

# Business Barometer Survey 2019

## Key Findings

July 2019



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 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 2019, followed by telephone top-up**
- **96 members completed the survey, 24% of the membership base**
- **Many thanks for taking part!**

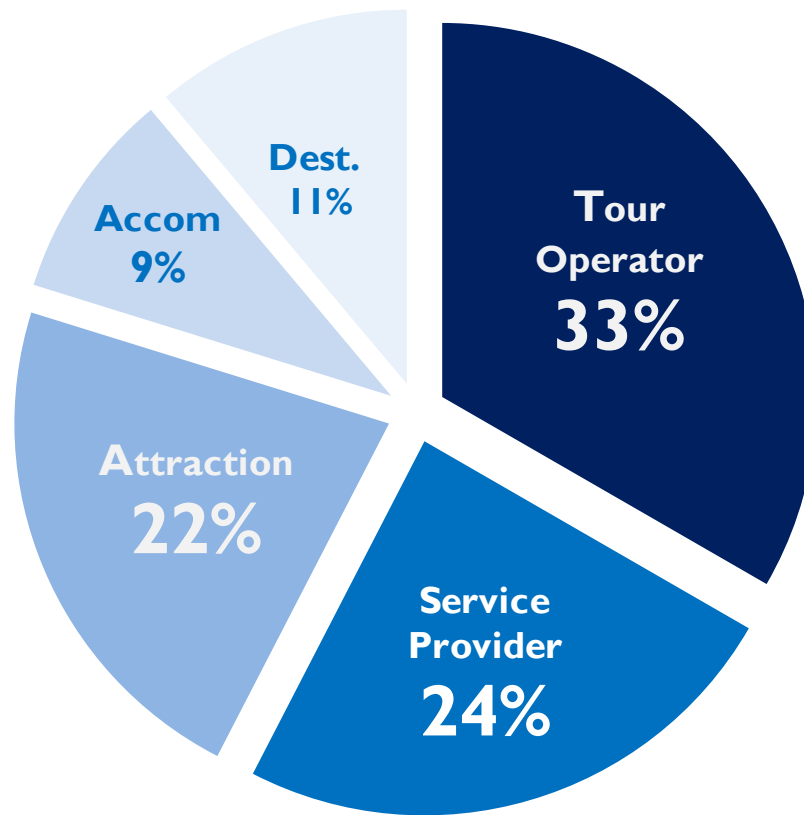
Q1 Which of the following factors are likely to impact future bookings / visitor revenues in your business or region in the next 12 months?

	Very positive	Positive	Neutral	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 products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of visits 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"/>
Ease of access to UK airports	<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"/>

