



# Business Barometer Survey 2018

## Key Findings

May 2018



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# Aims & method

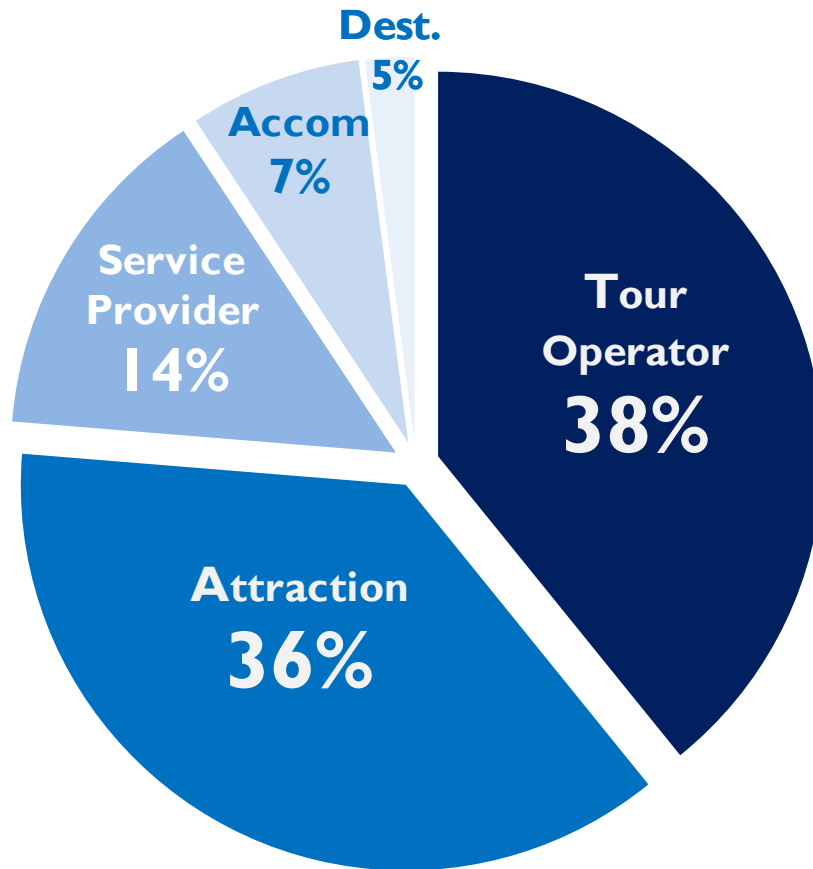
- **Business barometer survey of members**
- **The aims of the barometer are to:**
  - Understand how different membership sectors are performing
  - Determine the level of business generated by membership
  - Inform lobbying & PR activity
  - Enable UKinbound to react to industry developments more quickly, by gathering feedback on current issues impacting the tourism industry
- **Online survey sent to members March 2018**
- **56 completed surveys = 14% of membership**
- **Many thanks for taking part!**

Q1: 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	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"/>
Welcome	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness 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"/>
UKEAT 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 value tourism generates to 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"/>

Qa RESEARCH

# Varied mix of sectors took part



Sample broadly reflective of membership breakdown although there were no responses from the accommodation sector.



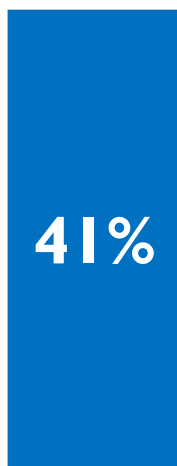
RESULTS

# Just under 1/3 felt they had increased business

In March & April 18 compared with the same months in 17  
with bookings/visitor numbers/customer orders

