accommodation", and "Awareness of other tourism services in the UK economy". The progress indicator shows "22% completed".

Varied mix of sectors took part



Sample broadly reflective of membership breakdown.



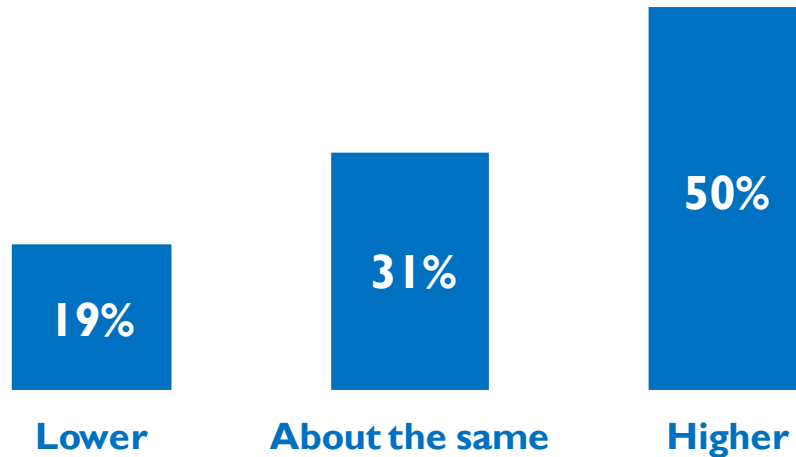
Q1. Which membership category do you fall into? Base: 74

Results

Bookings / visitor numbers in Sept & October 16 are higher for nearly half of members compared to 2015

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

19%



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

15%



Q2. Compared with September and October in 2015 were your bookings / visitor numbers for the same period in 2016: higher, about the same or lower? Base: 74



Why did your bookings / visitor numbers increase?

“Increased sales training / higher conversion”
Service Provider

“Increased investment into our own marketing spend”
Service Provider

“Strong finish to Summer 2016 from North American market”
Tour Operator



“New marketing campaign, low pound”
Attraction

“Weak pound post Brexit vote, terrorism in mainland Europe means people see the UK as safer. Easier entry for Chinese since changes in visas”
Attraction

Why did your bookings / visitor numbers *decrease*?

“No Rugby World Cup, US market depressed because of election”
Attraction

“Last year we hosted the Chinese premier”
Tour Operator

“London is still perceived as unsafe”
Service Provider



“We handled a lot of Rugby World Cup guests during Sept / Oct 2015”
Tour Operator

“Continued impact of terrorism attacks / Calais problems”
Attraction

Revenue yield in Oct & Sept 16 increased for nearly half of members compared to 2015

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

19%



18%

Lower



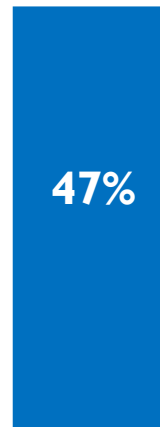
For those who selected lower, on average, revenue yield decreased by

14%



35%

About the same



47%

Higher



Increase most prominent amongst Service Providers (50%) & Tour Operators (48%)

