HOLIDAY TRENDS

2019

Contents

Introduction

Welcome to Holiday Trends 2019 – our predictive annual report on the intentions, motivations and attitudes of the British holidaymaker. This year we look at the overall trends for UK and overseas tourism, with a focus on areas such as sustainable tourism, accessible tourism and Brexit.

This year's survey was conducted with Brexit fast approaching and a record British summer still fresh in Britons' minds. Perhaps as a result of these factors, predicted UK holidays are at their highest in recent years. Elsewhere, anticipated overseas holidays have marginally increased, and trips to Western Europe and the Mediterranean are set to be higher than in any of the last five years.

Elsewhere in the report, we see that Britons are better at recycling at home than abroad, and that more can be done to meet the needs of holidaymakers with disabilities or special needs.

We hope you find this report interesting and engaging. If you'd like to learn more about the data, please do get in touch!

Jon Young
Research Director

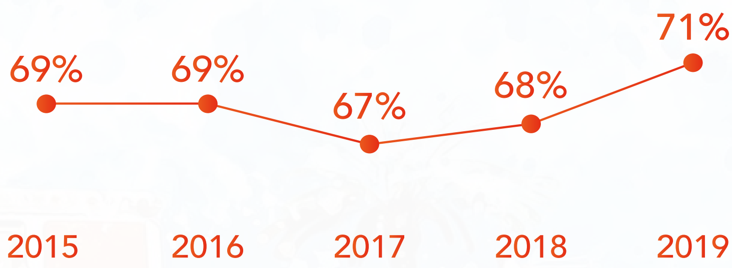
Linda Haden
Research Manager

Overseas Holidays

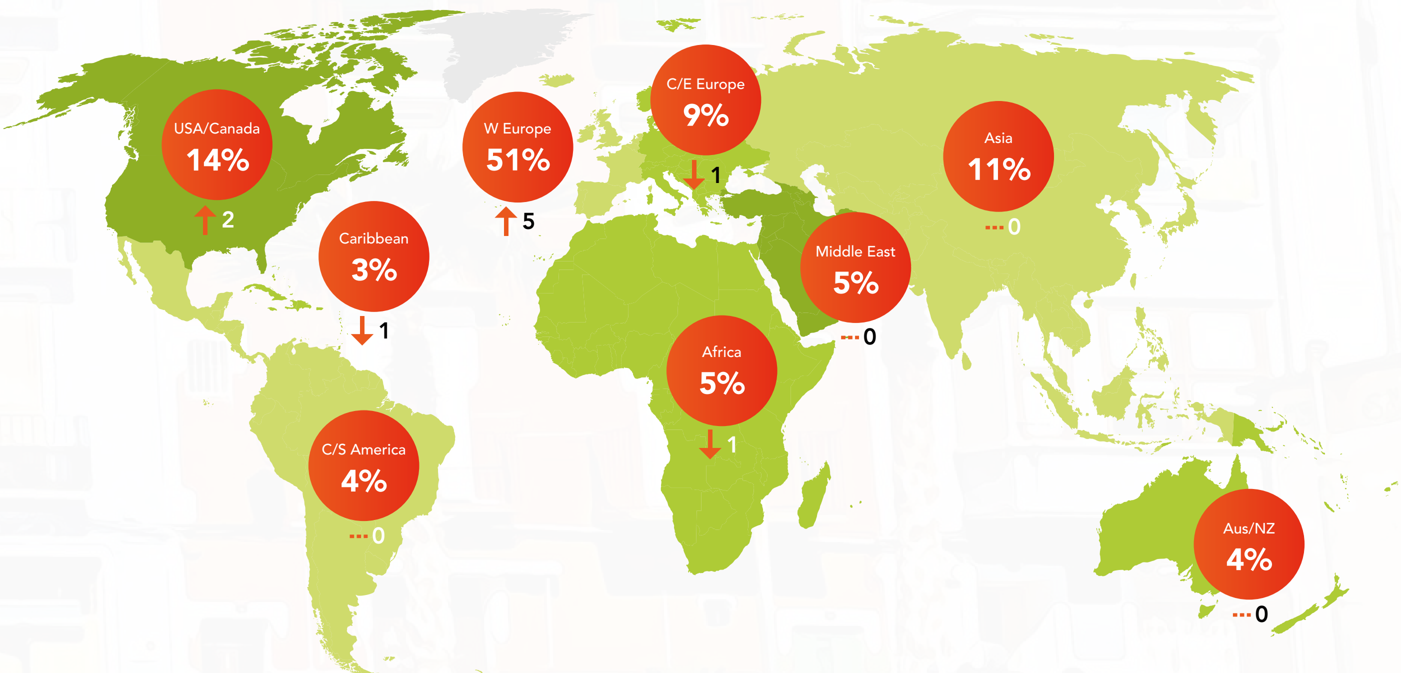
Overseas holidays are set to rise, driven by trips to Western Europe and the Mediterranean