On average, orders  
DECREASED by

14%



Lower

On average, orders  
INCREASED by

23%



Higher

27%

About the same

**Attractions  
polarised:**

45% reported an  
increase in visits &  
40% a decline

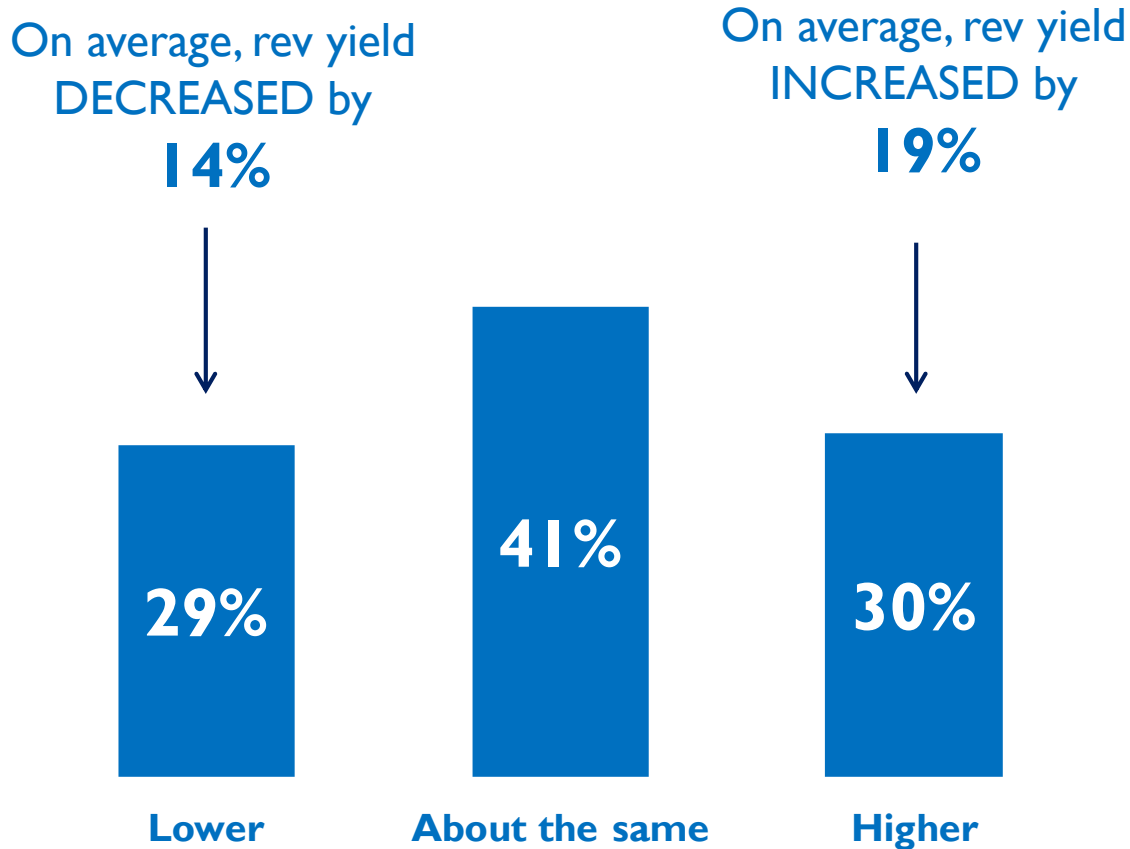
**TOs also  
revealed mixed  
picture:**

Only 24% saw an  
increase in  
bookings, 38%  
about the same,  
38% a decrease.