PREVIOUS NEXT

Qa RESEARCH

# Varied mix of sectors took part

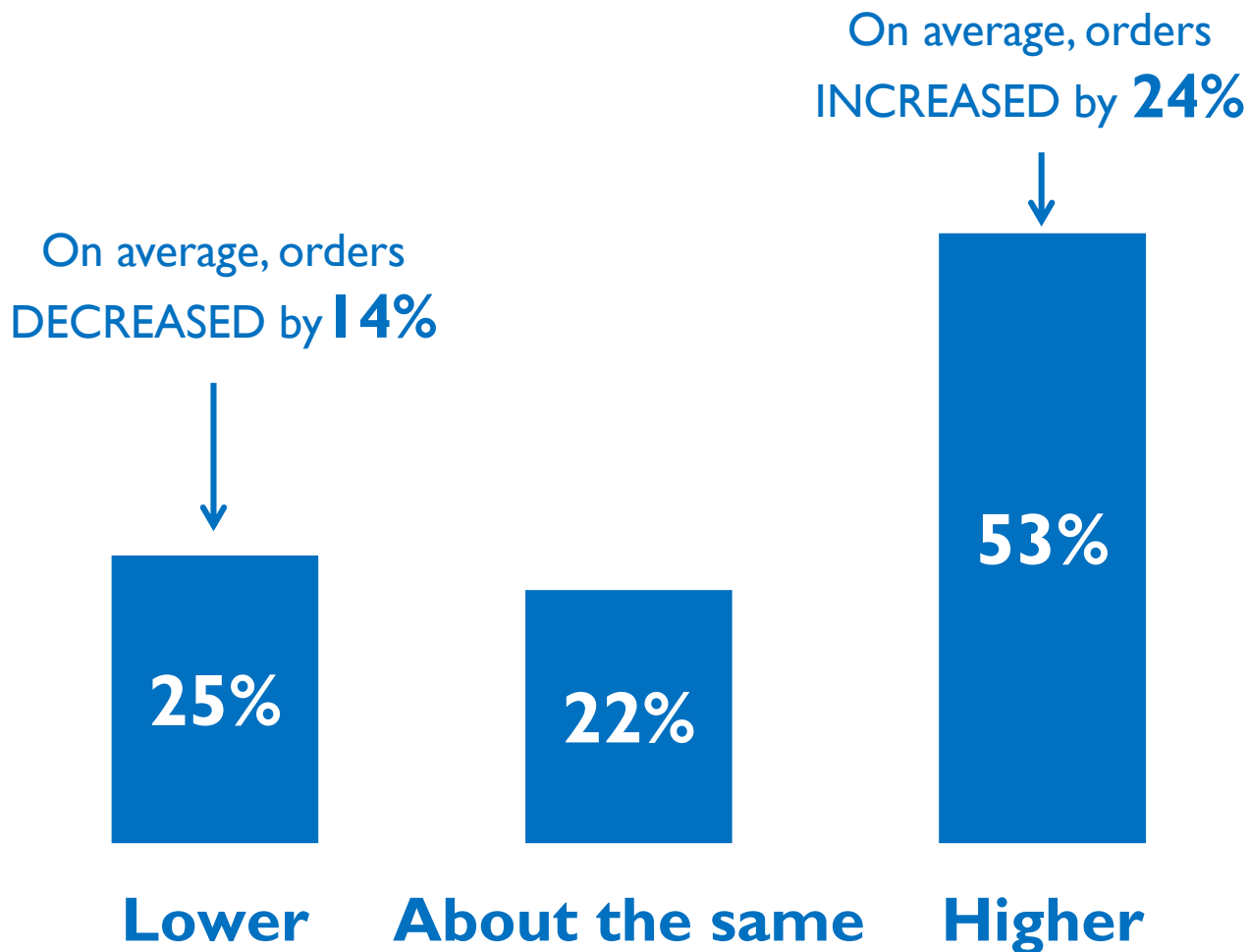




RESULTS

# Over half (53%) had increased business

In May & June '19 compared with the same months in '18  
with bookings/visitor numbers/customer orders



**Solid increases for service providers:**  
Over three in five (61%) saw increased bookings

**Mixed fortunes for Tour Operators:**  
While 44% saw an increase in bookings, nearly a third (31%) saw decreases



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

“Large increases from EU countries + North America.” - **Tour Operator**

“Better Easter, staycation a factor. Uncertainly over income / jobs / Brexit encouraging stays in the UK.”- **Destination**

“Due to events/ activities/ festivals around the hotels and the good weather and this is for the UK guests. We received less from overseas.” - **Accommodation**



“Continued robust inbound tourism traffic to Scotland and tendency for staycations.” – **Service Provider**

“More visible with UKinbound, more tour operators have been able to get in touch.” - **Service Provider**

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

*“Brexit has had a big hit on visitors coming over which has impacted on the town. In particular it has hit people coming from Europe with families. The numbers have diminished..” - **Tour Operator***

*“Europeans have decided not to travel to the UK as much as last year.”  
- **Service Provider***

