



Business Barometer Survey 2025-26

Key Findings

October 2025



UKINBOUND

THE VOICE OF INBOUND TOURISM



QaResearch

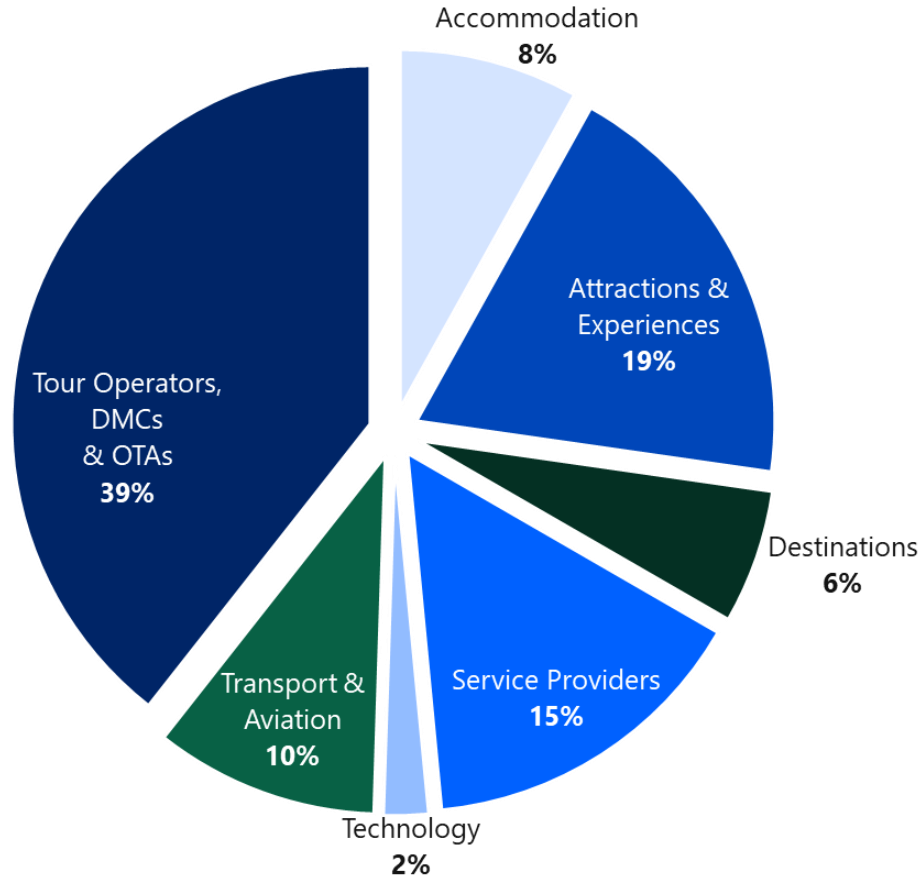
Aims & Method

- **Survey of members:** your chance to have a say on how things are going
- **Main aims:**
 - 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 in September 2025, followed by a telephone top-up
- **Looks forward to October, November and December 2025:** the emphasis on this survey focuses on the upcoming quarter
- **Good response from members: 110** members completed the survey, **22%** of the membership base

Many thanks for taking part!



A range of tourism sectors participated



Q0. Which membership category do you fall into? Base: 110

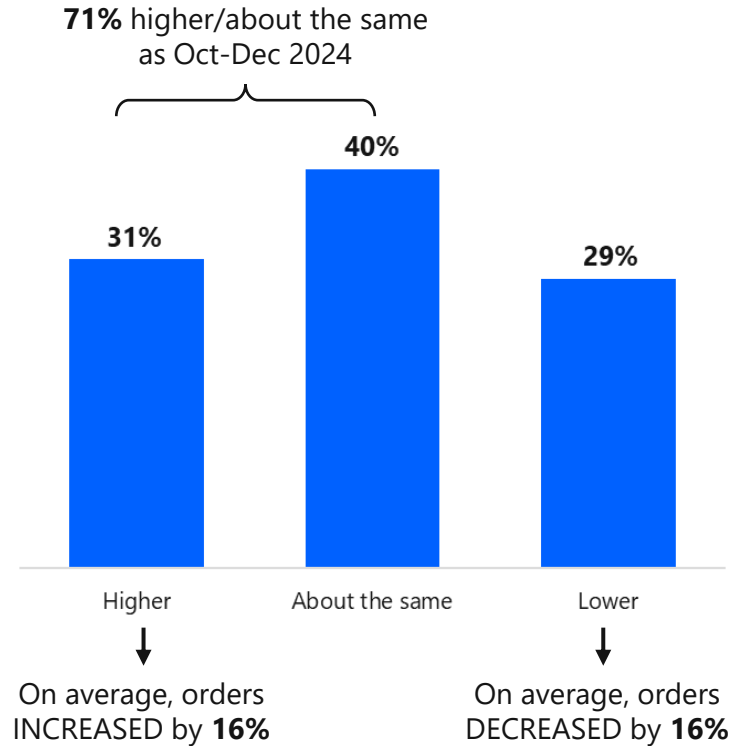
Key Findings

The findings explore the performance of members and confidence for the year ahead.