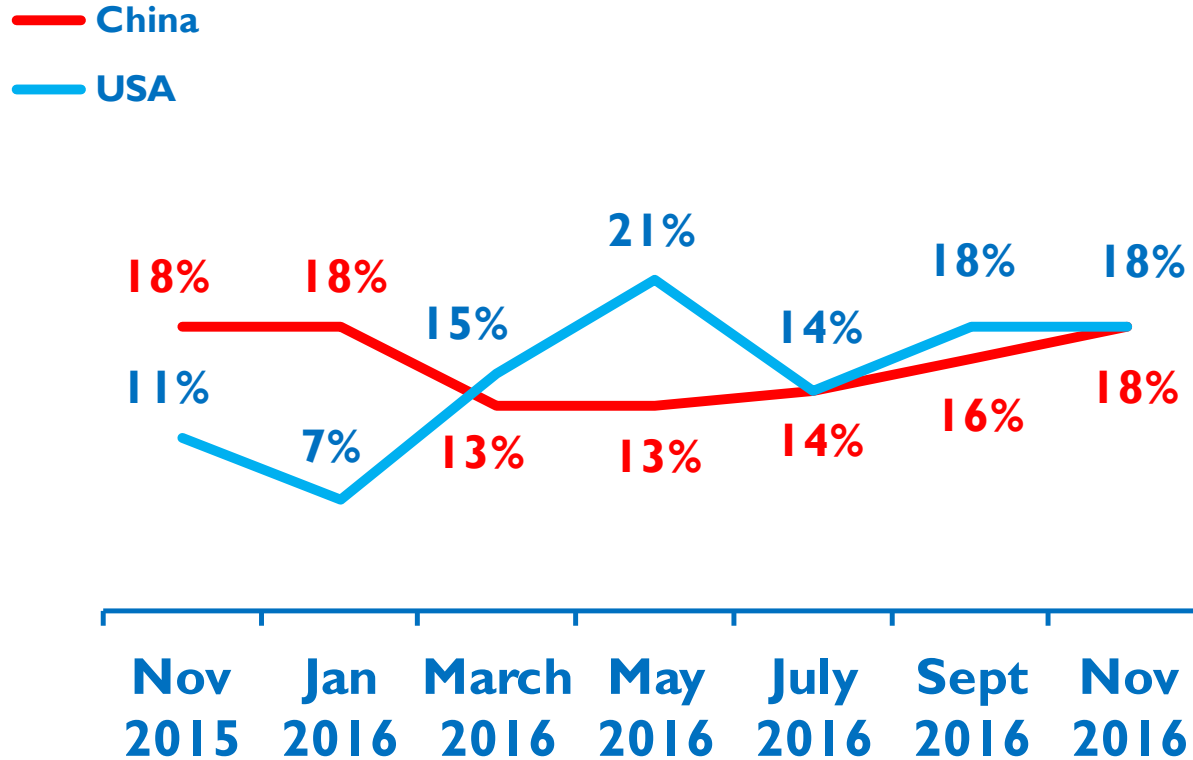
Decrease most prominent amongst Attractions (41%)



Q3. Compared with September and October in 2015, was your revenue yield for the same period in 2016: higher, about the same or lower? Base: 74