Since we started Holiday Trends in 2007, we've seen holiday behaviour impacted by the financial crash, terrorism and extreme weather. These factors continue to play at least some role in Britons' holiday choices, and in 2019 we can confidently add Brexit to the mix too. With all these external factors, it's surprising that Britons are still taking overseas trips in large numbers – and our findings suggest more will take an overseas holiday in 2019 than in the last five years.

71% of Britons expect to take an overseas holiday in 2019, with 53% looking at a short-break and 66% expecting a holiday of four nights or more.



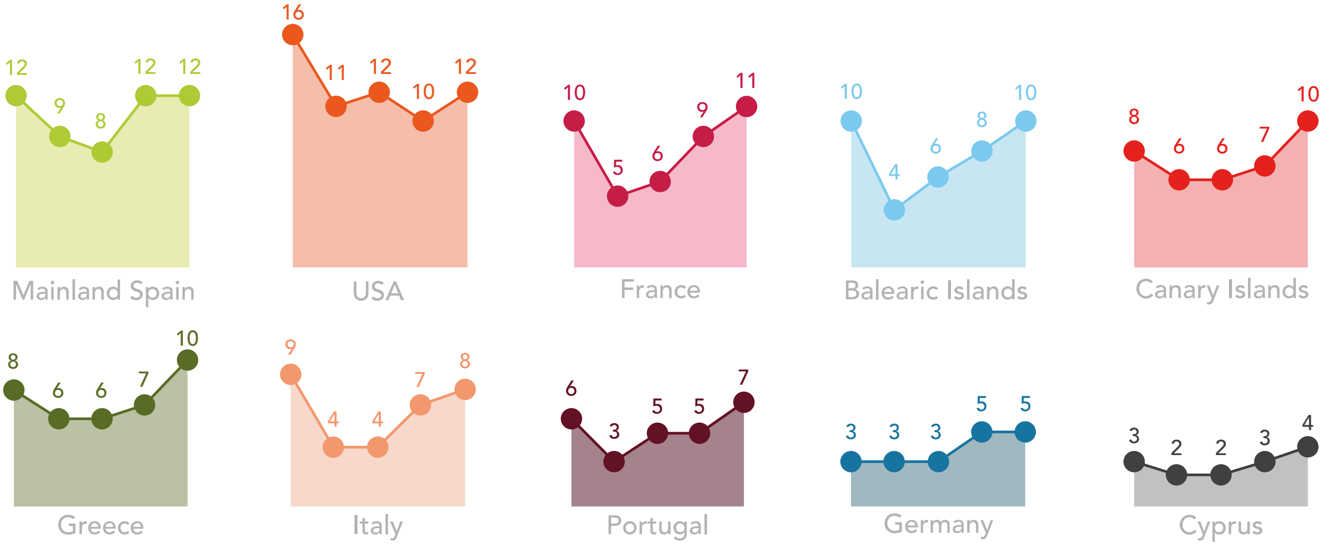
Proportion of Britons Planning to Take an Overseas Holiday (%)



World region visitors are seriously considering visiting in 2019 (% and percentage point change from 2018)

However, the higher proportion of Britons leaving UK shores doesn't point towards a more adventurous traveller. Western Europe and the Mediterranean are set to be the biggest beneficiaries of this rise; 51% are anticipating a longer holiday there compared to 46% in 2018 and 38% in 2017. Trips to North America are also set to increase, although the rise from 12% to 14% is only marginal. Elsewhere in the world, visits look fairly consistent with previous years.