Over two-thirds experiencing similar or higher bookings compared to 2024

Comparing bookings/orders in months October, November and December 2025 **with the same period in 2024**



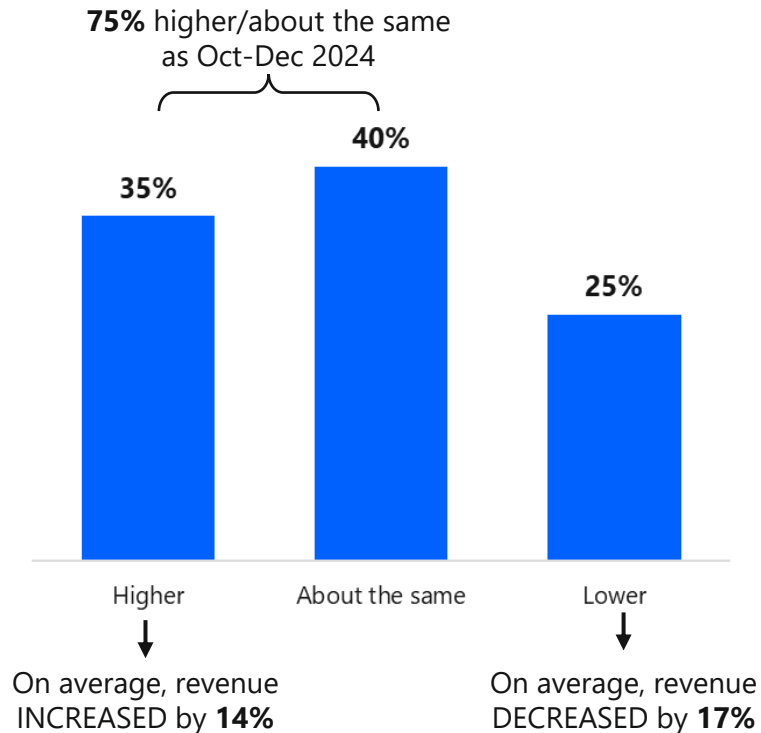
Service Providers were more likely than Tour Operators, DMCs & OTAs to state that bookings had remained at a similar level compared to 2024 (53% vs. 26%)



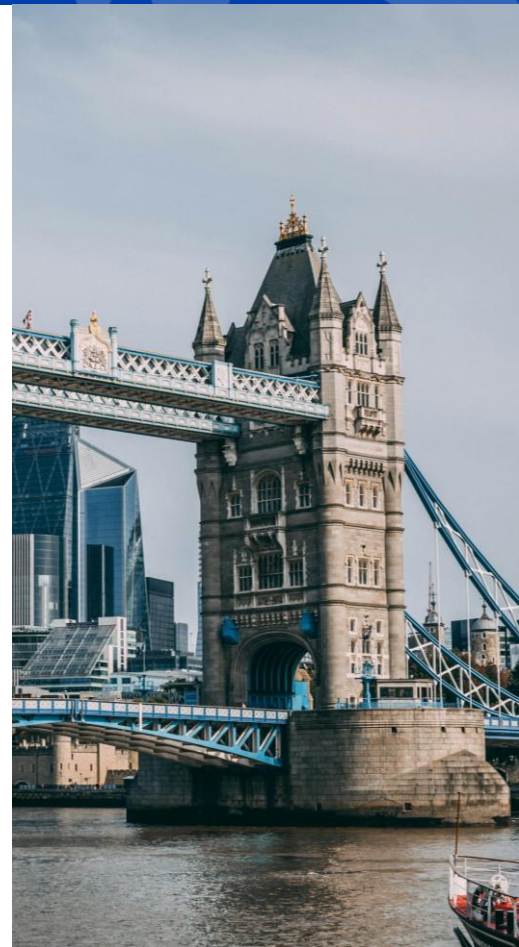
Q1. Considering bookings / visitor numbers / customer orders you have / expect to receive in October, November and December 2025, how do they compare to the same period in 2024? Base: 110

Three quarters expecting revenue to be the same or higher for Autumn 2025

Comparing predicted revenue yield in months October, November and December 2025 **with the same period in 2024**



Service Providers were more likely to have the same predicted revenue than Tour Operators, DMCs & OTAs
(59% vs. 28%)



Q2. Considering predicted revenue yield in October, November and December 2025, how does this compare to the same period in 2024? Base: 110

Members reported continued demand into the shoulder season...

“

"We have seen very good growth into core areas in Europe from Asia - such as CH, IT & UK"

Accommodation

"Seen an increase in interest for travel in November/December"

Tour Operators, DMCs & OTAs



"Short notice uptake from European source market city breaks and extended shoulder season from longer haul markets such as US"

Tour Operators, DMCs & OTAs

"Longer season it seems."

Service Provider

”

..but costs for visitors to the UK continue to rise and international uncertainty persists

“

"Shifts in customer behaviour, rising costs, and reduced purchasing activity among certain demographics suggest a decline in consumer confidence."

Transport & Aviation

"The UK market is not picking up at the same speed as it did a year ago."

