



UKINBOUND
THE VOICE OF INBOUND TOURISM

Business Barometer Survey 2020

Key Findings

April 2020



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Aims & method

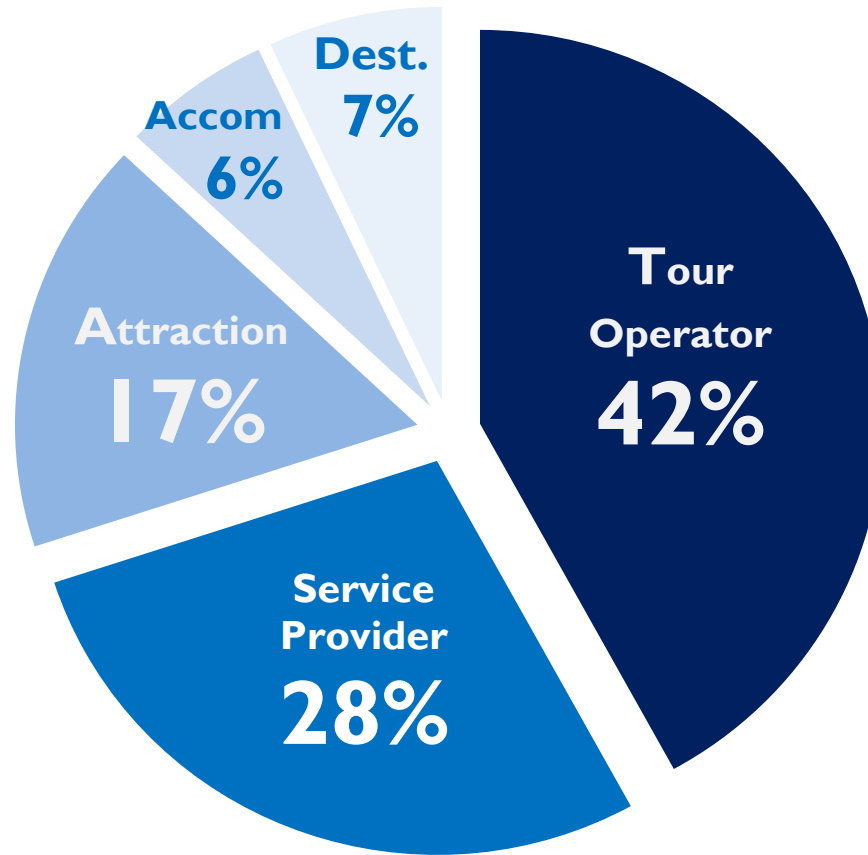
- **Business barometer survey of members**
- **The aims of the barometer are to:**
 - Understand how different membership sectors are performing
 - Determine the level of business generated by membership
 - Inform lobbying & PR activity
 - Enable UKinbound to react to industry developments more quickly, by gathering feedback on current issues impacting the tourism industry
- **Online survey sent to members April 2020, followed by a telephone top-up exercise**
- **71 members completed the survey, 18% of the membership base**
- **Many thanks for taking part!**

Q1. Which of the following factors are likely to impact future bookings / visitor revenues in 2020? a positive or negative one over the next 12 months?

| | Very positive | Positive | Not an 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"/> |
| Attraction 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"/> |
| 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 what 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

More than two thirds (70%) of members saw a decrease in bookings

In January, February and March 2020 compared with the same months in 2019
with bookings/ visitor numbers/ customer orders

On average, orders
DECREASED by **55%**

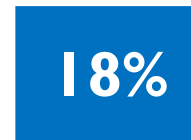


Lower

On average, orders
INCREASED by **19%**

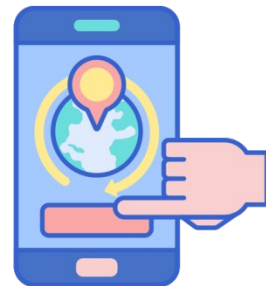


About the same



Higher

When looking at results by
indivual sectors the results were
similar to the overall picture.



