



## RESULTS OF ABTA UK TOURISM SURVEY 2004

ABTA UK Tourism Surveys were sent to the head offices of all ABTA Travel Agents. Out of the 1500 that were sent to members, 308 were completed and returned – a response rate of 21%.

The questions are listed below along with the results.

### 1. In which ABTA region/s does your business operate?

REGION	Respondents by region
Eastern	27
Greater London	55
Midlands	36
North Eastern	8
North Western	44
Northern Ireland	17
Scotland	28
South Wales	4
South Western	26
Southern	44
Yorkshire & North Midlands	29
All Regions	11

(Please note that many respondents have offices in more than one region).

### 2. What percentage of your turnover is for UK holidays or leisure travel?

Nothing	1%
1-5%	39%
6-10%	20%
11-20%	16%
Above 20%	14%

Only 1% of respondents had no turnover based on UK holidays, down 6% from 2003. The number of respondents in the 1-5% category was up 2% from 2003. However, the 6-10% category was down 4% from 2003. Respondents in the above 20% category dropped 2% from 2003.

### 3. What percentage of your turnover is for UK business travel bookings?

Nothing	29%
1-5%	37%
6-10%	12%
11-20%	7%
Above 20%	10%

In general, business travel bookings were down slightly compared to 2003. Respondents in the 1-5% category were down 8%. Those in the 11-20% category reported a decrease of 2%, as did those in the above 20% category. However, respondents in the 6-10% category reported a slight increase of 1%.

**4. Do you have a dedicated member of staff (or department) responsible for dealing with the UK market?**

Yes	6%
No	94%

The number of respondents with a dedicated member of staff responsible for dealing the UK market was up 2% from 2003.

**5. If not, is your staff generally experienced/trained to sell UK Holidays?**

Yes	79%
No	21%

These figures showed no change from 2003.

**6. What, if any, kind of activity do you currently undertake to market the sale of UK holidays to your clients?**

Advertising	25%
Brochures	49%
Newsletters	18%
Radio	0.6%
Email	7%
Direct Mail	13%
In house promotions	10%
Window display	41%
Telephone	4%
Promotion via website	9%
Other (please explain)	2%

Out of the 2% in the "other" category, the majority of respondents used faxing to market UK holidays.

**7. Do you plan to take proactive measures to increase your sales of UK holidays to your clients?**

Yes	47%
No	53%

The number of respondents planning to take proactive measures to increase UK holiday sales has fallen by 7% compared to the 2003 survey.

**8. If you answered yes to the above question, would you be focusing on:**

Holidays only	54%
Business travel only	2%
Both	44%

**9. Can you say if demand for UK and the domestic products sold through your agency is:**

Increasing	27%
Decreasing	13%
Staying the same	41%
Don't know/no comment	11%

The percentage of respondents reporting an increase in demand for domestic products has decreased by 9% from 2003 while the percentage reporting that demand is decreasing has increased by 1% since 2003.

**10. Can you briefly explain why?**

The majority of the respondents said that demand was staying the same. Those reporting a decline in UK sales through their agency cited direct selling by tour operators as the reason. Others felt that the rise of low cost carriers meant that European holidays provided better value to customers than UK holidays. They also said that many consumers were unaware that they could book their UK holiday through their local travel agent.

27% reported an increase in demand for UK holidays. These respondents felt that this was a result of consistently good summer weather in the UK and an improvement in the quality and availability of product being offered. Many also cited safety as a factor as many of their customers felt safer staying in the UK.

**11. Which type of UK PACKAGE holidays generate the most business for you?**

Short Breaks (city breaks)	51%
Short Breaks (country/seaside)	15%
Coaching Holidays	44%
Self-catering cottages/boating holidays	13%
Holiday Parks	10%
Special interest	4%
Business travel	13%

**(respondents answered more than once)**

Compared to 2003 the respondents reported a significant increase in the number of city breaks sold (up 19%). Sales of most other UK package holidays were also up compared to 2003. Country/seaside breaks were up 6%, Coaching up 14%, self-catering cottages/boating were up 5% and holiday parks were up 7%.

**12. Which type of UK TAILOR-MADE holidays generate the most business for you?**

Short Breaks (city breaks)	52%
Short Breaks (country/seaside)	12%
Motoring Holidays	3%
Self-catering cottages/boating holidays	9%
Holiday Parks	9%
Special interest	5%
Business travel	13%

**(respondents answered more than once)**

Short breaks continued to dominate both the UK package holiday and tailor-made holiday market. Tailor-made short breaks had increased by 10% compared to 2003. Tailor made country/seaside breaks were up 3% compared to 2003. Tailor made business travel was also up 5%.

### 13. Most popular Tour operators.

While most agents offer a range of UK operators Superbreak was, once again, the most popular operator amongst respondents. Highlife was the second most popular UK operator, followed closely by Hoseasons. Shearings and Wallace Arnold were the fourth and fifth most popular UK operators amongst respondents.

### 14. What sources do you use for making UK hotel bookings?

Viewdata	52%
Other Hotel Guides	10%
CRS	18%
Travel TradeX on ABTAnet	2%
Telephone	15%
Other Internet based sources	43%
Other (please explain)	4%

(respondents answered more than one question)

Compared to the 2003 survey, the percentage of those reporting Viewdata as a source of making UK hotel bookings has risen 7%. The number of respondents booking by telephone had decreased by 11%. Booking via the internet had was up 23% compared to 2003.

### 15. Are you aware of the British Travel Agents' Accommodation Register?

Yes	69%
No	31%

There has been a decrease (7%) in awareness of the Accommodation Register.

### 16. If you are aware of the Register, how often do you use it?

Practically every day	0.5%
At least every week	3%
At least once a month	17%
Less frequently	56%
Never	23%

### 17. How useful is the information in the Register?

Very useful	9%
Quite useful	63%
Not very useful	28%

**18. Have you ever experienced problems receiving commission from UK hotels?**

Yes	42%
No	58%

42% of respondents said that they had experienced problems receiving commission from UK hotels. This was up 17% compared to 2003.

**19. Are you aware of the “Britain Resorts 2004” brochure aimed at improving agents’ knowledge of UK Resorts?**

Yes	42%
No	58%

Awareness of the British Resorts brochure was up slightly (5%) from 2003.

**20. How useful is the information in the brochure?**

Very useful	16%
Quite useful	68%
Not very useful	16%

**21. Do you send your staff on UK educational?**

Yes	36%
No	64%

**22. Do you think the VisitBritain’s domestic marketing campaigns have been successful?**

Yes	29%
No	70%