Accommodation



"continuing the decline that has been 2025. Uncertainty in the world/cost of living/Trump!"

Tour Operators, DMCs & OTAs

"We feel that the drop is due to the continuing cost of living pressures, travel costs, global uncertainty and the implementation of the ESTA system."

Attractions & Experiences

”

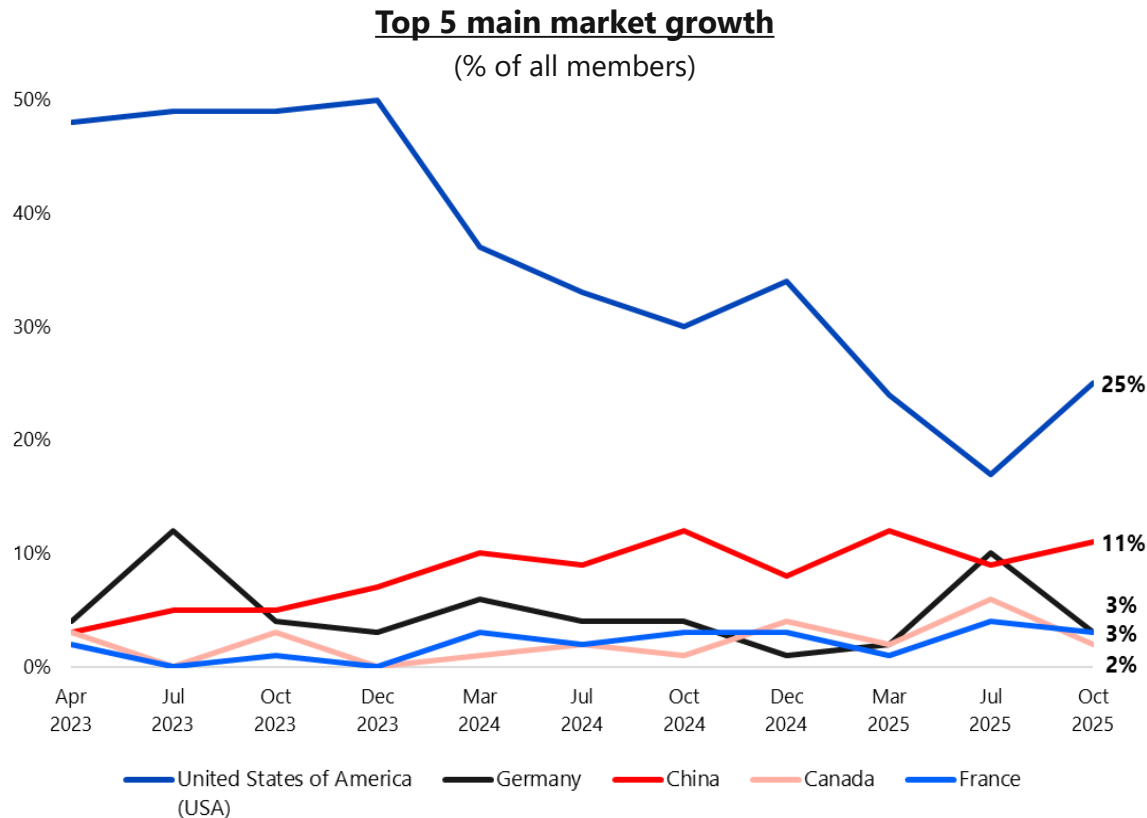
Main market growth increases for both the USA and China