*“January 2020 was 100% higher.
February was 40% higher when
the Coronavirus impact started.
March was 50% lower.”*

Service Provider

Three quarters of members (75%) saw a decrease in yield

In January, February and March 2020 compared with the same months in 2019

On average, yield rev
DECREASED by

56%



Lower

On average, yield rev
INCREASED by

21%



About the same

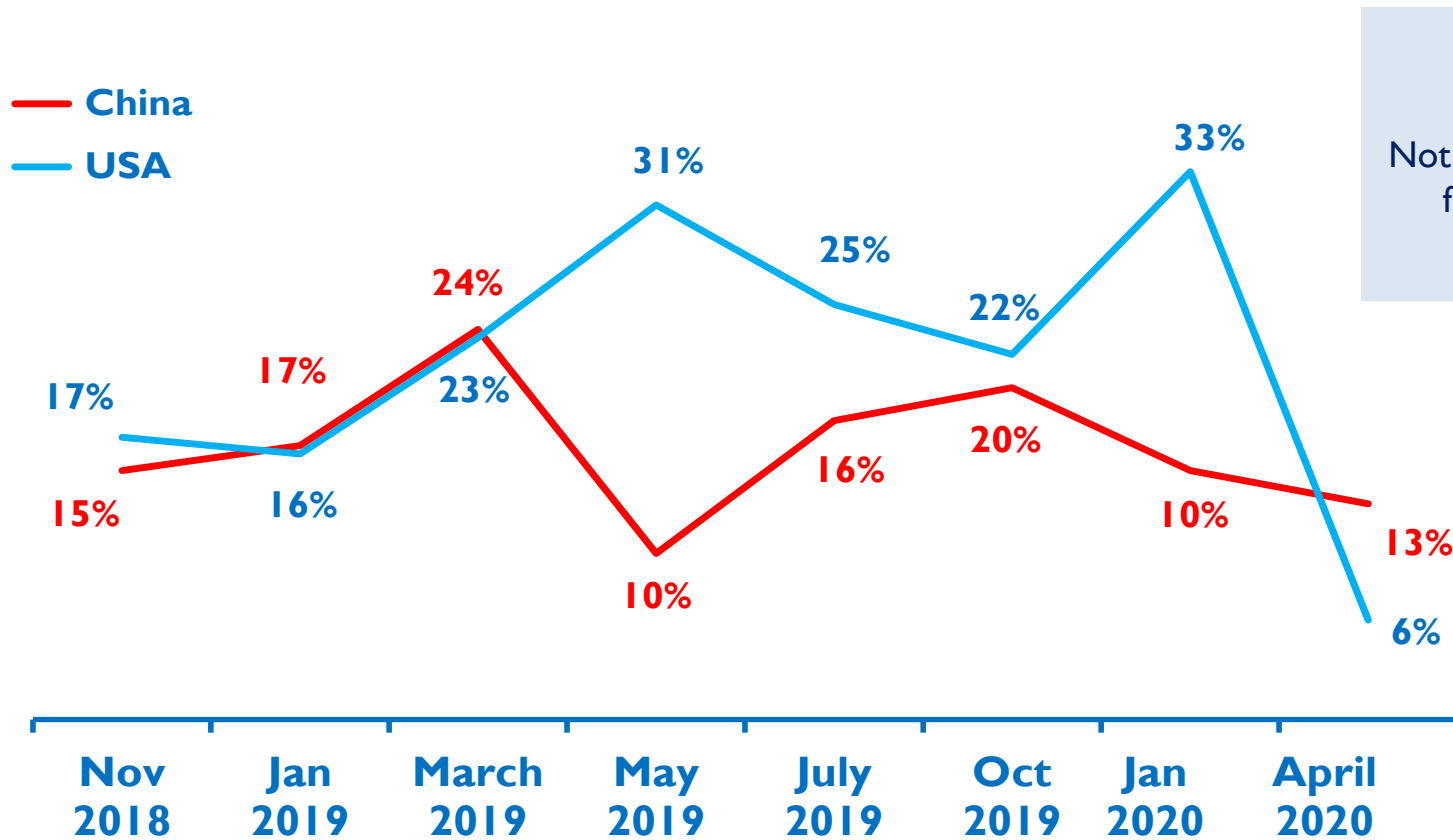


Higher

When looking at results by individual sectors the results were similar to the overall picture.



China and USA cited as main growth markets but fall rapidly



65%
Not experiencing growth from any overseas markets.