Holiday Intentions (Main Holiday 2015 - 2019) %



For the second year in a row, mainland Spain is set to be the most popular destination – although this year that accolade is shared with a resurgent USA. France's recovery from its dramatic drop in visits in 2016 is now complete, with 11% intending to visit in 2019 – an even higher proportion than in 2015. The Canary Islands, Balearic Islands, Greece, Portugal and Cyprus are also set to welcome more British visitors.

Top oversea holiday motivations

1. Weather
2. Price of the holiday
3. Safety
4. Scenery & Landscape
5. Friendly people
6. History & Culture
7. Beaches
8. Food & drink
9. Authentic Local Experiences
10. Good deal

Despite global trends and new holidaying fashions like dark tourism and Instagram tourism, Holiday Trends demonstrates year-on-year that the leading drivers for taking an overseas holiday remain the same overall – good weather, value for money, safety, natural beauty and friendly people. Of course, these motivations can differ depending on a range of factors, including destination-type, life-stage and time of year. The latest trends and fashions also have an impact, but our research suggests these are often niche and their influence overestimated. For a mainstream audience, promoting holidays with the following factors is likely to appeal:

Although our overseas picture for 2019 is positive, there are a number of caveats. Our research is predictive rather than actual - over a half of those intending on taking a holiday overseas have yet to book their trip. From previous years, we know that around a quarter of those intending to take an overseas holiday do not end up having one. Furthermore, data from the regional hoteliers' association, Hosbec, indicates 15% fewer bookings were made to Benidorm in January 2019 than in 2018. Combined with our findings, this suggests that despite positive intentions, some Britons may be awaiting the outcome of Brexit before booking their trip. This hypothesis ties in with a spike in Brexit-related travel concerns compared to the last two years (see our Brexit section).

That all said, we are confident that Britons are resilient when it comes to holiday-taking. Last year's research demonstrated that the vast majority would make concessions elsewhere in their lives before giving up their annual trip abroad.

We measure holiday incidence to over 100 countries in our research, and work with tour operators and visit boards across the world. If you'd like to discuss a particular destination, do get in touch.

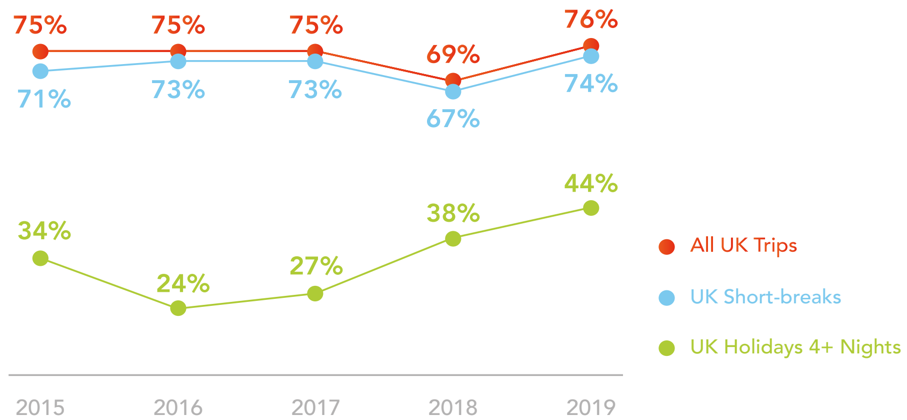
UK Holidays

Domestic holidays of 4+ nights in the UK are on the rise – the British seaside is the biggest beneficiary