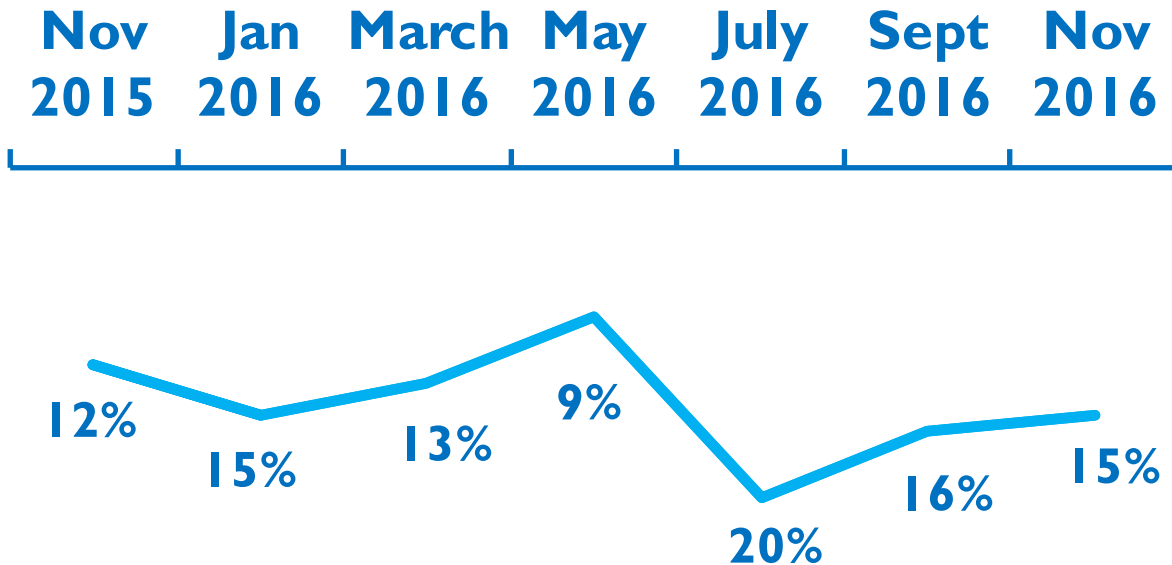
China & USA joint top growth markets



20%
currently not
experiencing
growth from
any overseas
markets



France continues to be main declining market

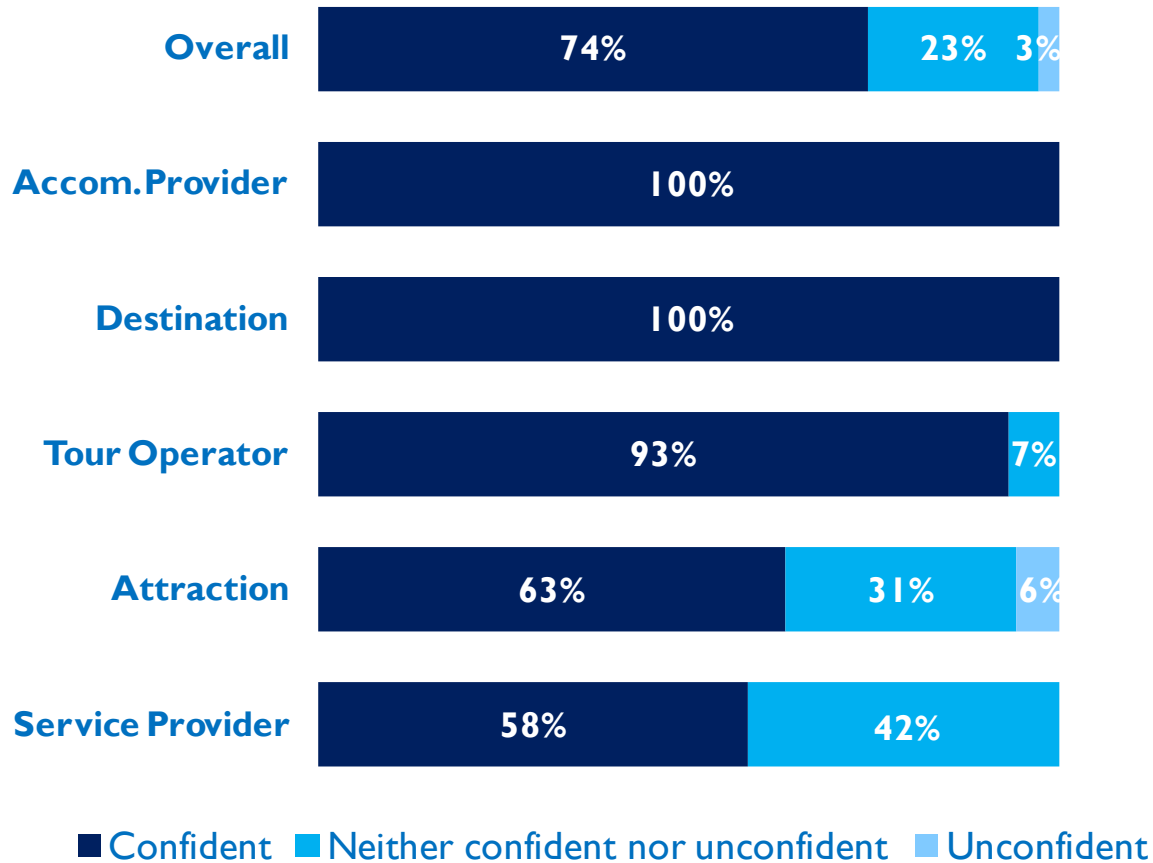


53%
currently not
experiencing
decline from any
