



Business Barometer Survey 2018

Key Findings

Nov 2018



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Aims & method

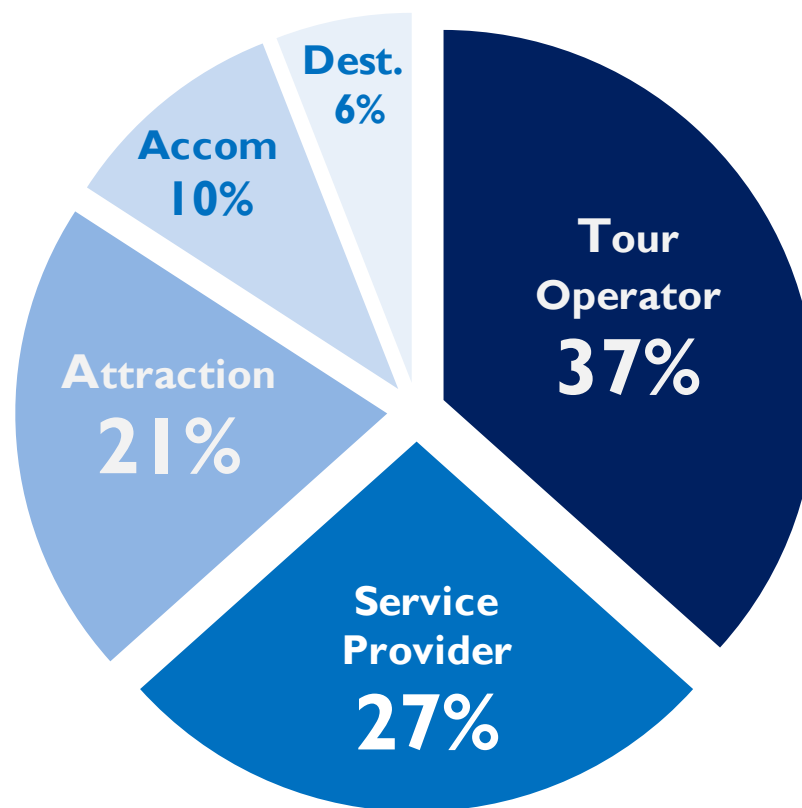
- **Business barometer survey of members**
- **The aims of the barometer are to:**
 - Understand how different membership sectors are performing
 - Determine the level of business generated by membership
 - Inform lobbying & PR activity
 - Enable UKinbound to react to industry developments more quickly,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

Q1: Which of the following factors are likely to impact future bookings? (check responses in either a positive or negative way over the next 12 months)

	Very positive	Positive	Neutral/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"/>
Wages	<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"/>
Support 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 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"/>

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Varied mix of sectors took part