# Nearly 1/3 claimed increased revenue yield

In March & April 18 compared with the same months in 17

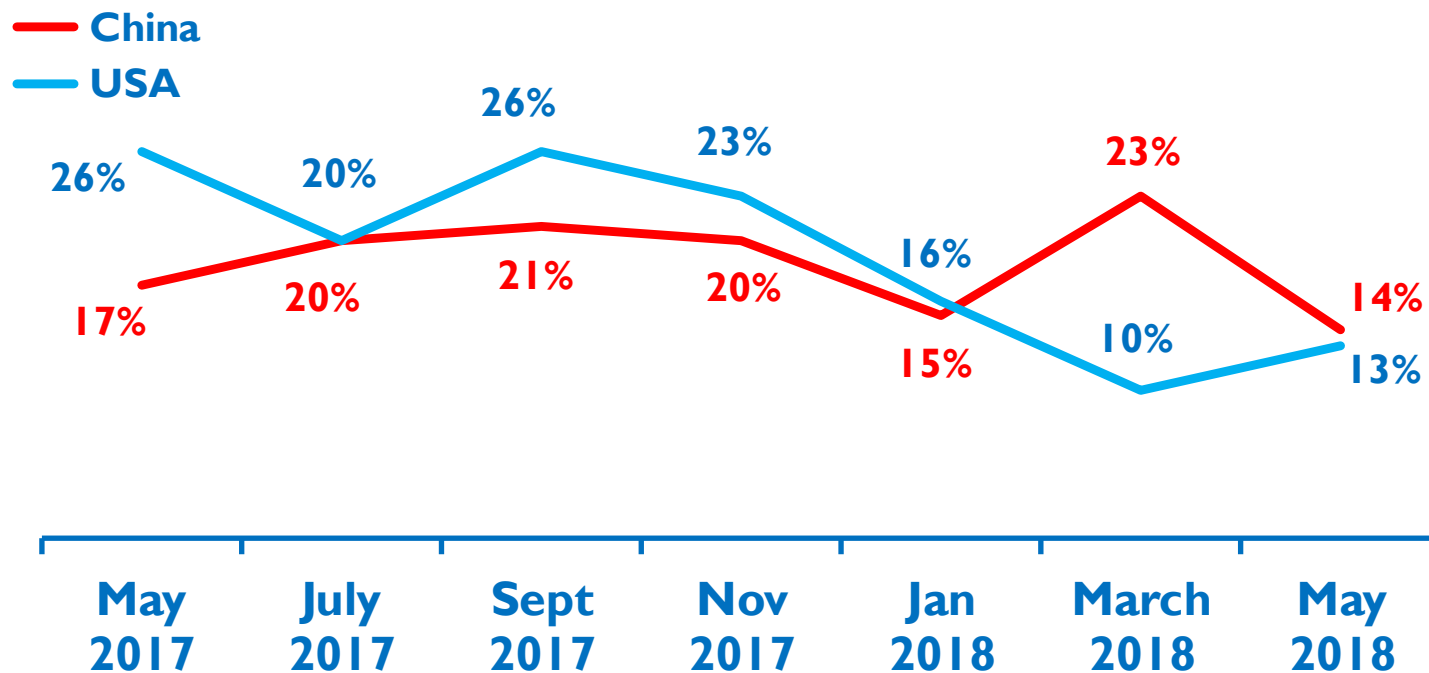


**Higher prop of attractions rev increased:**  
40% experienced an increase in revenue, 35% about the same & 25% saw a decrease

**Majority of TO rev static:**  
52% said revenues were about the same



# China & USA still leading markets with similar growth levels



**25%**  
Not experiencing growth from any overseas markets



Q4. Please select the main market that you are currently experiencing growth in. Base: 56