overseas markets



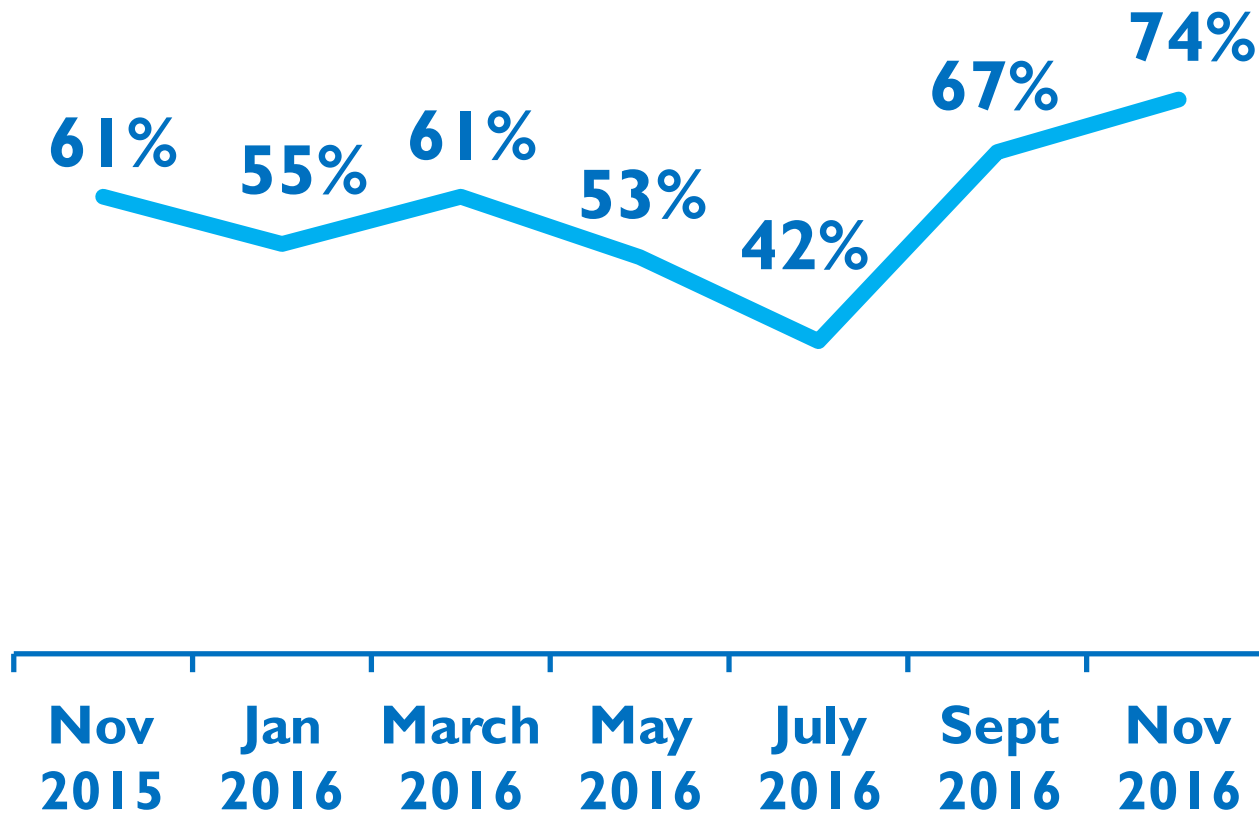
Q5. Please select the main market that you are currently experiencing decline in. Base: 74

Confidence levels highest amongst Accom. and Destinations regarding bookings / visitor revenues over next 12 months