USA and China were also the main markets in decline

14%

Saw decline from
US market



13%

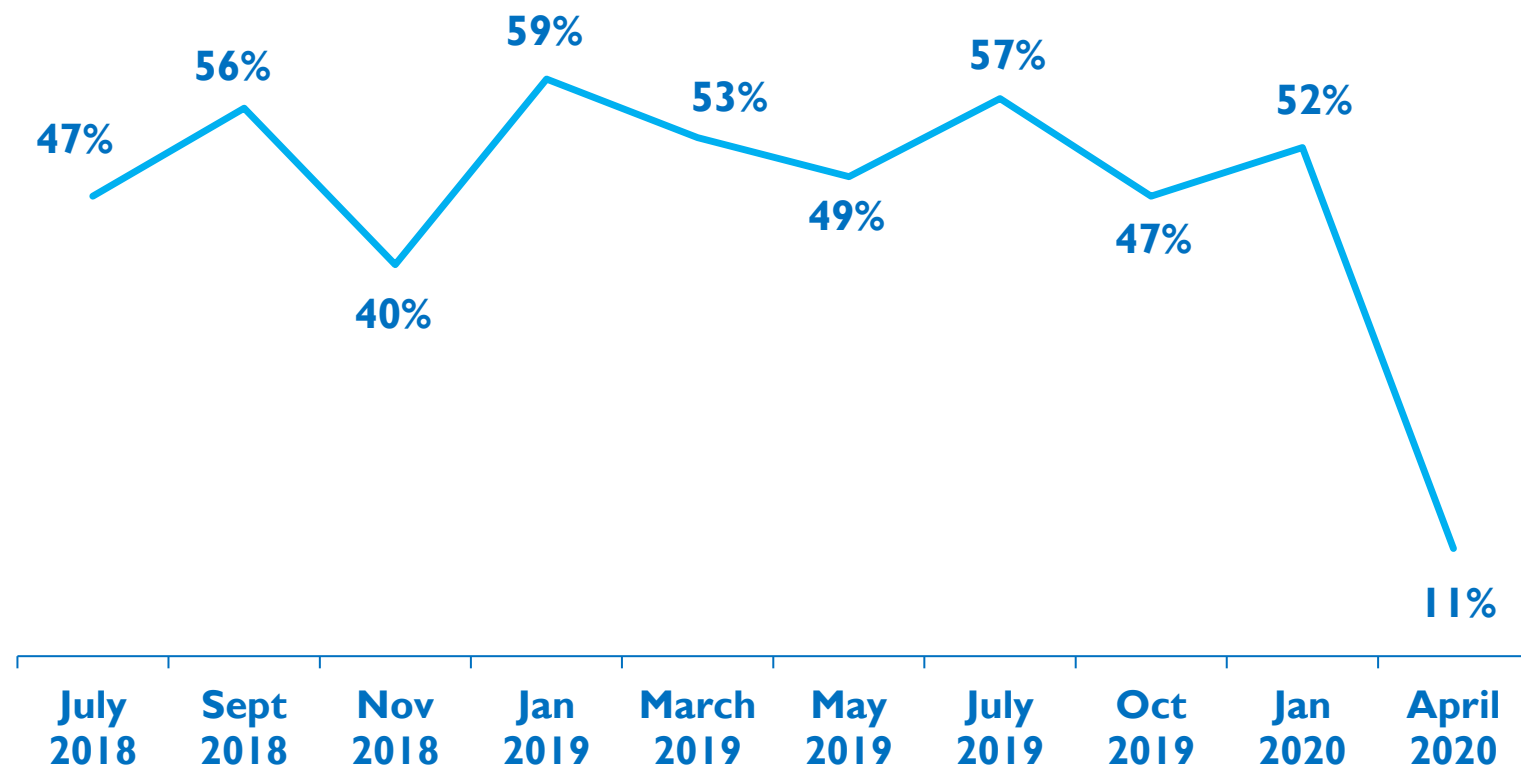
Saw decline from
China market



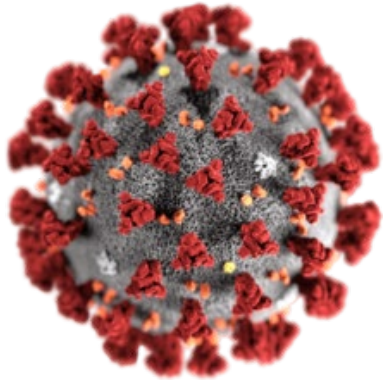
39%

Not experiencing
decline from any
overseas markets.

Confidence in the next 12 months hit all time low



COVID-19 causing great distress to members confidence



“Business has stopped, hotels are closed and bookings have mostly cancelled, few bookings have been moved to next year at a lower rate than we would have expected to charge for 2021.”

Accommodation Provider

“I am fairly confident with local domestic demand, I am just not sure whether or not we can fulfill that due to social distancing regulations. In addition, groups won't come back very quickly, particularly international and school - which was an area we were experiencing growth from.”