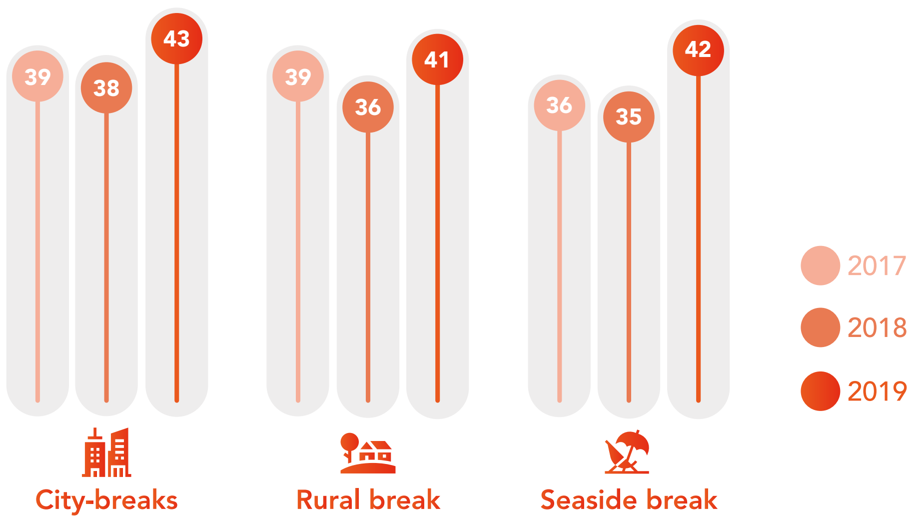
The conditions for Britons taking a domestic holiday are the best they have been for a number of years. The strength of the pound means that trips abroad have become more expensive, whilst Brexit uncertainty leaves a number of unanswered questions (see our Brexit section). In addition, the summer heatwave in 2018 has made the UK a real option for sun-worshippers who usually get their Vitamin D abroad.

Our research suggests that these conditions have had an impact. 76% of Britons expect to take a holiday in the UK in 2019, seven percentage points higher than in 2018 – although returning to levels reported in 2017. More significantly, 44% of Britons are planning a holiday of 4+ nights in the UK - a proportion that has increased significantly for three consecutive years.

Anticipated UK Holiday (%)



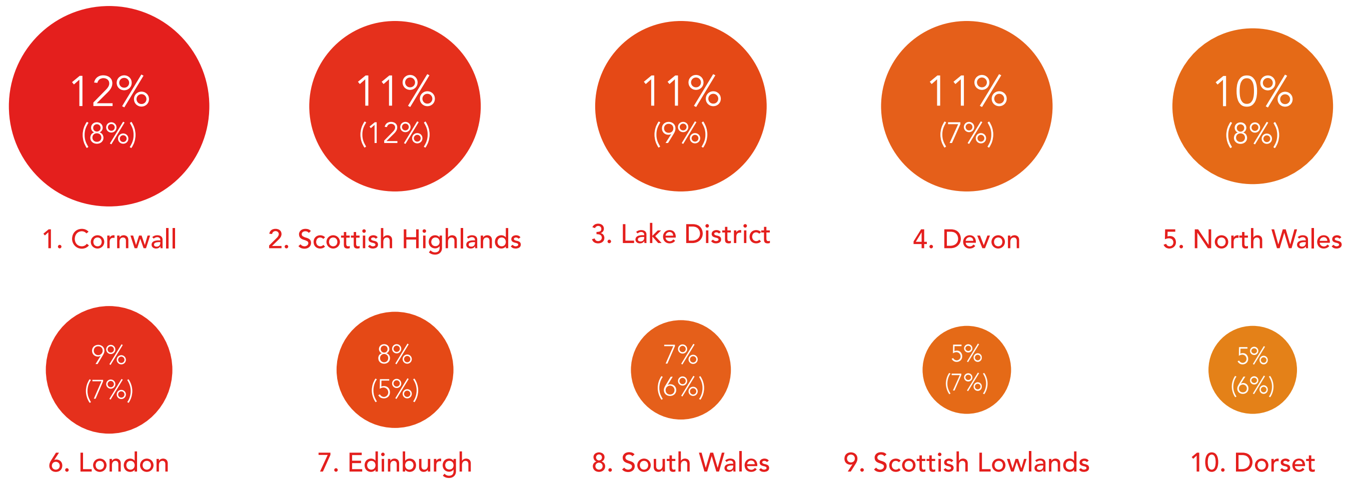
Coastal, rural and urban destinations are all likely to welcome more domestic holidaymakers in 2019. The top five UK destinations overall include lakes, mountains, the seaside and the city, with at least one representative from England, Scotland and Wales.