# Mixed picture of declining markets & no clear lead



7% saw a decline from China

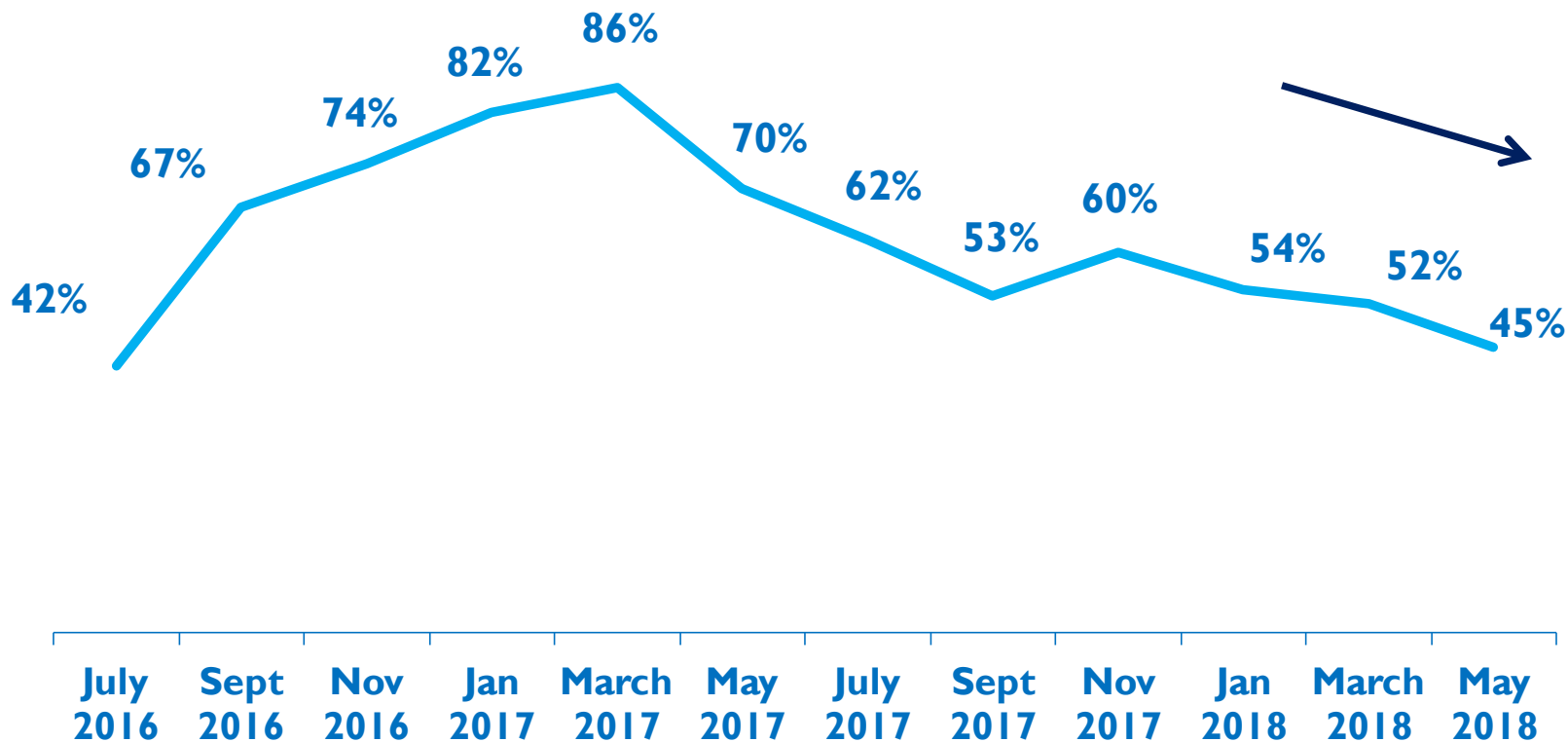
39%  
Not experiencing decline from any overseas markets.

USA, Spain & Germany declined for 5% of members





# Future business confidence levels continue to fall



# Reasons for feeling confident in next 12 mths

*“The Royal Wedding will see an increase in US visitors according to local hotels. A forecasted good weather summer is helping with bookings”*

**Service Provider**

*“European visitors are being replaced by the Chinese albeit lower in ARR, the Chinese market make-up for the occupancy lost”*

**Accom. Provider**

*“If nothing happens in London and the weather stays relatively nice we can achieve good numbers across different markets”*

**Attraction**

*“Market stability, growth plans and increased marketing”*

**Tour Operator**



Q6a. Why do you feel confident about bookings/visitor numbers/customer orders for the next 12 months? Base: 25

# Reasons for feeling less confident in next 12 mths

*“Perception of London is incredibly low, gang crime, high murder rates, acid attacks. We are frequently making the news for all the wrong reasons.”*

**Destination**

*“The 2017 security issues in London appear to have had an affect on business levels for 2018. There are no indications that this might change for 2019.”*

**Tour Operator**

*“A lot of uncertainty in the market, which is already very competitive.”*

**Attraction**

*“Prices in the UK are increasing. Hotel accommodation, transport costs, guiding rates so any advantage we gained by the weak pound has disappeared.”*