45%

Not experiencing growth from **any** overseas markets

United States of America (USA)
Germany
China
Canada
France



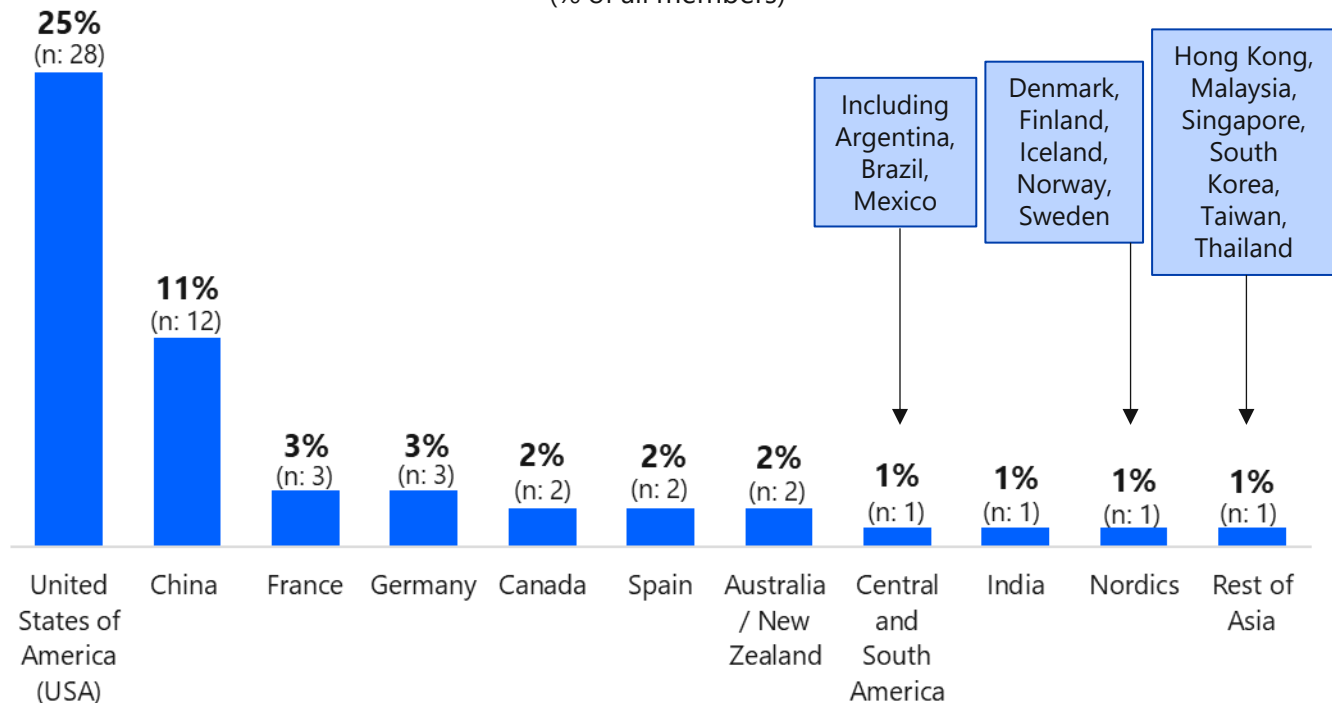
Q3. Please select **the main market** that you are currently experiencing growth in. Base: 110
NB: Base sizes per wave are included in the appendix

USA and China were most likely to be the main market growth

55% of respondents were experiencing growth from an overseas market. The market most likely to be mentioned was the United States of America (USA).

Main market growth

(% of all members)

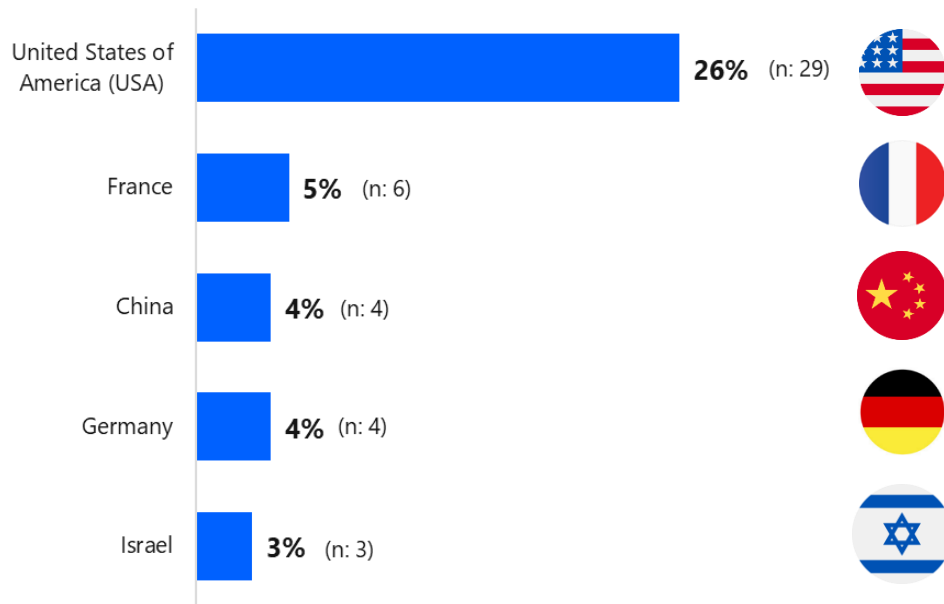


..but for over a quarter of members, the USA market was in decline

55% of respondents were experiencing a decline from an overseas market. The market most likely to be mentioned was the United States of America (USA).

Main market decline

(% of all members)

