



Business Barometer Survey 2018

Key Findings February 2018



Mill House
North Street
York, YO1 6JD
Tel: 01904 632039



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 to members January 2018**
- **61 completed surveys – 15% of membership base**
- **Many thanks for taking part!**

Q1 Which of the following factors are likely to impact future bookings / visitor retention in either a positive or negative way over the next 12 months?

	Very positive	Positive	Mixed (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"/>
Welfare	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of UK tourism products	<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 what tourism generates to the 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"/>

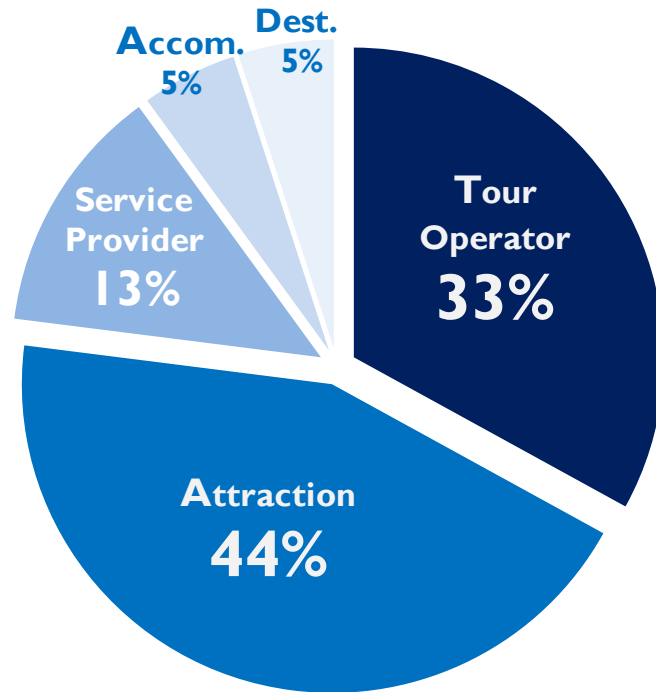
Go to completion

Next

Qa RESEARCH

Varied mix of sectors took part

Sample broadly reflective of membership breakdown.



Q1. Which membership category do you fall into? Base: 61

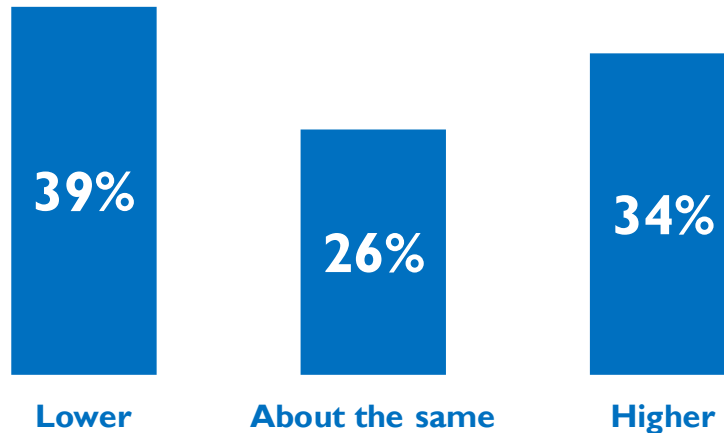


RESULTS

Bookings / visitor numbers / customer orders in Nov & Dec 17 higher for 34% of members compared to 2016

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

18%



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

17%

Mixed fortunes for attractions:

41% experienced an increase in visits but 52% a decline.

TOs reported an underwhelming Christmas:

Only 15% saw an increase in bookings but 40% saw a decrease.



Why did your bookings/visitor numbers/customer orders *increase*?

“More global awareness of our unique service.”
Service Provider

“Better marketing, busier destination, trade sales.”
Attraction



“Brexit, £ still weak, UK seen as safer than mainland Europe.”
Attraction

“State of the pound.”
Tour Operator

Why did your bookings/visitor numbers/customer orders *decrease*?

“Ongoing weakness of UK families with kids visiting London during school holidays and weekends.”

Service Provider

“Perhaps bad weather.”

Attraction

“Drop in bookings from all markets. Reasons not clear.”

Tour Operator

“Perception of general decline of overall market share e.g. less tourists in London”

Attraction

“Fall in demand for London.”