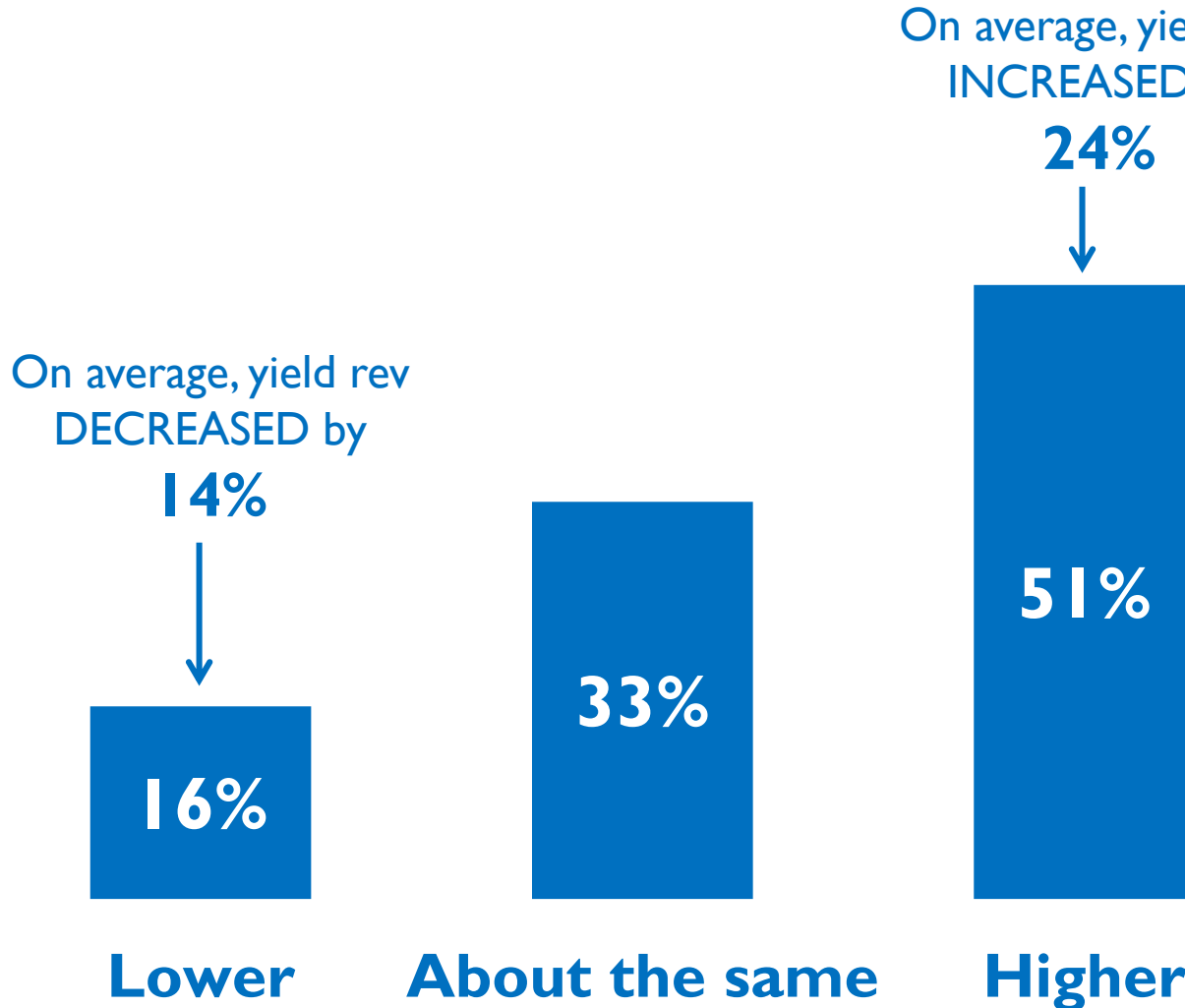


*“More cancellations and larger wash on Group Series from European groups.”  
- **Accommodation***

*“Brexit is taking a large part. The market is affected due to the uncertainty. We noticed the same in February near the deadline and people were more confident. Then the date was delayed again which leads to uncertainty..” - **Destination***