Attraction

“It's because business for the entire year has been cancelled. The fact that we operate with people abroad makes it hard - even if the UK returns to normal, we need everywhere else to return to normal as well before people really feel comfortable traveling.”

Tour Operator

“We are hearing that people will only be safe to travel when a vaccine has been developed which is 18 months away!”

Tour Operator

Client contact and domestic market potential help some feel confident

“Regular contact with key clients who are predicting strong bounce back post Covid-19.”

Tour Operator

“Domestic will resume in the first place.”

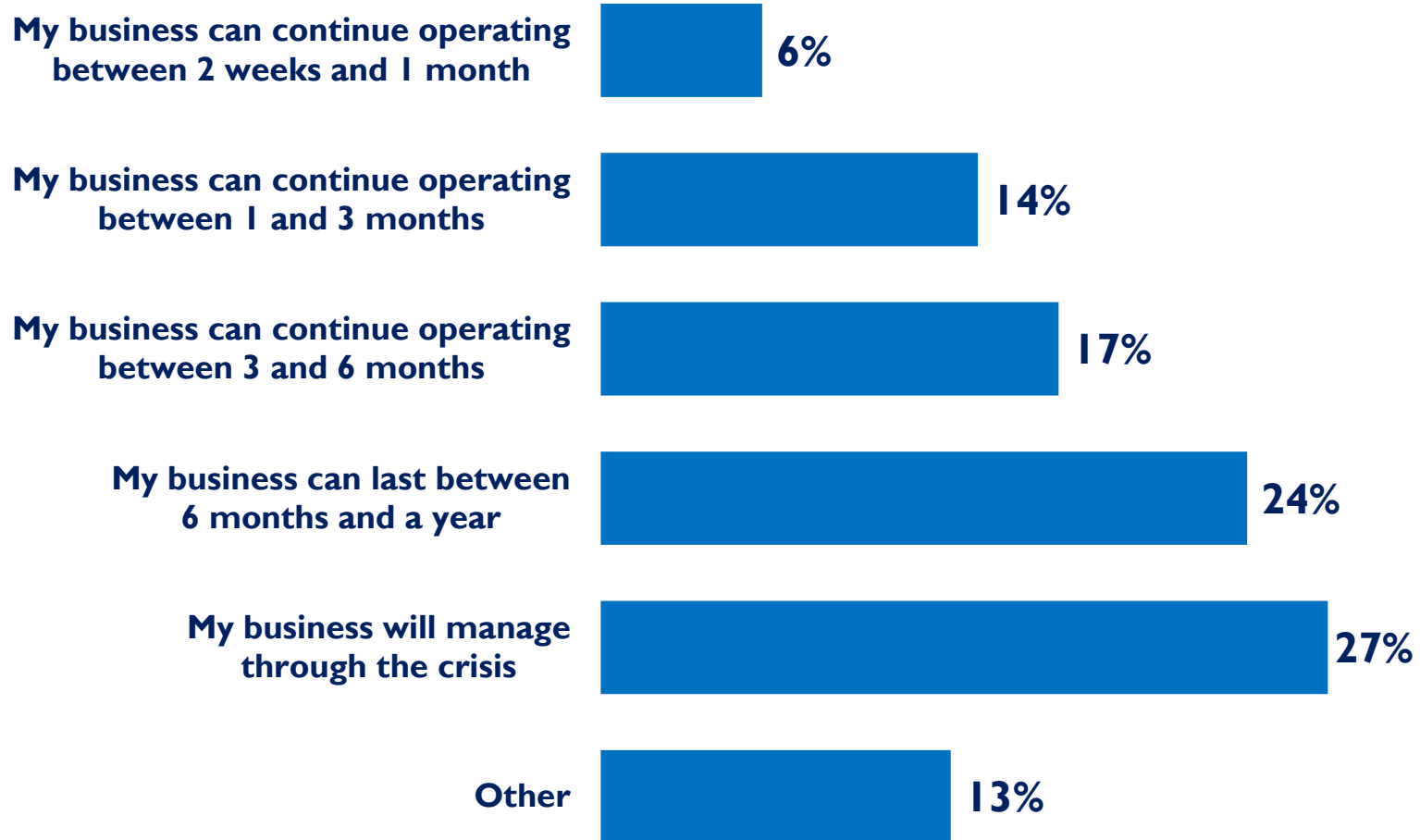
Service Provider

“Our clients are worldwide and those who could not travel in the early part of this year have already re-booked for the latter part of the year and for next year.”

Tour Operator



Almost two fifths (37%) may not survive longer than 6 months





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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