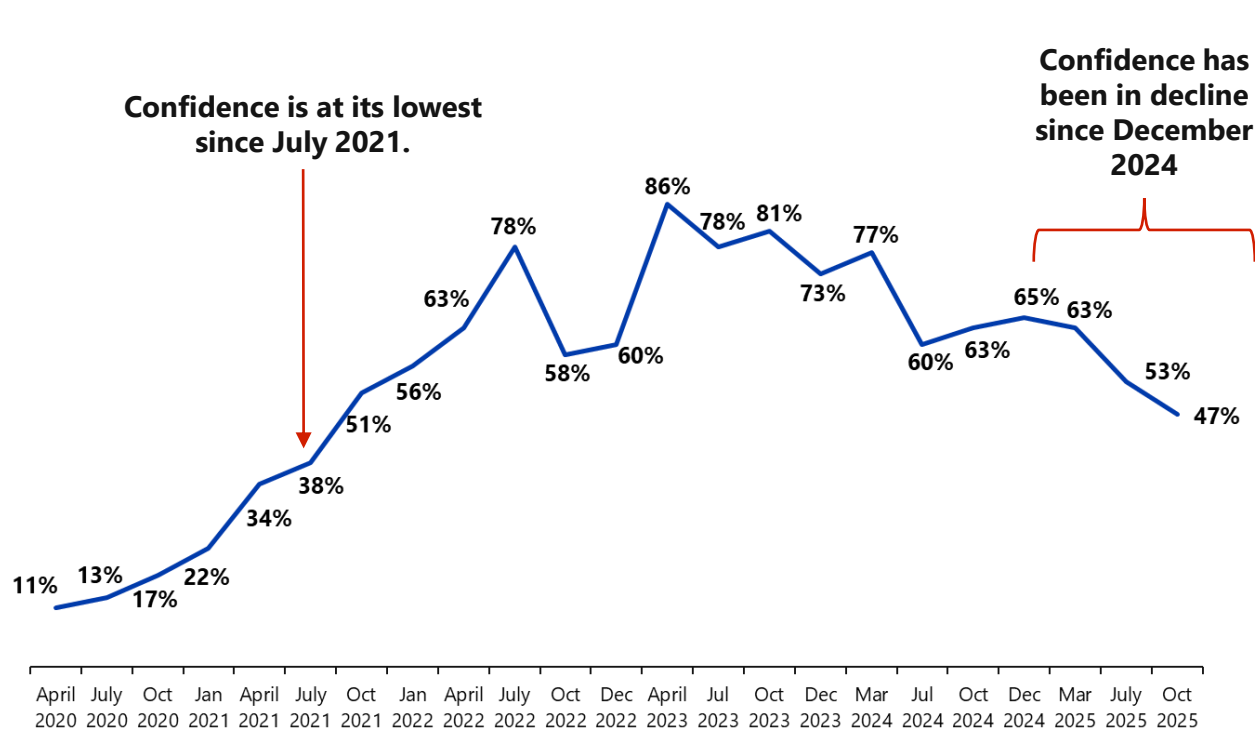


45%

are not experiencing decline from any overseas market



Confidence in bookings for the year ahead continue to fall



Transport & Aviation
were more likely to be
confident about the
year ahead than
Accommodation
(73% vs. 29%)

Confidence by membership categories

	Net: Confident	
	n	%
Accommodation	3	33%
Attractions & Experiences	6	29%
Destinations	3	43%
Service Providers	10	59%
Technology	1	50%
Transport & Aviation	8	73%
Tour Operators, DMCs & OTAs	21	49%

CAUTION: LOW BASE

Q5. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues / customer orders? Base: 110
Variable bases: Accommodation (9), Attractions & Experiences (21), Destinations (7), Service Providers (17), Technology (2), Transport & Aviation (11), Tour Operators, DMCs & OTAs (43)

Some anticipate an increase in group bookings for the year ahead...

“

“Increased interest in our sector.”

**Attractions &
Experiences**

“This would be mainly driven by the projected growth in our group booking sector, which is looking strong.”

**Tour Operators, DMCs &
OTAs**



“A lot more attractions opening.”

Service Providers

“I am finding that I am receiving more enquiries going forward for group visits.”

Attractions & Experiences

”

...but domestic policy changes and geopolitical events are creating uncertainty

“

“because of global events from wars to cost of leaving and markets lack of confidence.”

Attractions & Experiences

“We are anticipating that the government will be increasing VAT. We are already making arrangements based on that premise. The UK domestic leisure market is struggling.”

Accommodation



“The group market is suffering due to visa issues. So, maybe we will get an increase in bookings from Italy & Spain, but then the positive effects of this could be cancelled out by problems elsewhere, such as London..”