# Half of members (51%) increased revenue yield

In May & June '19 compared with the same months in '18



**TOs see steady business:**  
Majority of TOs saw either similar (31%) or increased (53%) yields compared to last year

**Service providers largely prospering:**  
Over half (52%) increased yield, 39% remained static. Only 9% saw a decrease

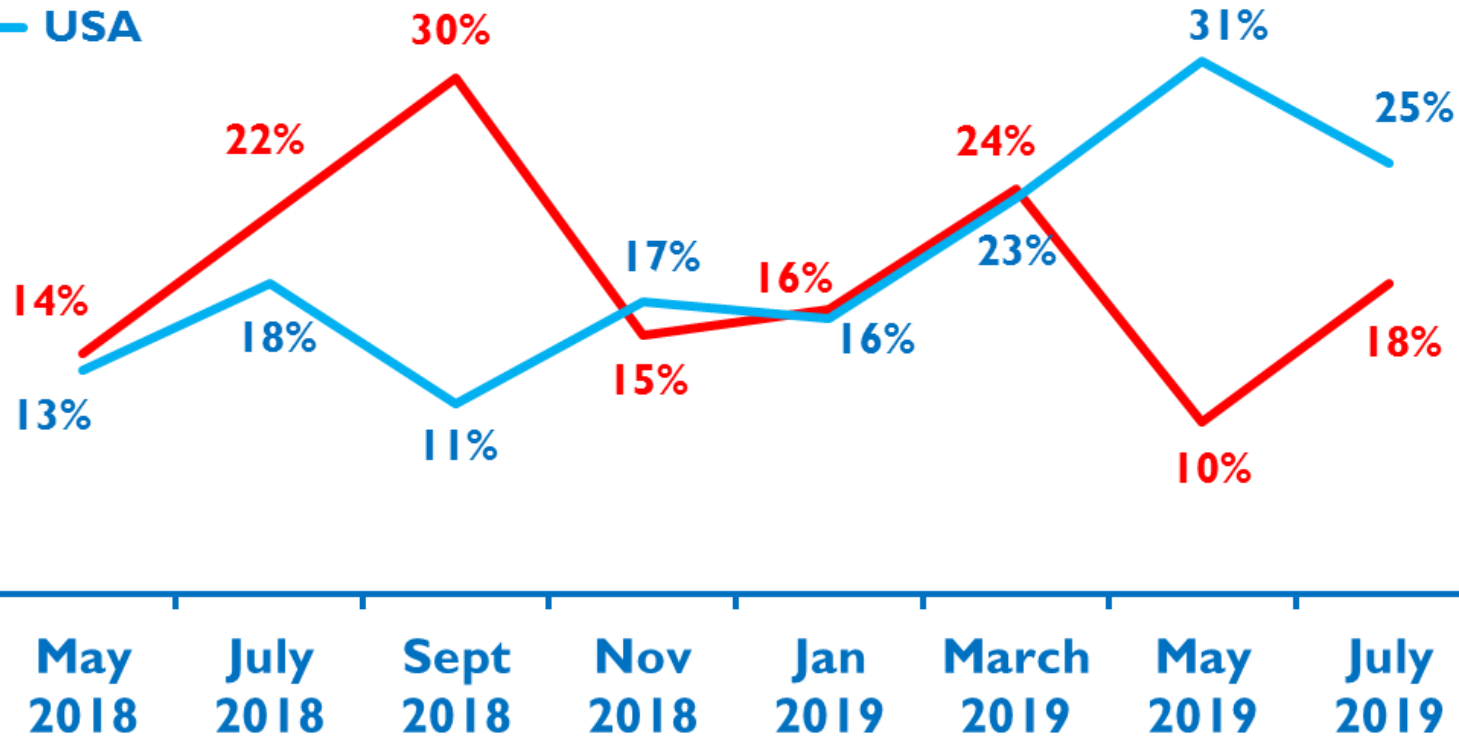
**Attractions struggle:**  
29% saw a decrease in yield compared to 2018