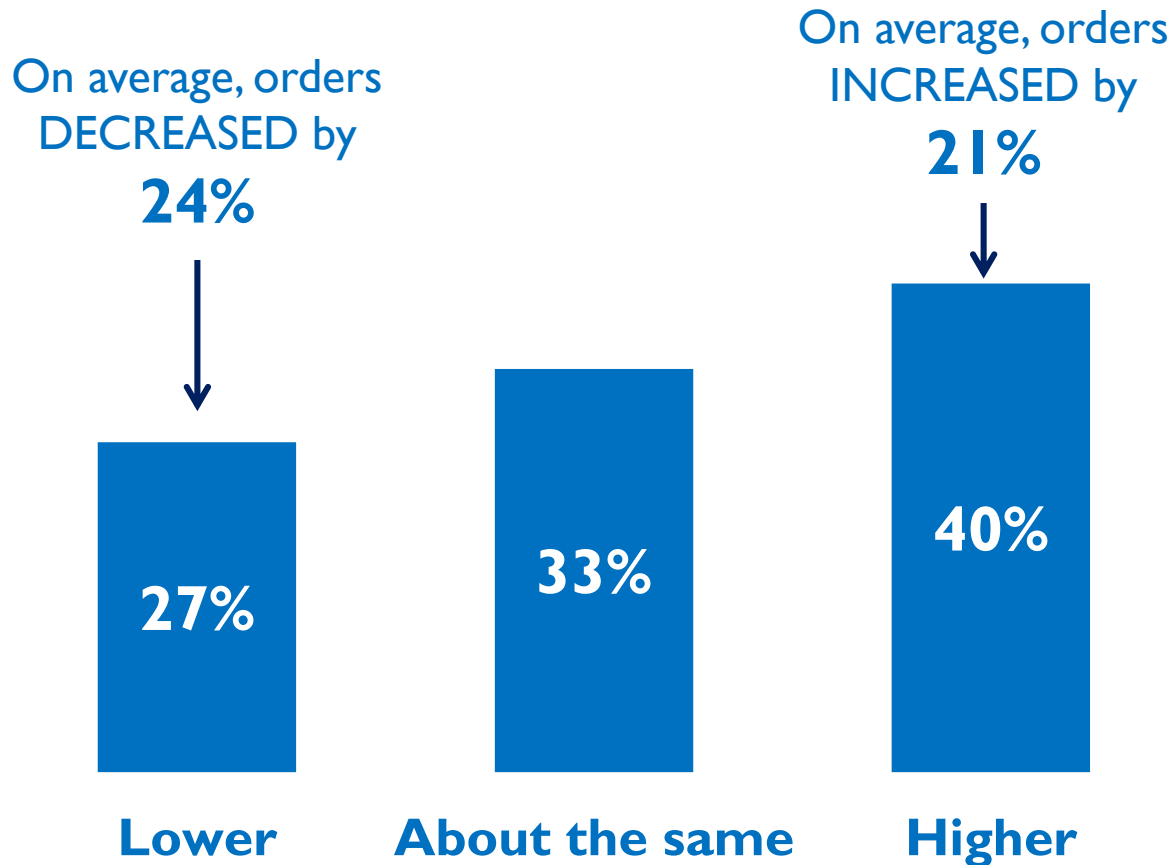




RESULTS

2 in 5 (40%) felt they had increased business

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



Attractions avoid decline in business:

Only 9% saw a decrease, 45% an increase and 45% about the same

Fairly strong autumn for many TOs:

42% saw an increase in bookings, although a ¼ (26%) saw a fall

Service providers fairly polarised:

43% saw an increase in bookings while 36% saw a decline

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

“Increased demand from Europe - weakness of pound versus euro.”

Tour Operator

“Stronger offer for clients, combined with less competition.”

Service Provider

“Good weather well into the autumn, comparing with a particularly difficult period last year.”

Service Provider



“Increase in Chinese and Japanese visitors.”

Destination

“The exchange rate I think helped bring more people who could now afford private tours.”

Tour Operator

Why did your bookings / visitor numbers *decrease*?

"Tough competition, Brexit uncertainty, higher cancellations on brochure business."
Attraction

"The uncertain political climate might have something to do with the decrease."
Tour Operator