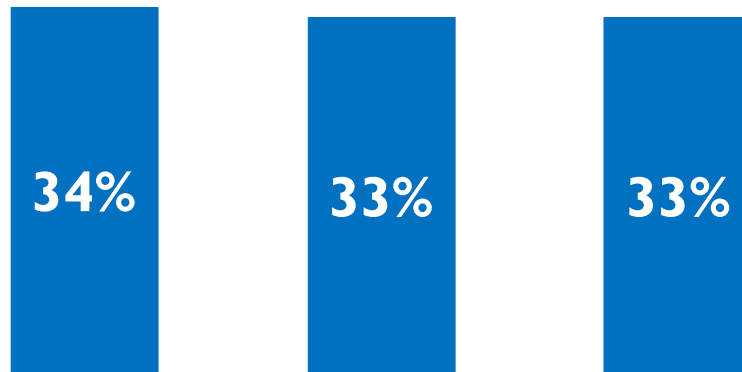
Tour Operator



Revenue yield in Nov & Dec 17 increased for 33% of members compared to 2016

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

15%



Lower

About the same

Higher



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

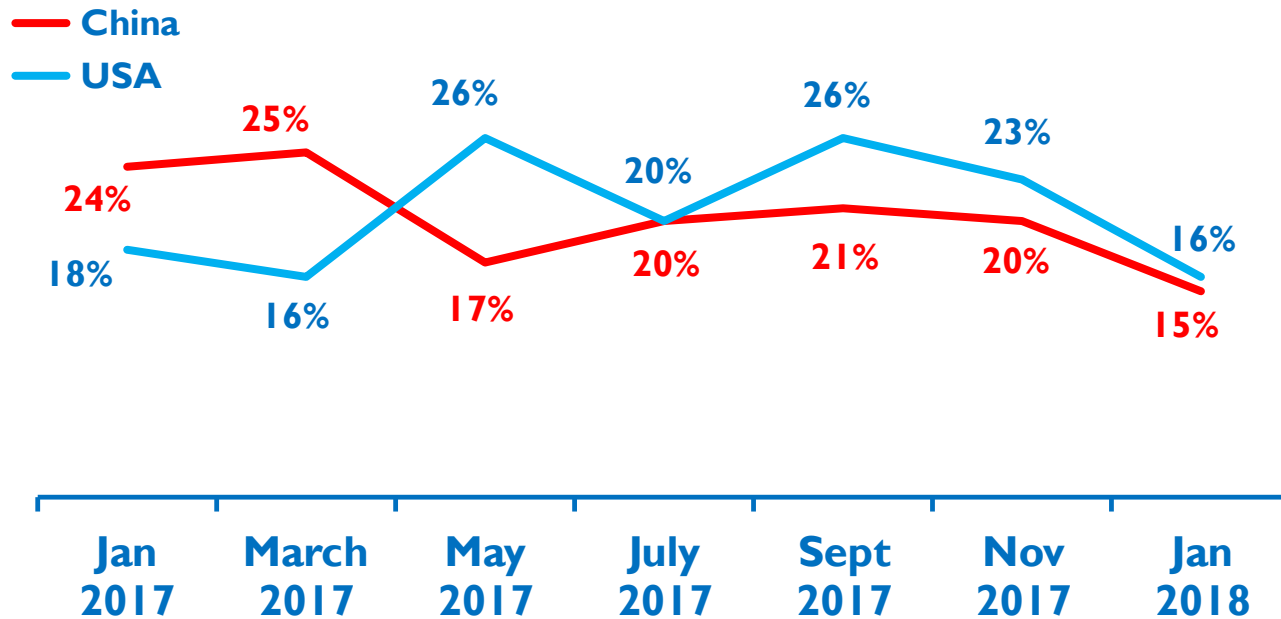
16%

Attractions revealed a polarised picture: 44% experienced an increase in revenue & 41% a decrease.

Many TOs saw a decline in revenues at Christmas: Only 15% had an increase in revenue yield whereas 45% reported a decrease.



USA & China main growth markets but at lowest levels since March 2017



33%

Not experiencing growth from any overseas markets, up from 25% in the previous two-month period.