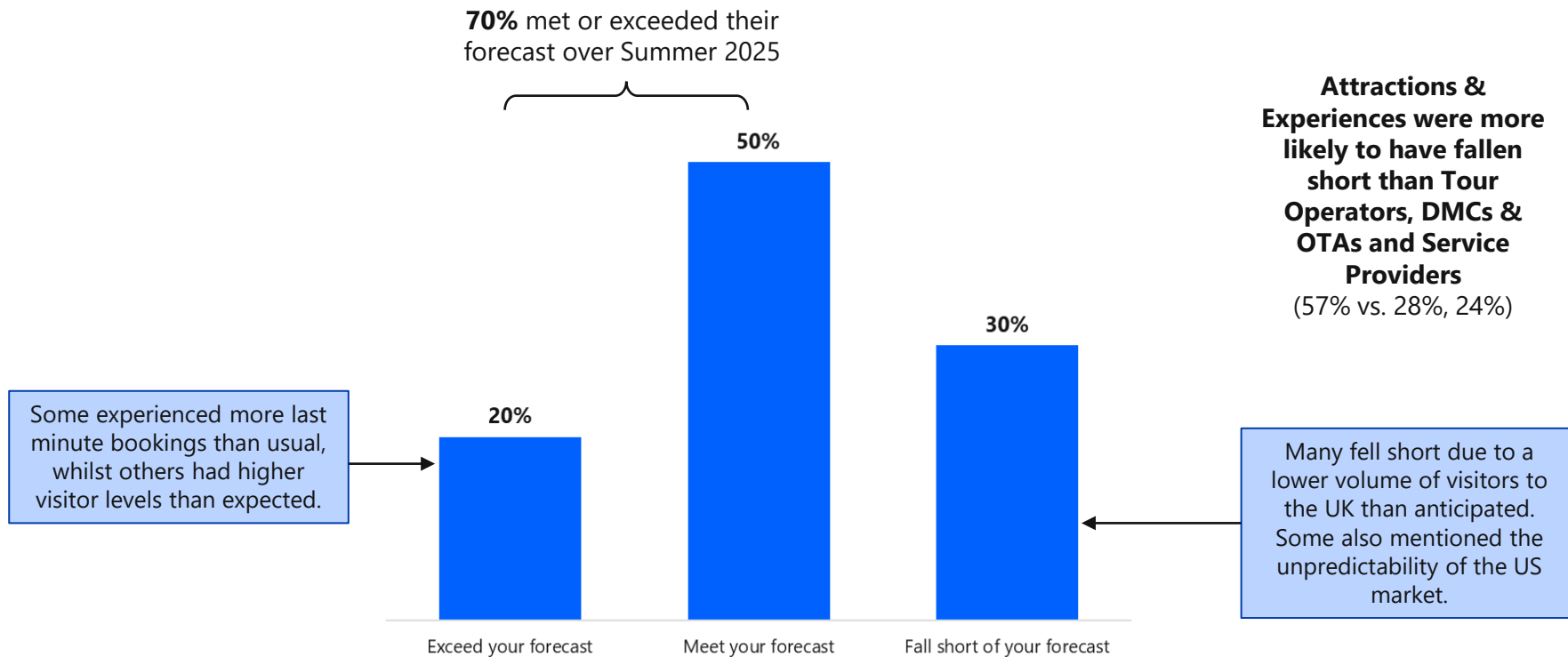
Service Providers

“Continued international disruption - Ukraine War, Gaza and US politics”

Tour Operators, DMCs & OTAs

”

Strong majority met or exceeded their forecast over Summer 2025



Q6. Considering your business' performance over summer 2025 (June, July and August), did you; exceed, meet or fall short of your forecast? Base: 110

Q6a. Why did you exceed your forecast? Base: 22

Q6a. Why did you fall short of your forecast? Base: 33

Strong majority met or exceeded their forecast over Summer 2025



Reasons for exceeding forecast

"We received a higher than normal level of last minute bookings."

Service Providers

"We had a very strong summer with visitor numbers up by over 11% year on year."

Attractions & Experiences



Reasons for falling short of forecast

"Footfall was significantly lower compared with the same period last year."