# China market growth recovers slightly, while USA drops

— China  
— USA



**20%**

Not experiencing growth from any overseas markets

**5%**

Experiencing growth from Indian market

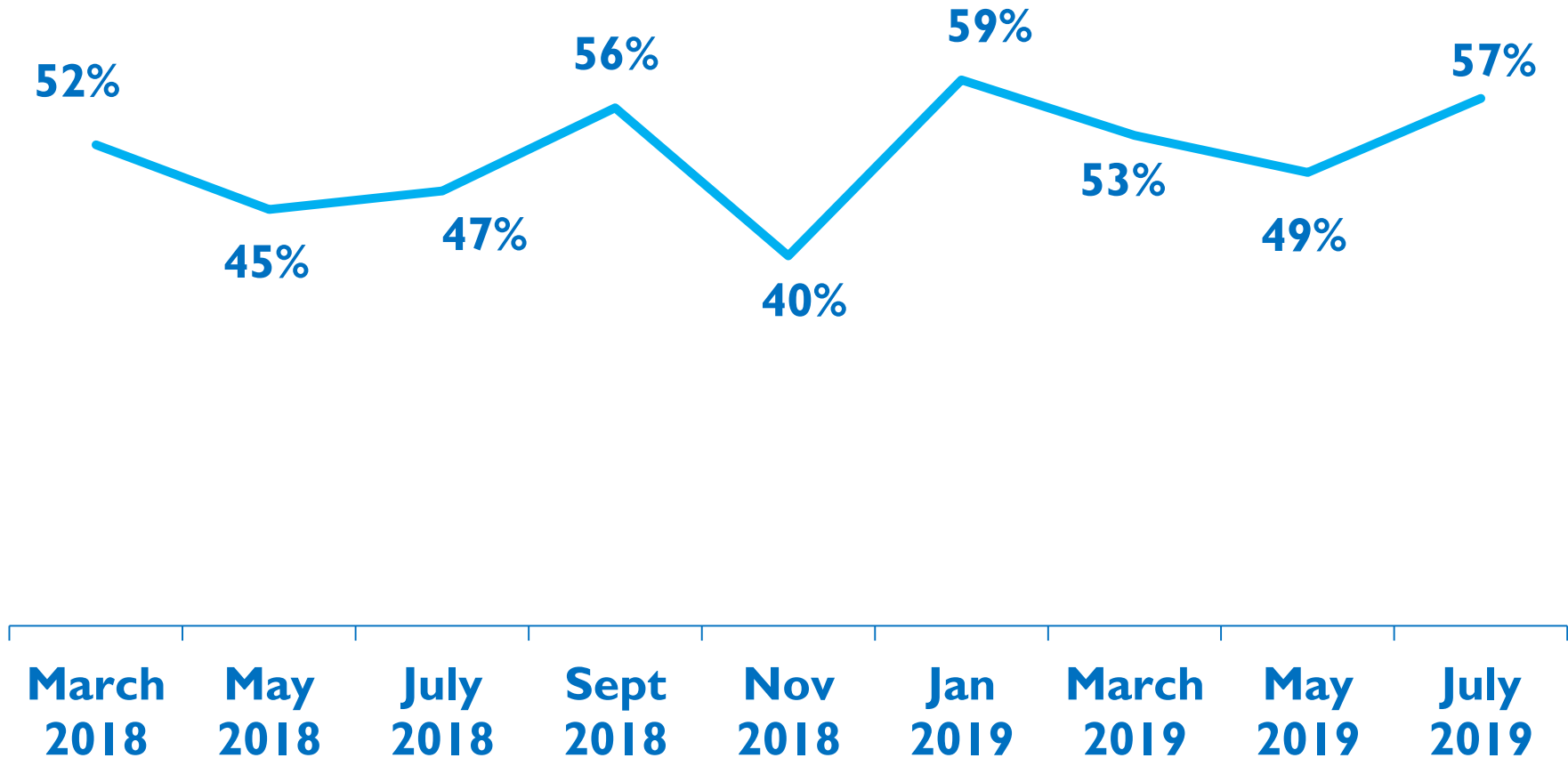


# German & French markets show greatest decline



**40%**  
Not experiencing decline from any overseas markets.

# Confidence in future business levels rises to over half



# Strong bookings & weak £ spark confidence in coming year

*“Both the American, Canadian and French markets are looking strong but we are still sceptical about Brexit, which is why I would not say 'very confident'.”*

**Tour Operator**

*“We already have good advance bookings for the next 6 months.”*

**Attraction**

*“We have seen an increase in group booking enquiries.”*

**Accommodation**

*“Cautiously optimistic on recovery economy and safety wise. Pound still weak and London still attracting tourists.*

*Domestic market bouncing back.”*

**Service Provider**

*“I am very confident because prices are good, £ is cheap for EUR destinations and also for US clients travelling to England.”*

**Tour Operator**



Q6a. Why do you feel confident about bookings/visitor numbers/customer orders for the next 12 months? Base: 55

# 'Brexit' concerns dominate low confidence

*"Brexit uncertainty. Having a new prime minister and what government there will be. People are uncertain about spending as they are unsure about their jobs."*

**Destination**

*"I have just noticed that are people are not coming away as much. we are not seeing as many UK numbers through the door."*

**Attraction**

*"Brexit uncertainty which is killing European business."*

**Tour Operator**

*"There is latent demand but we have to get the BREXIT situation sorted before the confidence in the destination returns."*

