



Business Barometer Survey 2018

Key Findings

July 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 July 2018**
- **51 completed surveys = 13% of membership**
- **Many thanks for taking part!**

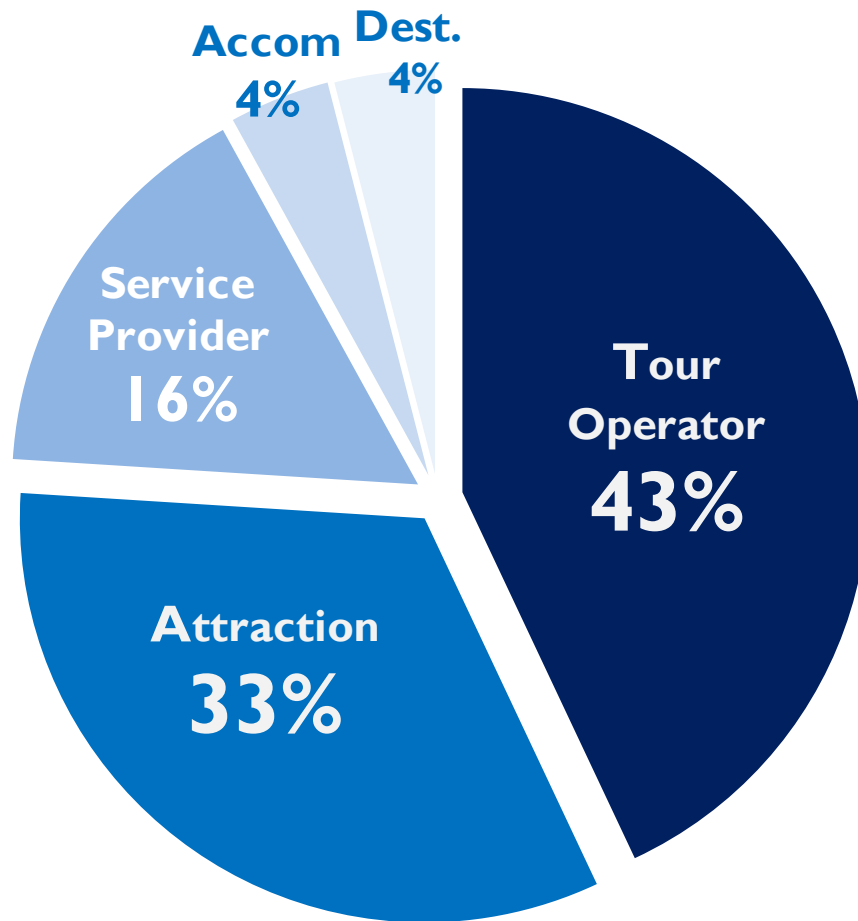
Q1: Which of the following factors are likely to impact future bookings / visitor revenues in either a positive or negative way over the next 12 months?

	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"/>
Assessment 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"/>
Quality of accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment 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"/>

Feedback Next

Qa RESEARCH

Varied mix of sectors took part



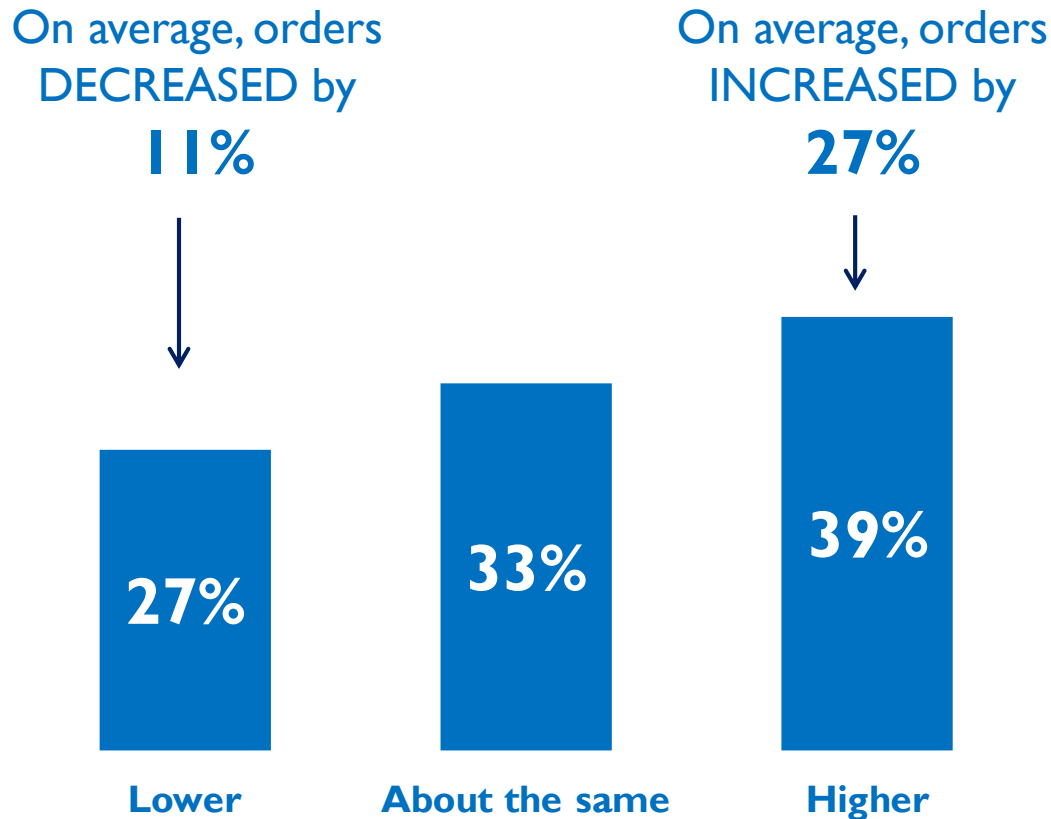
Sample broadly reflective of membership breakdown although there were no responses from the accommodation sector.