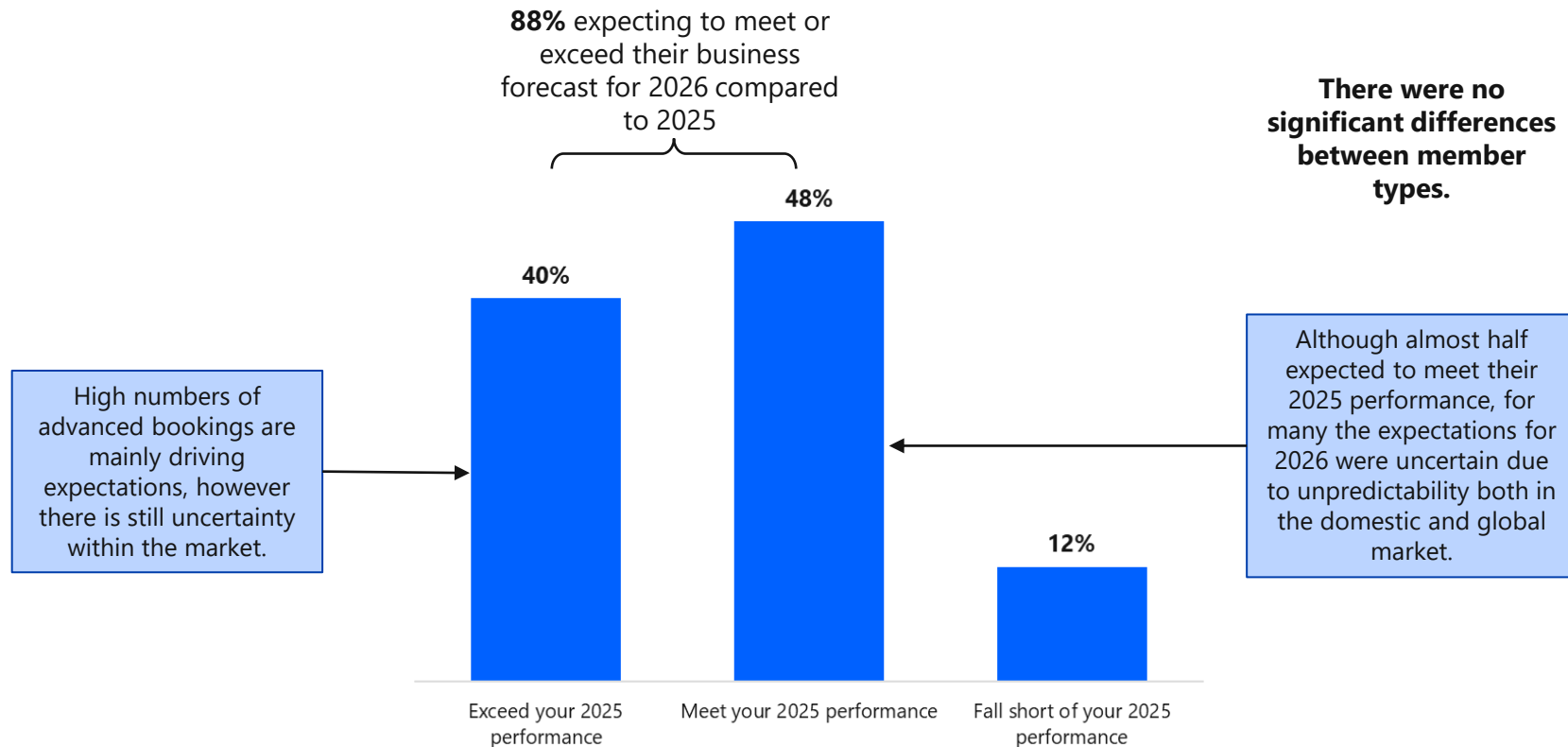
Attractions & Experiences

"US unpredictability. and whole world politics."

Tour Operators, DMCs & OTAs



Almost 9 in 10 expect to meet or exceed 2025 in their 2026 business forecast



Q7. Considering your business' forecast for 2026, do you expect to; exceed, meet or fall short of your 2025 performance? Base: 110

Q7a. Why do you expect to exceed your 2025 performance? Base: 44

Q7a. Why do you expect to meet your 2025 performance? Base: 53

Current trends and booking levels are promising but uncertain

“

Reasons for exceeding 2025 performance

“There are good signs from advanced bookings. However, they are concerned that civil issues are still veering from left to right; they are unpredictable.”

Service Providers

“Existing trends are slightly upwards and I have no reason to anticipate that this trend will significantly shift. However, this is a time of great uncertainty.”

Destinations



Reasons for meeting 2025 performance

“we are aiming for flat instead of usual growth and hope to stop the decline.”

Attractions & Experiences

“It is difficult to predict, as the world is a very strange place at the moment. We expect the drop in our prices to be offset by the slight increase in bookings.”

Transport & Aviation

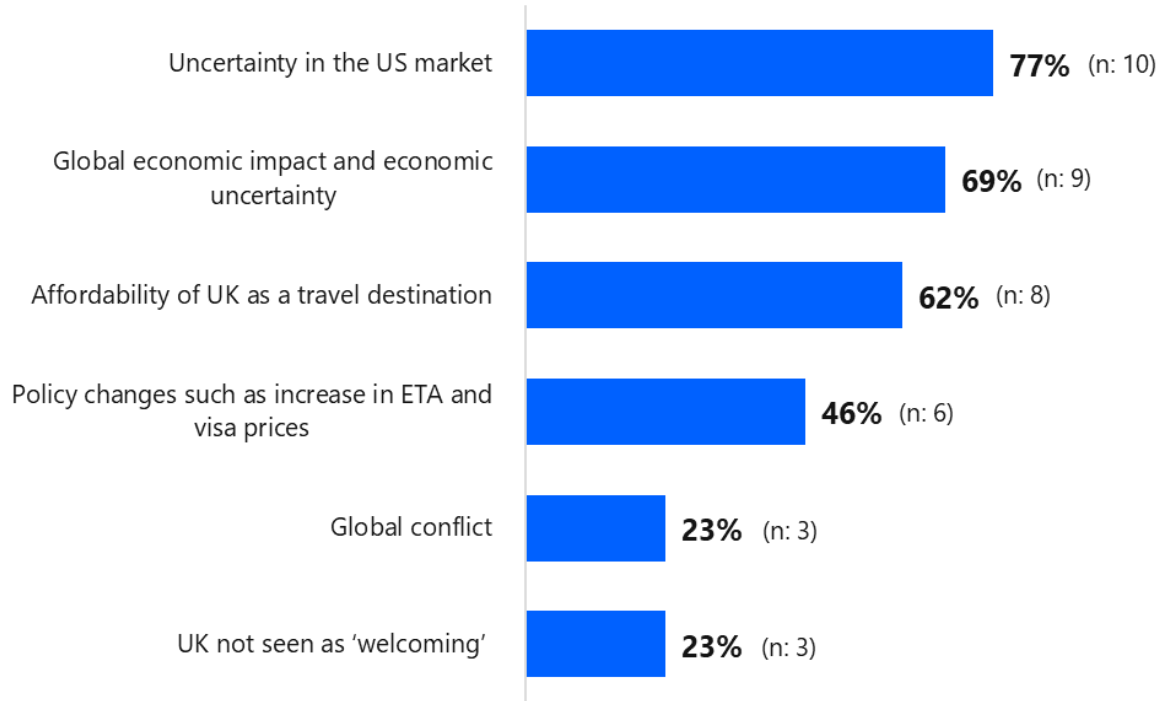
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Q7a. Why do you expect to exceed your 2025 performance? Base: 44

Q7a. Why do you expect to meet your 2025 performance? Base: 53

US market uncertainty and wider global economics are concerning for 2026

12% of members expect to fall short of their 2025 performance in their 2026 business forecast, with these responses across Attractions & Experiences, Service Providers and Tour Operators, DMCs & OTAs.



