



Business Barometer Survey 2018

Key Findings

Sept 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 Sept2018**
- **54 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?

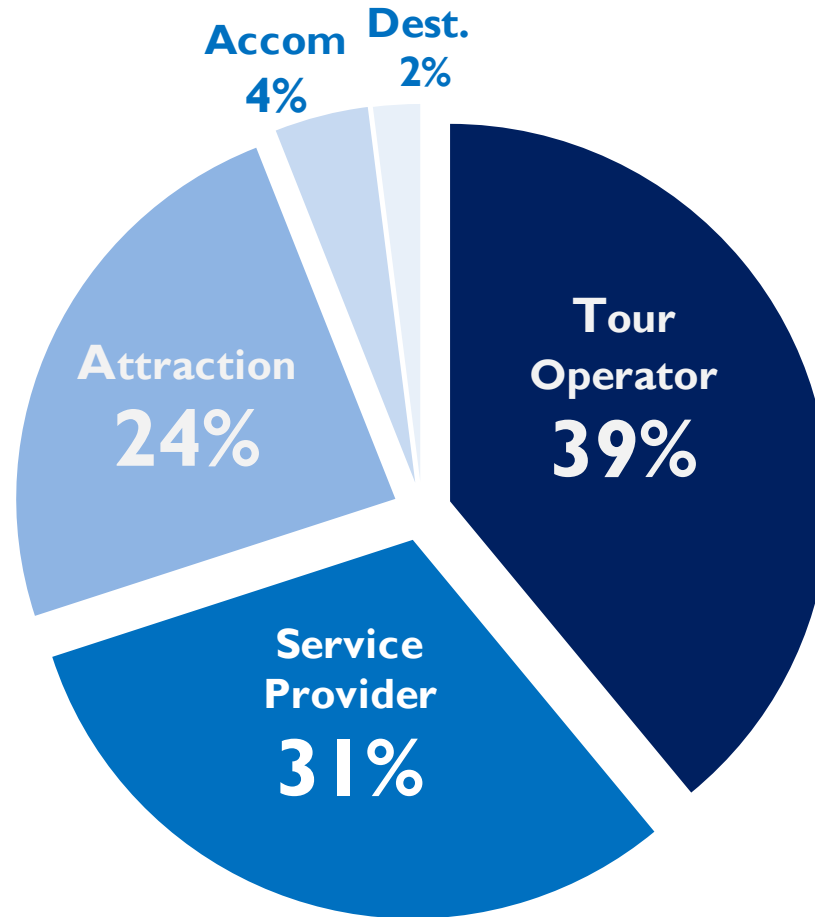
	Very positive	Positive	Neither no impact	Negative	Very negative
Air Passenger Duty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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"/>
UK&AT 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"/>

Feedback Next

Qa Research

UKinbound

Varied mix of sectors took part





RESULTS

Just over 1/2 (54%) felt they had increased business

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

On average, orders
DECREASED by

14%



Lower

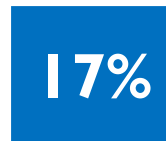
On average, orders
INCREASED by

25%



Higher

About the same



**Polarised summer
for attractions:**
Over 1/2 (54%) saw an
increase & 46% a
decline in visits

**Strong summer for
majority of TOs:**
57% saw an increase
in bookings

**Decent summer
for service
providers:**
59% saw an increase
in bookings



Why did your bookings / visitor numbers increase?

“Significantly more business from North America.”
Tour Operator

“Greater confidence in the industry generally, some new products and the decrease in value in GBP.”
Service Provider

“On the day sales higher as simply more footfall in London, increases from all markets, all segments - a refreshing change.”
Service Provider



“New agents. Improved offers. Better focus on international marketing.”
Attraction

“Stronger customer confidence in London after unsettled summer in 2017 (elections, terrorism).”
Tour Operator

Why did your bookings / visitor numbers *decrease*?