**Tour Operator**

*“Brexit!”*

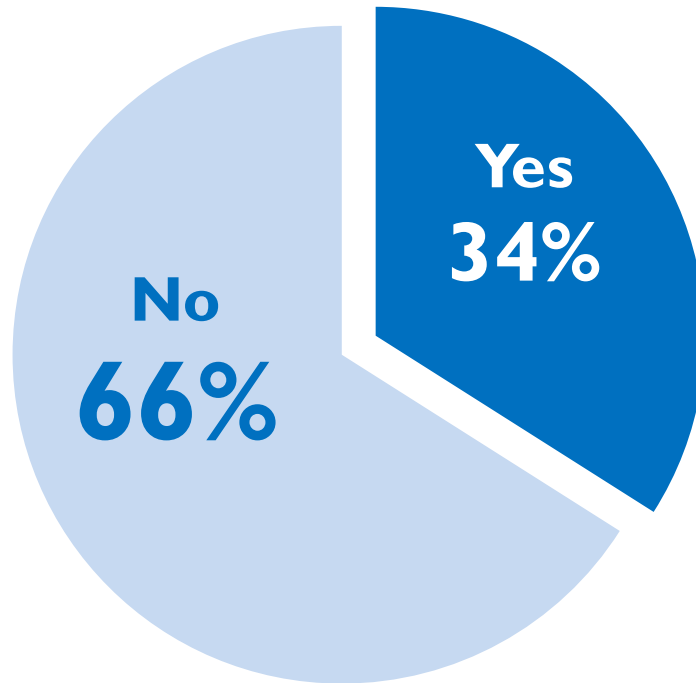
**Tour Operator**



Q6a. Why do you feel less confident about bookings/visitor numbers/customer orders for the next 12 months? Base: 23

# Just over 1/3 employed grads with advanced language skills

In past 5 years



Tour operators  
**43%**

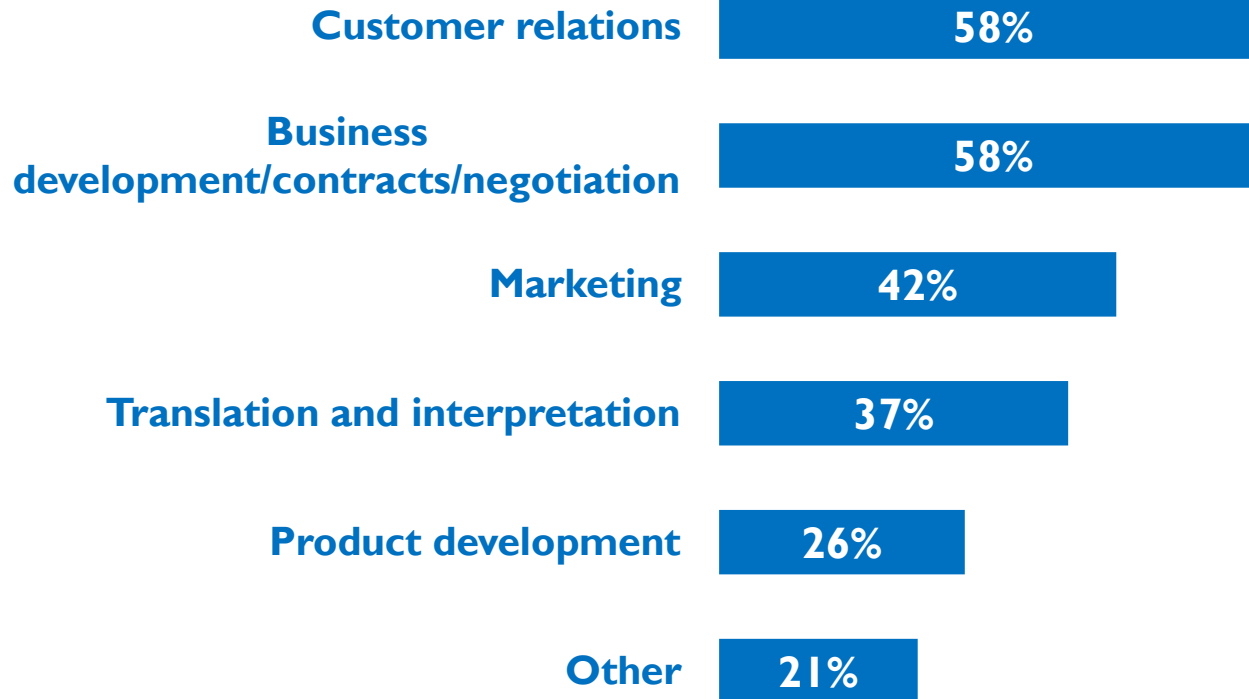
An arrow points from the text 'Tour operators 43%' to the 'Yes' segment of the pie chart, indicating that 43% of tour operators have sought to employ graduates with advanced language skills.