RESULTS

Just over 1/3 (39%) felt they had increased business

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



Attractions struggling:

Almost ½ (47%) saw a decline & only 24% an increase in visits

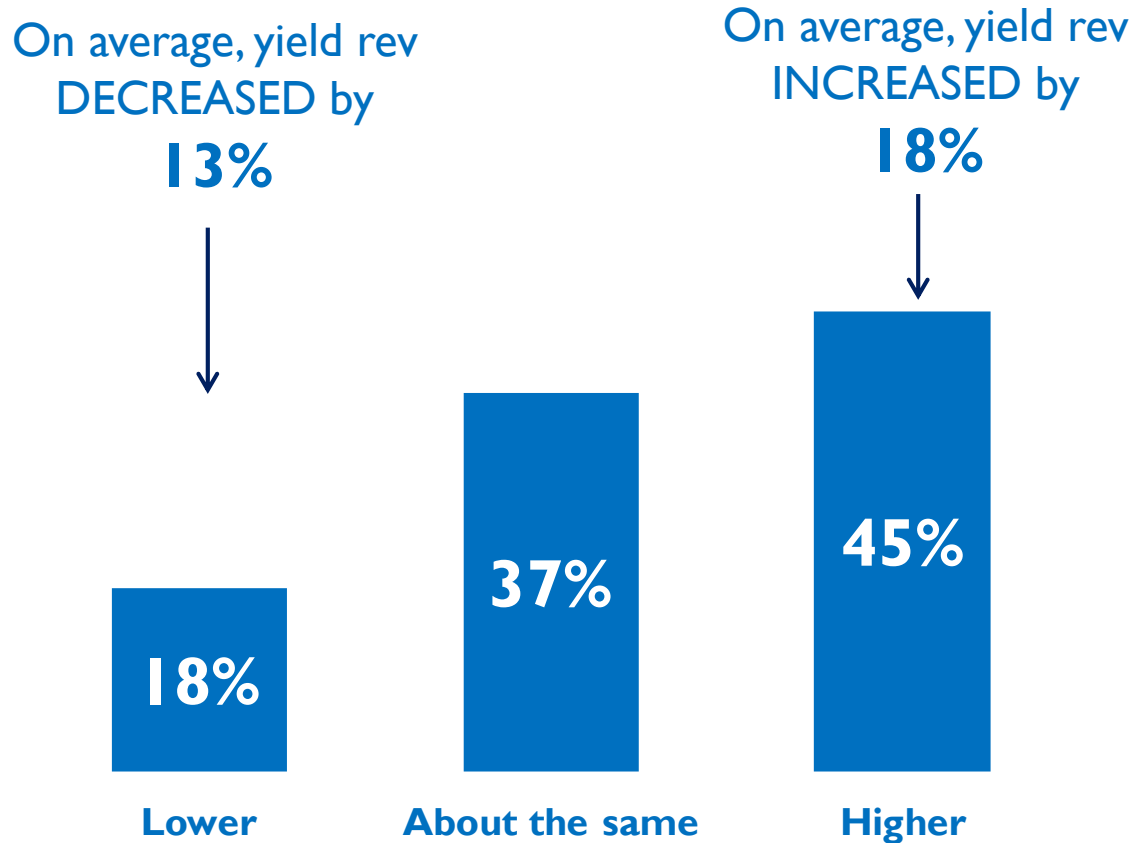
TOs mixed:

Only 36% saw an increase in bookings, 41% about the same, 23% a decrease.