“Economic climate.”
Attraction

*“Terrorism in London/Novichok
in Salisbury.”*
Attraction

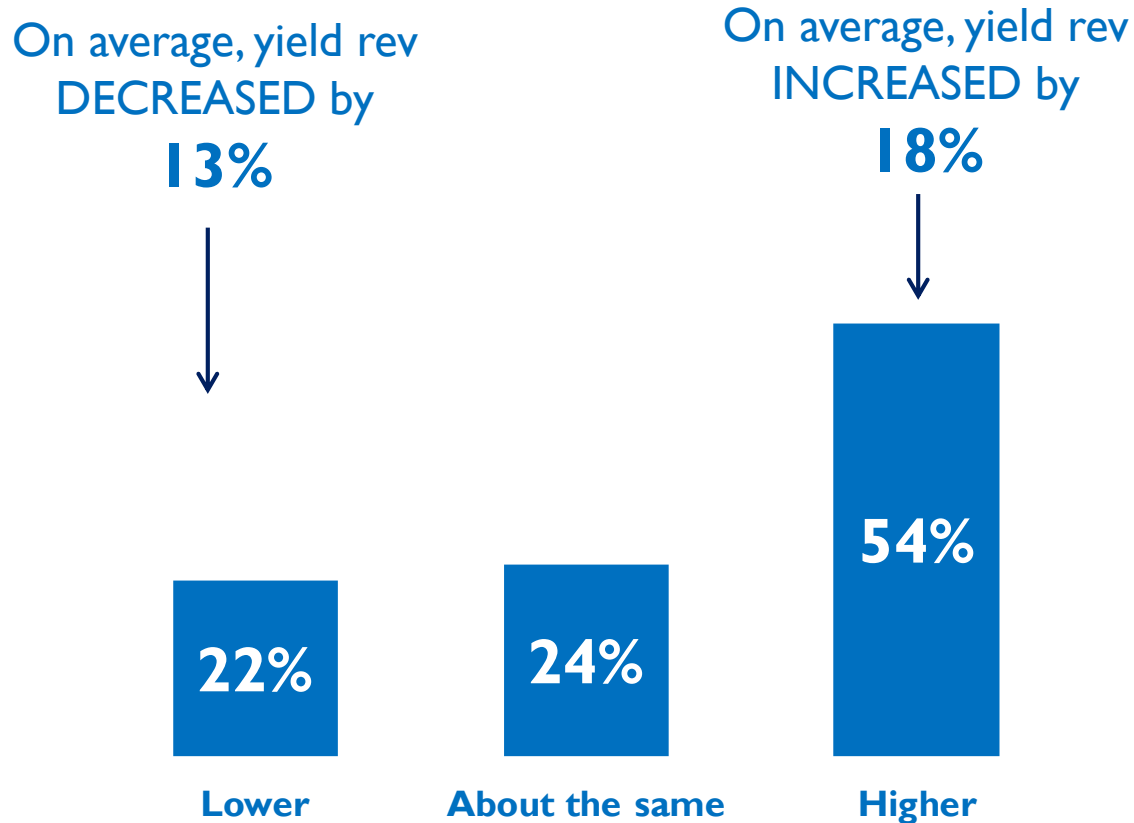
“Strength of Sterling - Brexit.”
Tour Operator



*“Weather perhaps too hot.
England world cup effect.”*
Attraction

Over half (54%) claimed increased revenue yield

In July & August 18 compared with the same months in 17



Mixed picture for attraction revenues

54% experienced an increase, 23% about the same & 23% saw a decrease

Majority of TOs saw no increase:

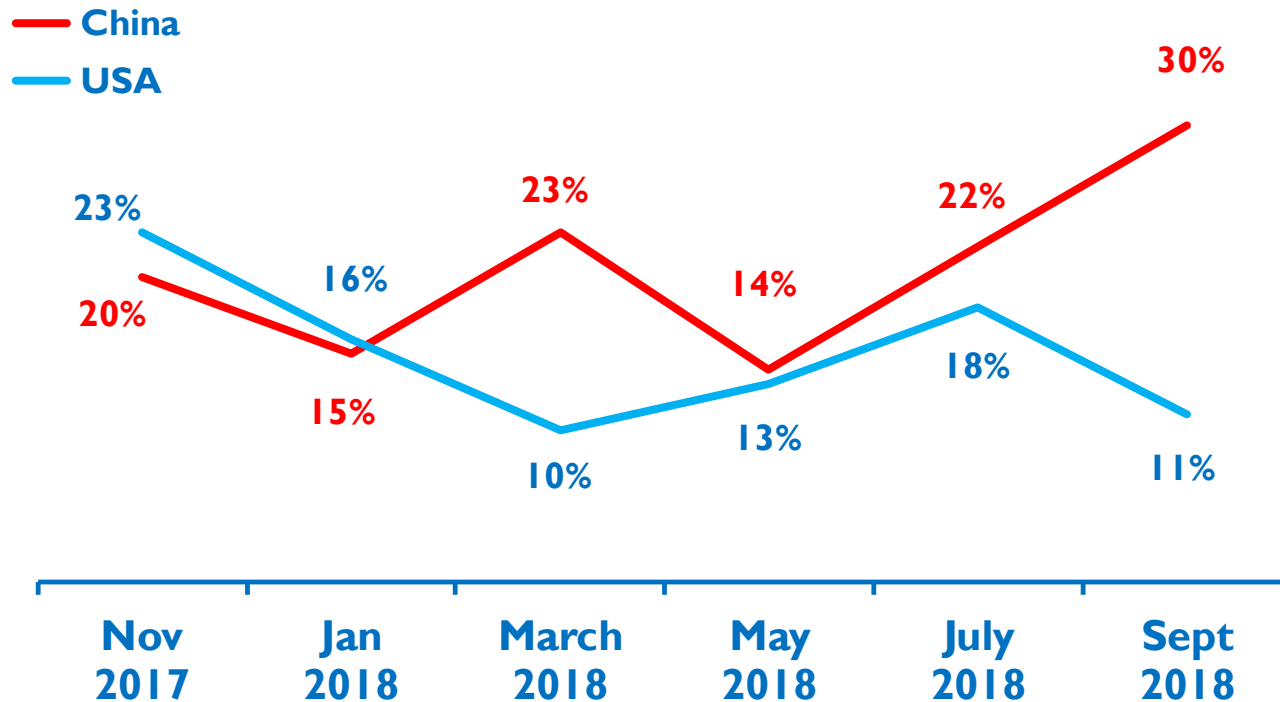
53% said about the same or lower

Service providers going strong:

65% saw an increase in summer revenues



China sees major boost as USA growth dips



17%
Not experiencing growth from any overseas markets



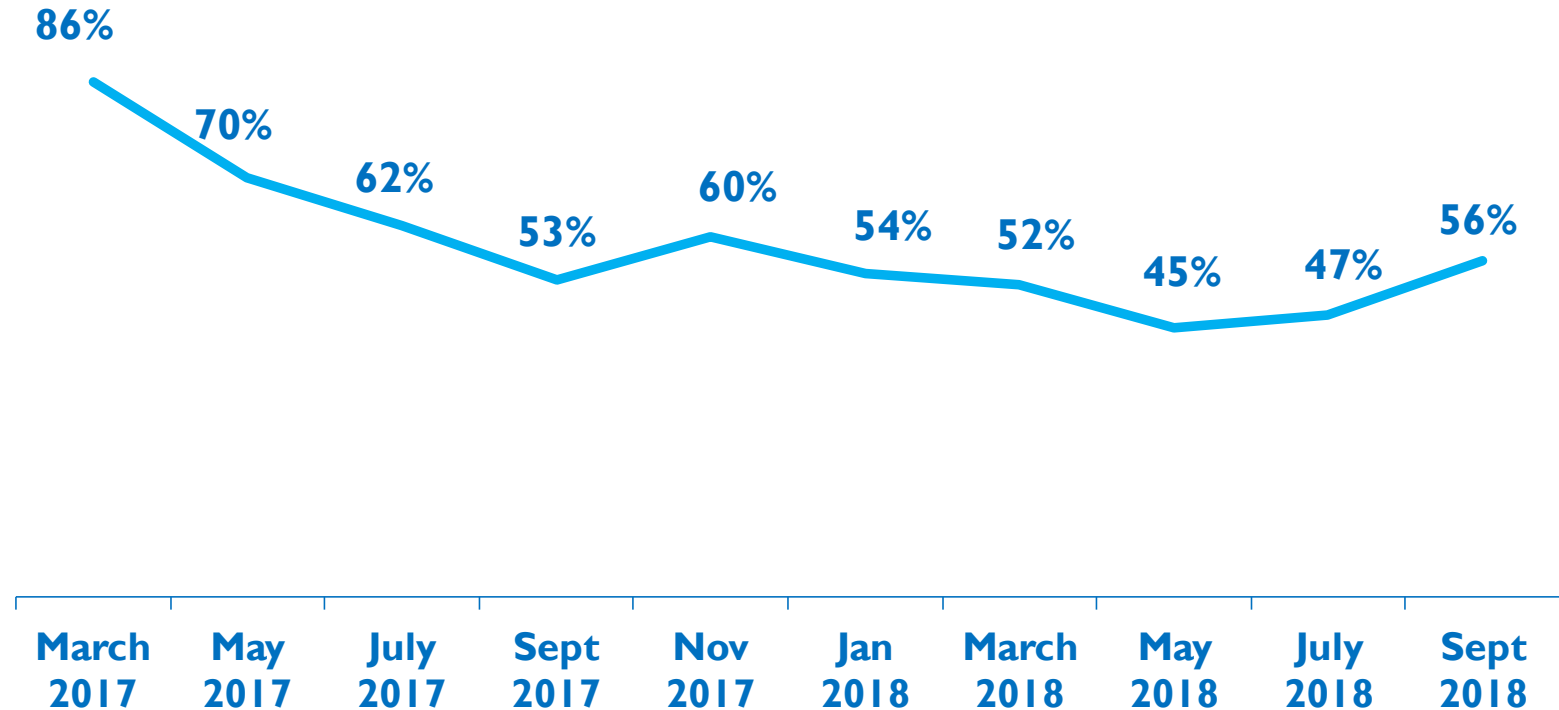
France remains as main declining market



46%

Not experiencing
decline from any
overseas markets.

Confidence in future business levels lifts slightly



Reasons for feeling confident in next 12 mths

“We can assume inbound tourism to Scotland will continue in the short term to remain strong. Also we plan to promote more product to FITs which is an area we have not pursued to date.”
Service Provider

“After a tough year last year, numbers seem to be picking up.”
Service Provider

“Increasing Chinese Market, and our ability to meet groups' specific needs.”
Tour Operator

“Good level of advance bookings. Secured strong deals with trade and tour operators for 2019-20.”
Attraction

Reasons for feeling less confident in next 12 mths

*“Brexit, uncertainty from
Government with 6 months to go.”*
Tour Operator





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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