**Tour Operator**



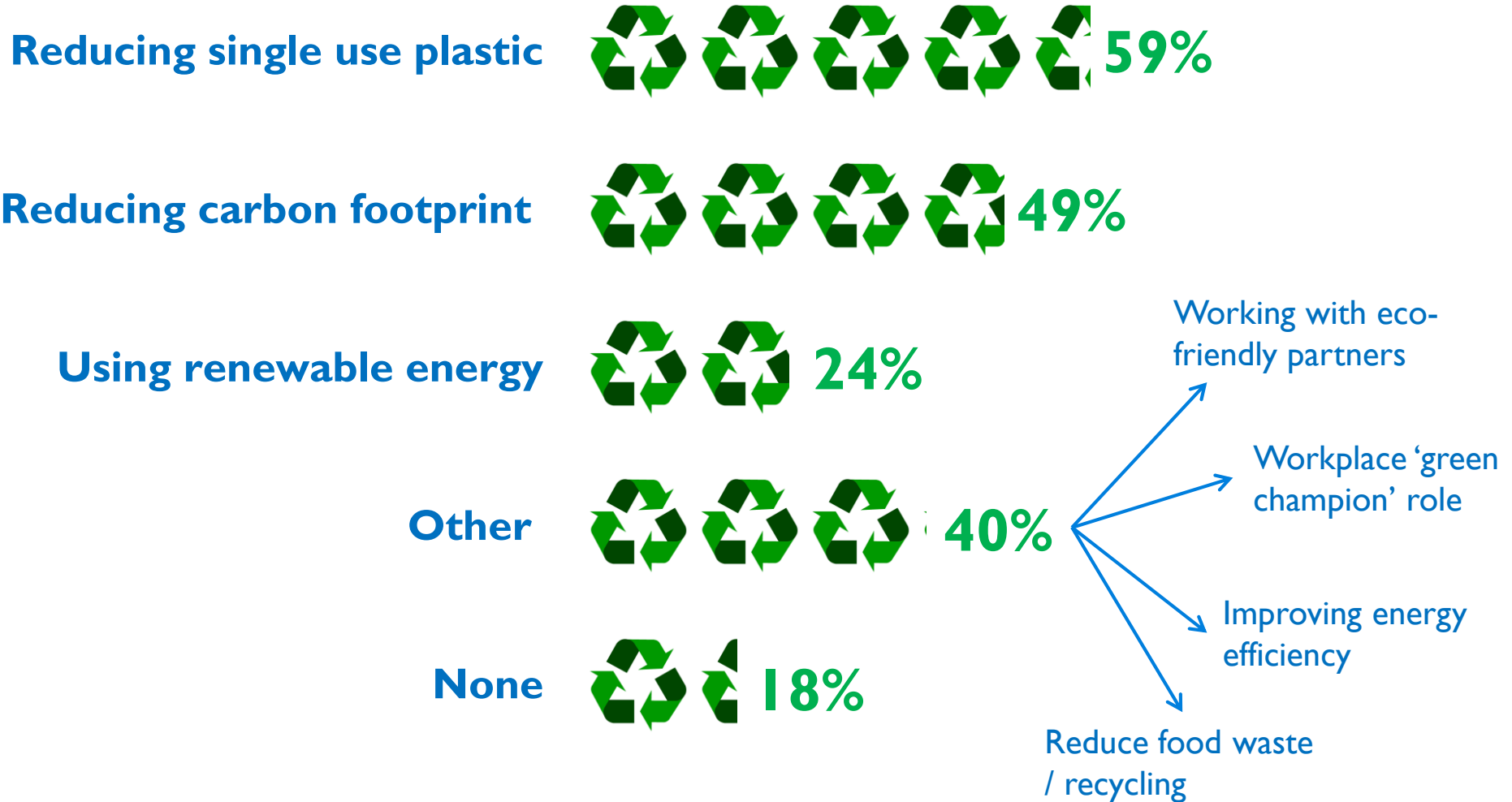
# 81%

find it  
'important' or  
'very important'  
for their business  
to minimise  
environmental  
impact



Q7. How important is it to your business and the products/services you provide to minimise their environmental impact? ? Base: 96

# Businesses engaging with a range of eco-strategies





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.



## Contact ...

*Richard Bryan*

[richard.bryan@qaresearch.co.uk](mailto:richard.bryan@qaresearch.co.uk)

[www.qaresearch.co.uk](http://www.qaresearch.co.uk)

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



Qa Research is a trading name of QA Research Ltd, UK registered,  
company registration number 3186539, address in York as above.