"Huge shortage of European staff with the right skill set."
Service Provider

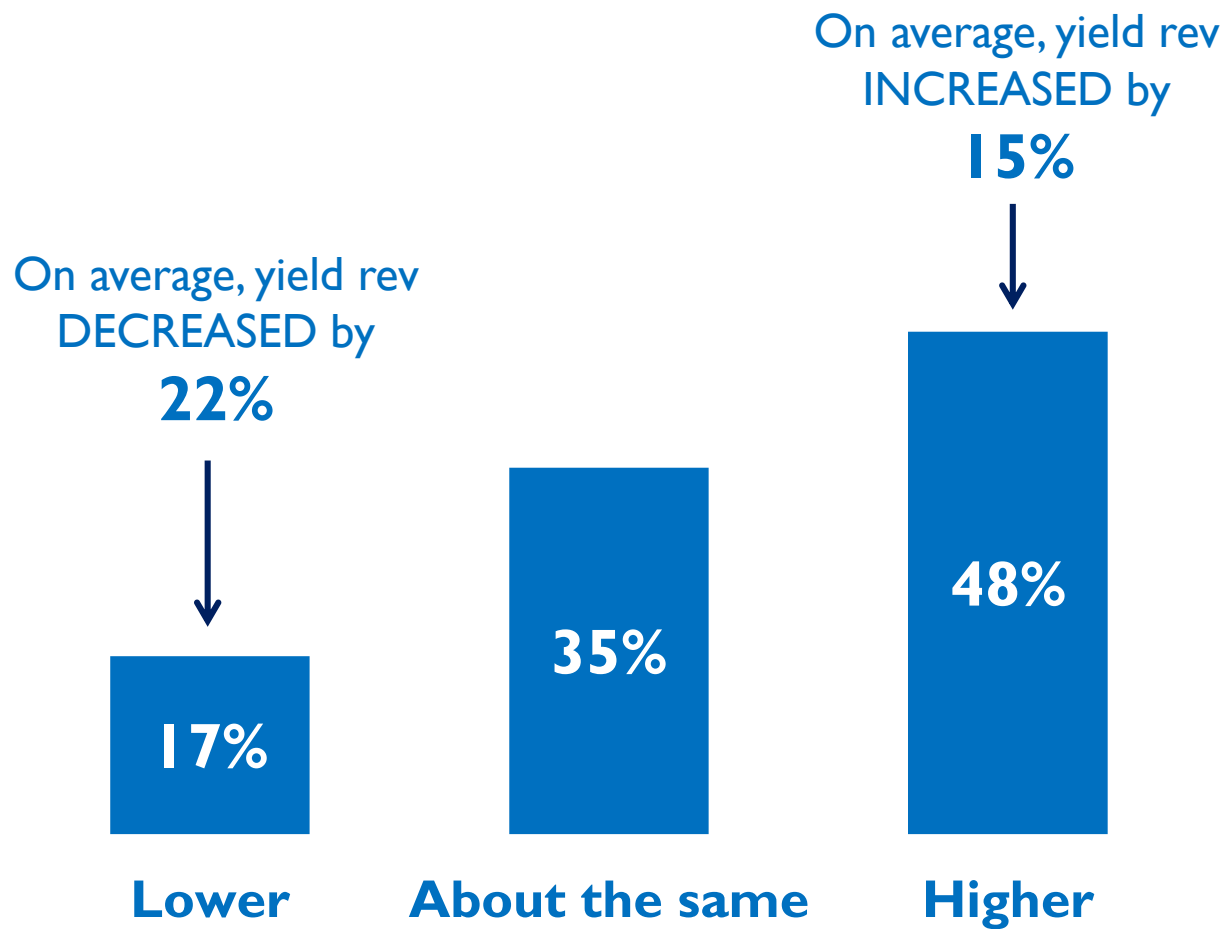


"Some larger clients have moved large parts of their business to Europe."
Service Provider

"Network disruption and bad weather."
Service Provider

Just under half (48%) claimed increased revenue yield

In Sept & Oct 18 compared with the same months in 17



Most attraction revenues remained static:

55% said about the same, 36% an increase and 9% saw a decrease in revenue

Majority of TOs saw an increase:

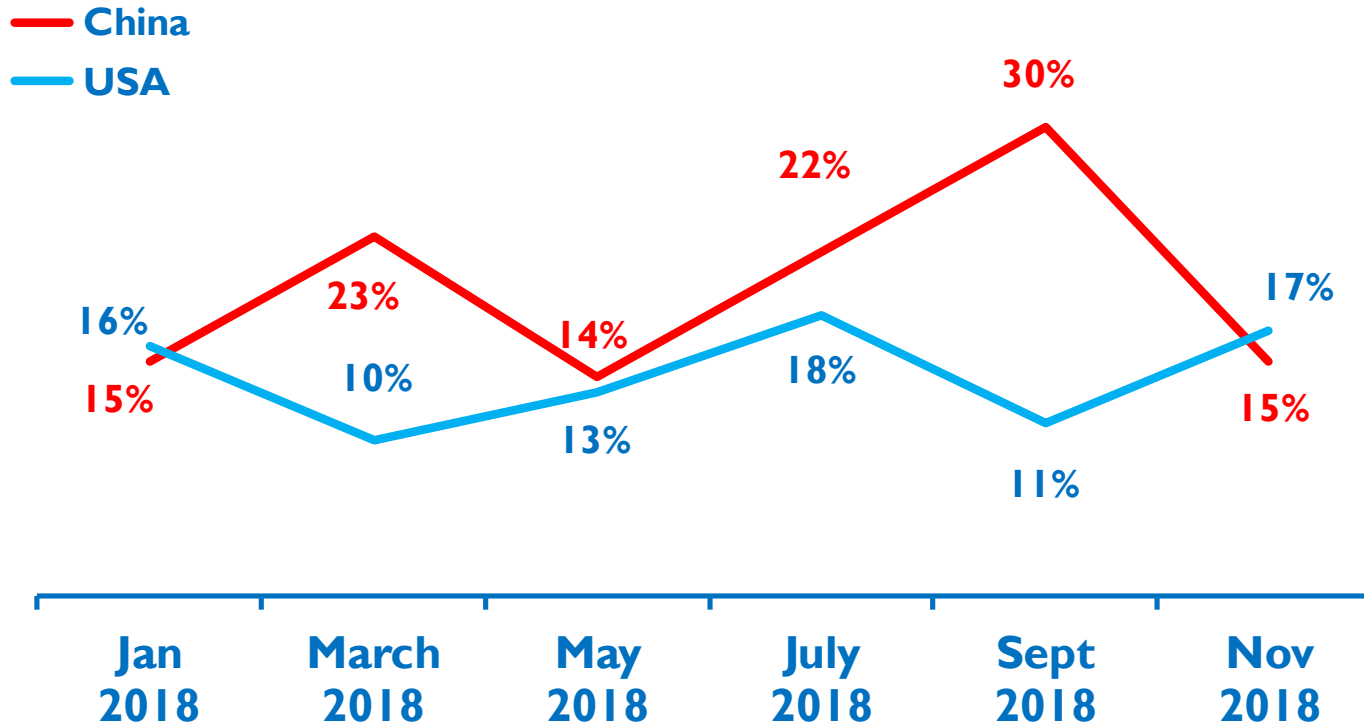
53% saw a higher revenue yield than last year