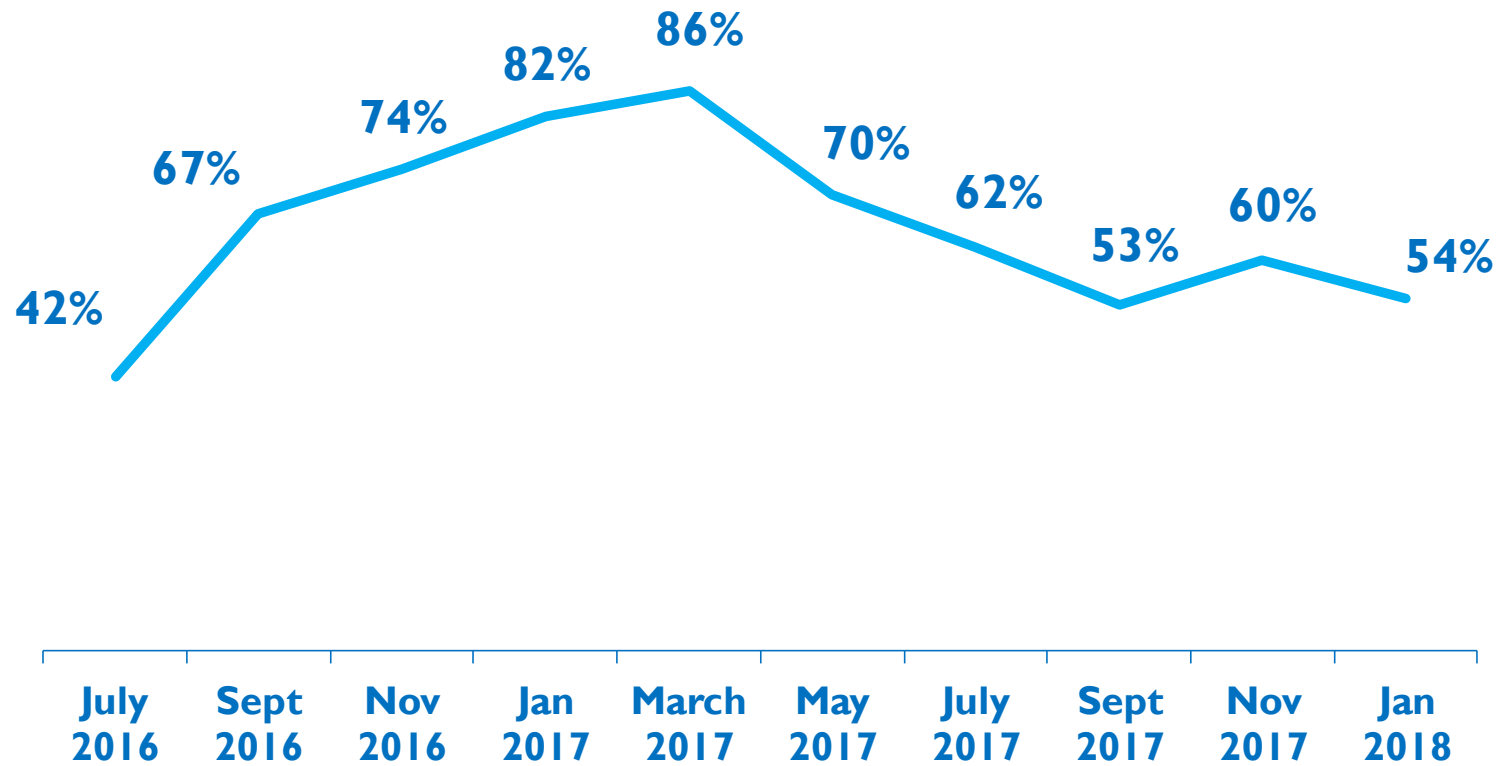
France remains as main declining market



49%

Not experiencing
decline from any
overseas markets.

Confidence in future business levels dips again



Reasons for feeling *confident* about the next 12 months...

“Short term weakness of Sterling will continue to make Scotland an attractive destination for European visitors.”
Service Provider

“Positive feedback from overseas markets and our links with China are stronger than ever.”
Destination

“Demand remains strong and all research shows a continuation into 2018.”
Accom. Provider

“Pound is still quite low. Hoping to receive more overseas visitors.”
Attraction

“Potential new partnerships and plans/promotions.”
Tour Operator



Reasons for feeling *less confident* about the next 12 months...

“Uncertainty over Brexit.”
Service Provider

*“Clients worry about
terrorist attacks.”*
Tour Operator



*“As Brexit rumbles on, confidence is
low, inflation is high, and real wages
continue to be squeezed.”*

Attraction

*“Prices are high compared to
wider Europe.”*
Tour Operator

More awareness of regional offer seen as key trigger to grow UK-wide visits

More awareness of regional product/attractions

41%

"We need better flight connections from Northern Europe to regional airports, not just LON, EDI, MAN."

Tour Operator

Improved transportation links

25%

More accommodation for groups

23%

"More partnerships between travel providers and UK attractions to create more incentives to visit the UK."

Service Provider

Variety of tourism product all year round

11%

"A single pass across all local transport systems."

Attraction

"Effort to emphasise security which related to terrorism."

Tour Operator



Rail network seen as key improvement needed to UK transport

UK train network (e.g. routes, links and cost)

59%

An increase in international airline routes to regional airports

24%

Better access/facilities for coaches

10%

UK road network

7%

“Tourist awareness that the map isn't relative to distances.”

Attraction

“Parking charges at airports for coaches go up all the time, increasing coach costs.”

Tour Operator

“Faster travel through airports. Quicker immigration controls and security.”

Tour Operator



Q8. Where should improvements be made to transportation in the UK?
Base: 29, ranked in order of preference, 'other' ideas shown in quotes



Contact ...

Richard Bryan

richard.bryan@qaresearch.co.uk

01904 632039

www.qaresearch.co.uk