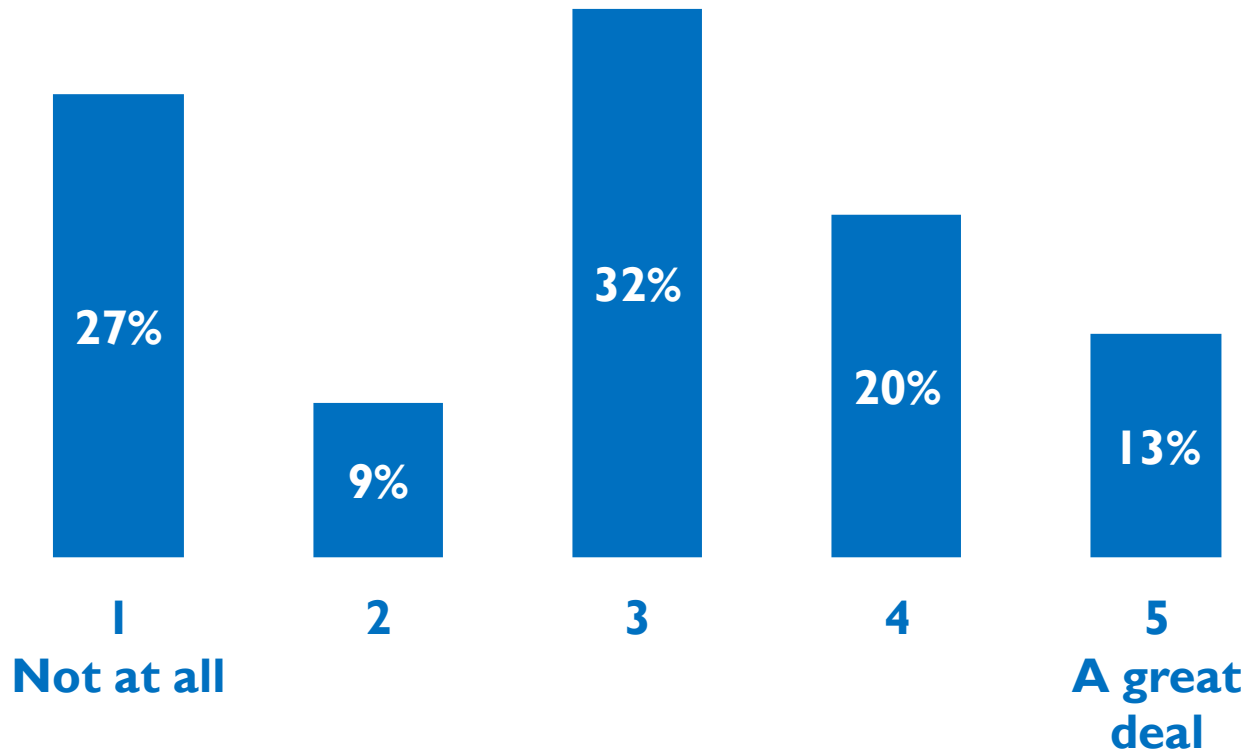
# Lack of need main reason for not employing language grads



# Customer relations & bus dev most popular language grad positions



# Mixed view on future need for language grads









This research has been carried out in compliance with  
ISO 20252, (the International Standard for Market and Social research),  
The Market Research Society's Code of Conduct and UK Data Protection law.



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