Service providers also going strong:

57% saw an increase in revenue this autumn



Growth in China market drops just below USA



37%

Not experiencing growth from any overseas markets



Q4. Select the main market that you are currently experiencing growth in. Base: 52

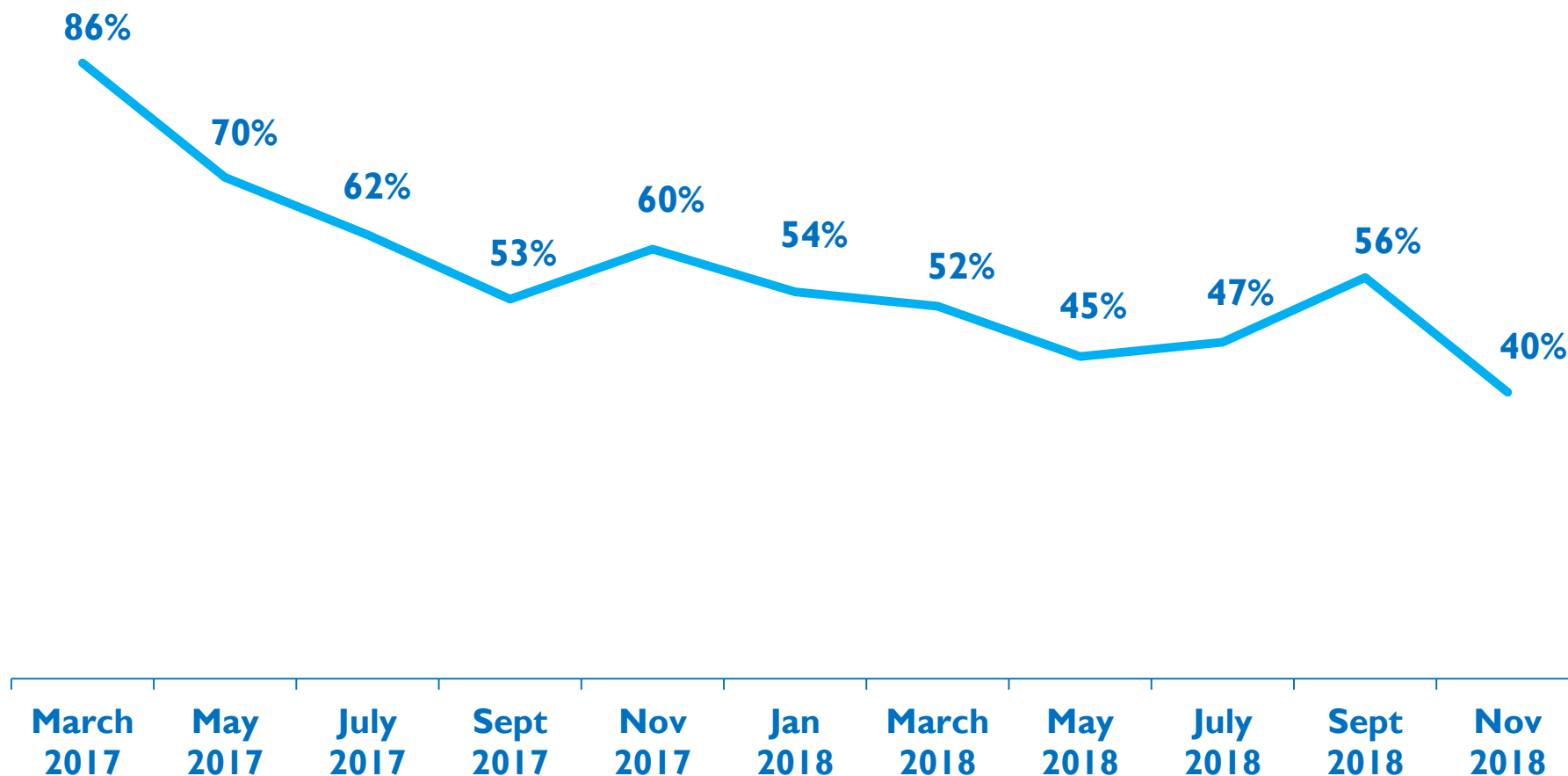
France remains as main declining market



54%

Not experiencing decline from any overseas markets.

Confidence in future business lowest in recent years



Reasons for feeling confident in next 12 mths

“More bookings already for next year than this time last year.”

Tour Operator

“UK remains a very competitive and valued destination.”

Service Provider

“Connections to China, with two inbound agencies from China based in the town with whom we have strong relationships.”

Destination

“Yorkshire getting more on the map.”

Tour Operator

“Visitors do not seem to be deterred by Brexit.”

Tour Operator



Reasons for feeling less confident in next 12 mths

“Brexit means more companies moving out of London and lack of European speaking staff.”

Service Provider



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