Almost half (45%) claimed increased revenue yield

In May & June 18 compared with the same months in 17



Mixed picture for attractions revenues

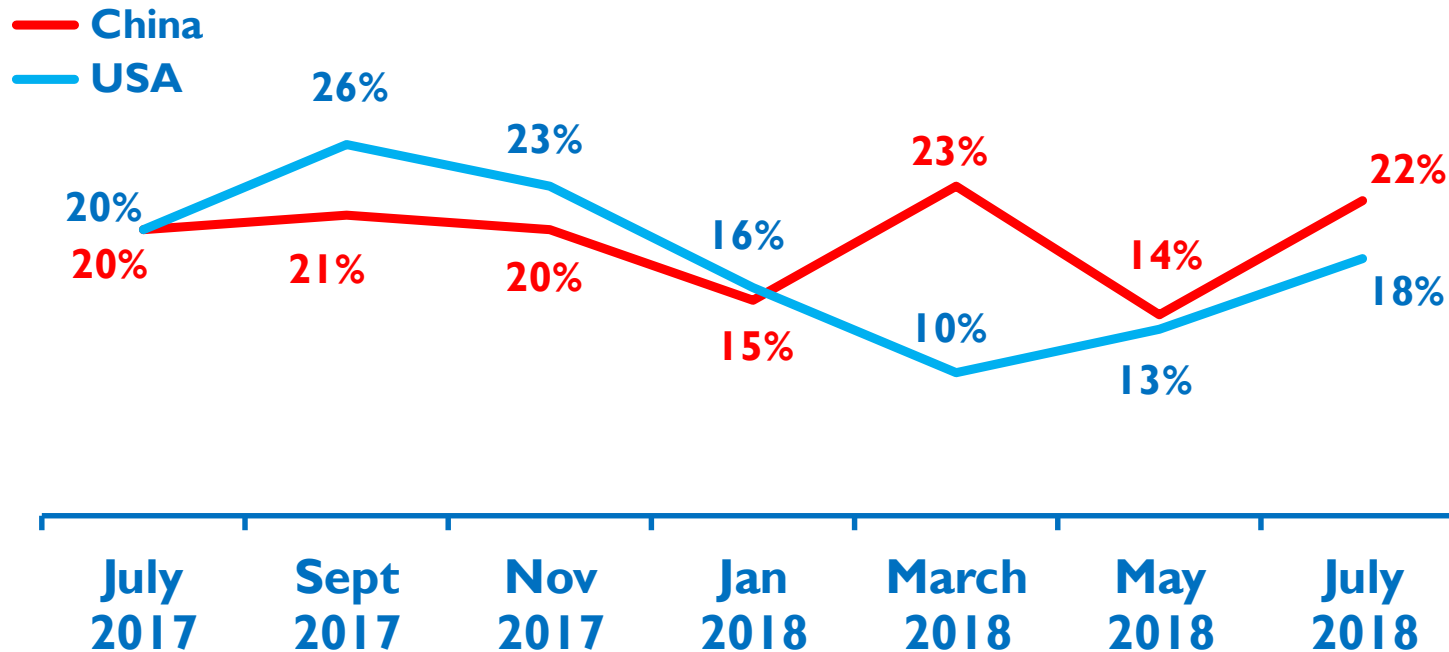
35% experienced an increase, 29% about the same & 35% saw a decrease

No change for majority of TO revenues:

55% said revenues were about the same



China & USA still leading markets with similar growth levels



20%
Not experiencing growth from any overseas markets



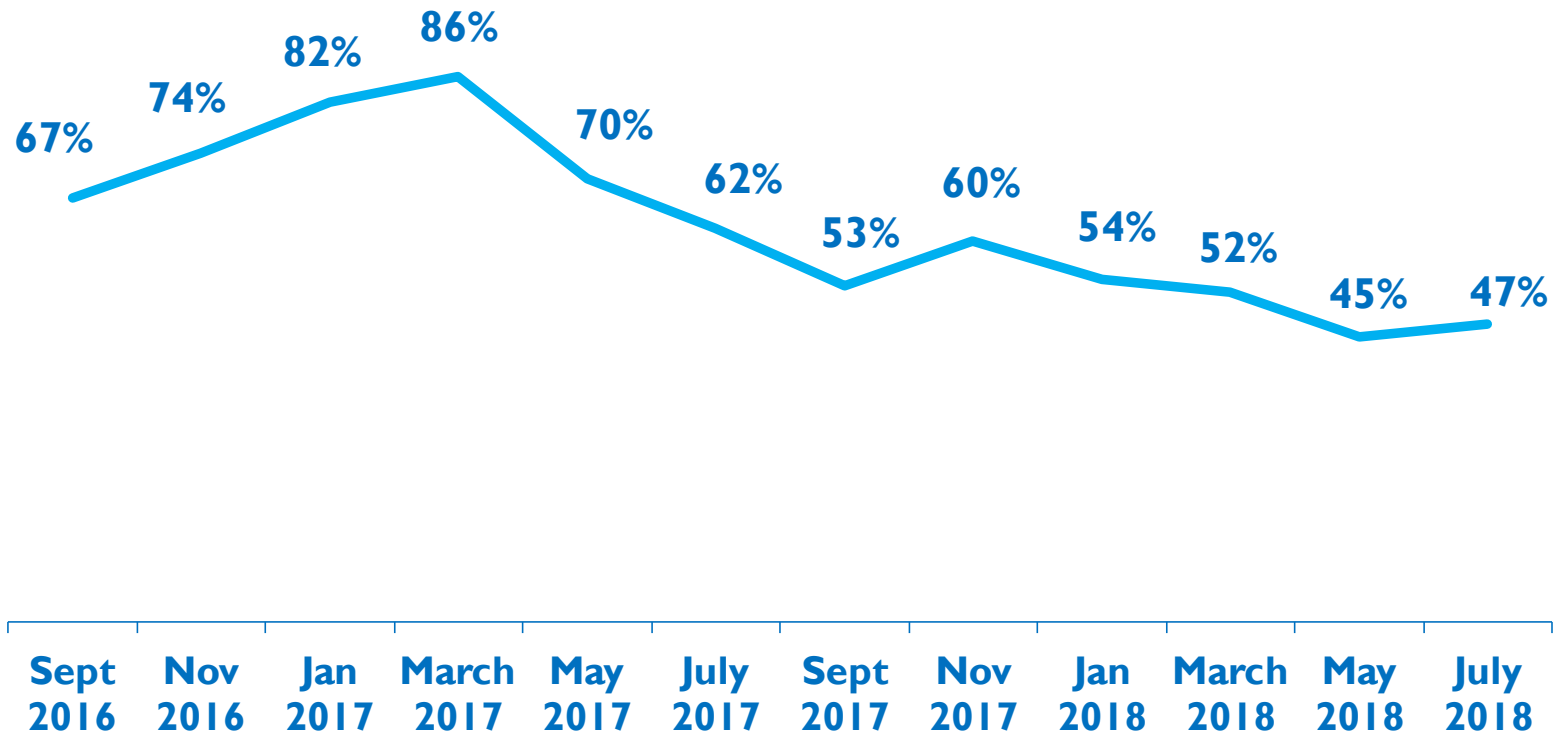
France returns as main declining market



45%

Not experiencing
decline from any
overseas markets.

Future business confidence levels remain low



Reasons for feeling confident in next 12 mths

“Forward bookings looking strong and new partners contracted. The only concern is a higher number of cancellations than normal over the past few months.”

Service Provider

“Ours is an industry that has always performed even on bad situation. There is always something interesting to see and do in England and the trade has not plateaued yet but it needs supporting.”

Accom. Provider

“2017 was overcast by Brexit and terrorism and we slowly see increasing numbers of bookings again.”

Tour Operator

“New marketing, membership of relevant organisations.”

Attraction

“Our confidence is centred on China ...and the creation of a Guildford App in Mandarin on Chinese social media.”

Destination



Reasons for feeling less confident in next 12 mths

“School bookings have decreased massively due to a number of reasons: safety concerns are still high on agenda and the funding cuts have affected our state school visit ratio.”

Attraction

“We seem to be working harder quarter by quarter but visitor numbers are plateauing off.”

Attraction

“London in general seems softer than 2017. Hotels undercutting FIT contracts left right and centre via dynamic streams, negative image of the UK in the press.”

Tour Operator

“Too much uncertainty with trade rules following Brexit!”

Attraction



Q6a. Why do you feel less confident about bookings/visitor numbers/customer orders for the next 12 months? Base: 27



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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