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Project code: TRISM04-9697

File name: BB_Report_Oct25_v2Ff

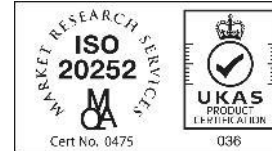
Date: 09/10/2025

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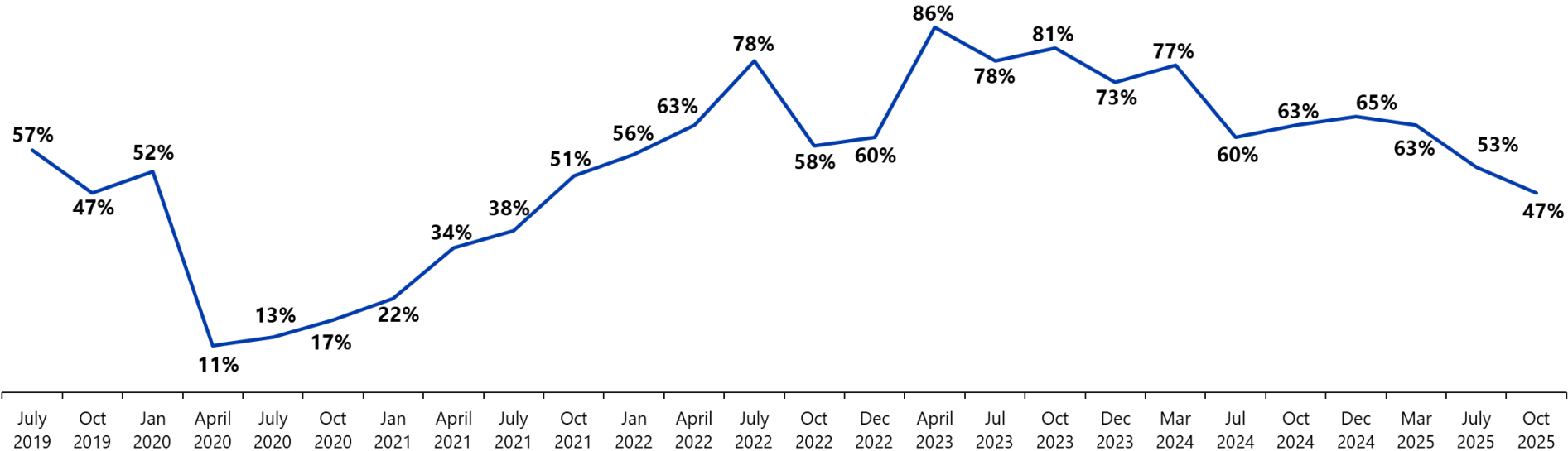


This research was carried out in compliance with
ISO 20252, (the International Standard for Market
& Social research), The Market Research Society's
Code of Conduct & UK Data Protection law.

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Appendix: Confidence levels over 6 years (Jul 2019-Oct 2025)



Q5. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues / customer orders? Base (for Oct 2025): 110

Appendix: Countries most frequently selected since March 2023

Countries	Mar-23		Jul-23		Oct-23		Dec-23		Mar-24		Jul-24		Sep-24		Dec-24		Mar-25		Jul-25		Oct-25	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%
United States of America (USA)	50	48%	42	49%	45	49%	43	50%	32	37%	31	33%	31	30%	37	34%	20	24%	19	17%	28	25%
Germany	4	4%	10	12%	4	4%	3	3%	5	6%	4	4%	4	4%	1	1%	2	2%	11	10%	3	3%
China	3	3%	4	5%	5	5%	6	7%	9	10%	9	9%	13	12%	9	8%	10	12%	10	9%	12	11%
Canada	3	3%	-	-	3	3%	-	-	1	1%	2	2%	1	1%	4	4%	2	2%	6	6%	2	2%
France	2	2%	-	-	1	1%	-	-	3	3%	2	2%	3	3%	3	3%	1	1%	4	4%	3	3%
Spain	3	3%	2	2%	-	-	2	2%	1	1%	3	3%	3	3%	2	2%	3	3%	3	3%	2	2%
Nordics	2	2%	2	2%	3	3%	1	1%	2	2%	1	1%	1	1%	2	2%	1	1%	3	3%	-	-
Australia	1	1%	-	-	2	2%	2	2%	3	3%	2	2%	3	3%	3	3%	1	1%	3	3%	2	2%
India	3	3%	2	2%	2	2%	2	2%	1	1%	4	4%	1	1%	3	3%	3	3%	2	2%	1	1%
Rest of Asia	4	4%	2	2%	1	1%	3	3%	2	2%	4	4%	3	3%	3	3%	1	1%	2	2%	1	1%
Base:	105		86		91		86		87		95		105		109		82		109		110	

* Blue highlighted boxes are the most frequent growing markets mentioned for the relevant wave