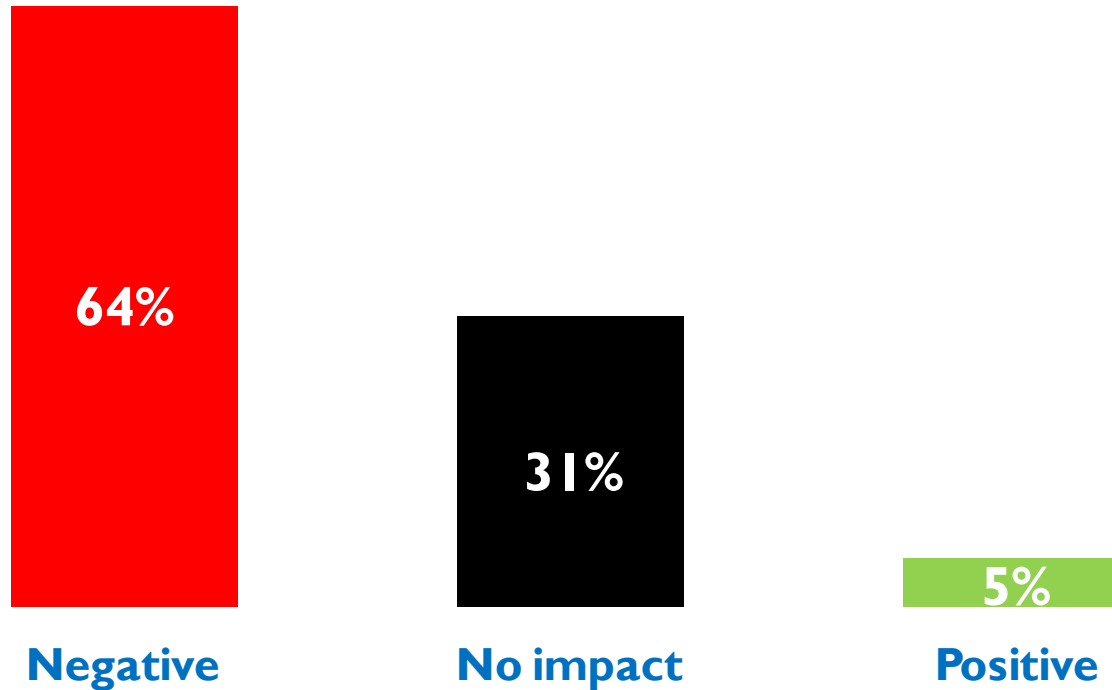


Please note that the destination and accom. providers sample sizes were small

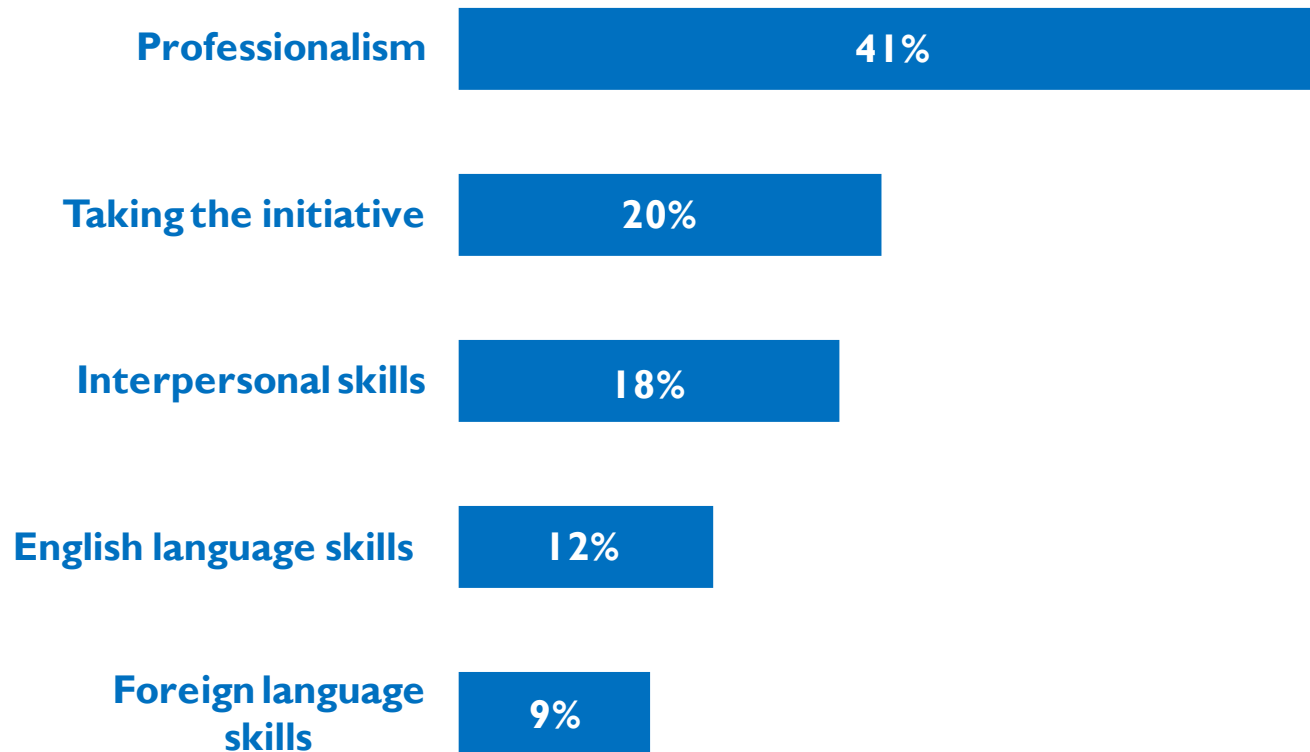
Confidence levels continue to increase regarding bookings / visitor revenues over next 12 months



Two thirds of members think that restrictions on employing EU citizens will have a negative impact on their business



Young recruits most likely to need training in 'professionalism'





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