Type of Anticipated UK Holiday

Coastal destinations are set to benefit the most from the rise in longer holidays, underlining the impact of the 2018 heatwave in influencing choice. The rise in UK coastal holidays will be most apparent in Cornwall, Devon and South Wales, with Cornwall the number one destination overall.

Top destinations for a UK holiday in 2019 (% all Britons)



Although traditional seaside resorts and small seaside towns remain the most popular seaside destinations, there has been a significant increase in interest in non-urban coastal destinations too. The increase in the latter is positive news for resorts already straining from overtourism in the summer months.

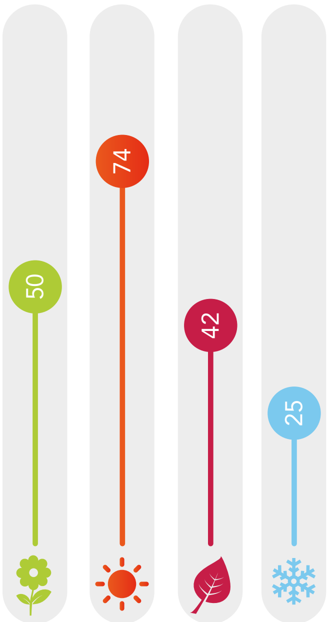
	2017	2018	2019
Traditional resorts	13%	20%	26%
Harbour towns	12%	10%	14%
Small seaside towns	18%	17%	21%
Non-urban coastal destinations	9%	6%	17%

Chart showing coast holiday preference and direction of travel

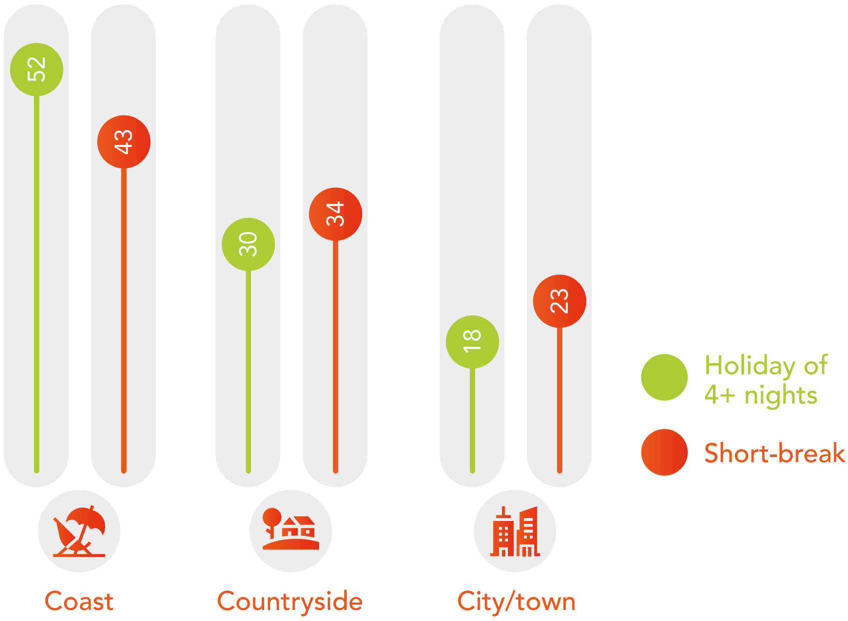
The UK coast offers a range of activities. Food and drink, walking/hiking, history and culture, beaches, and nature and wildlife make up the top five. There is also interest in visiting the coast for festivals and events and for health and wellness.

Top 7 activities britons would like to experience on the english coast (%)

For those interested in taking a wellness holiday, the coast was regarded as preferable to either the countryside or the city. Wellness also offers an opportunity for off-peak tourism to the coast; one in four Britons with an interest in this type of holiday said they would be interested in visiting in Winter, two in five in Autumn and half in Spring.



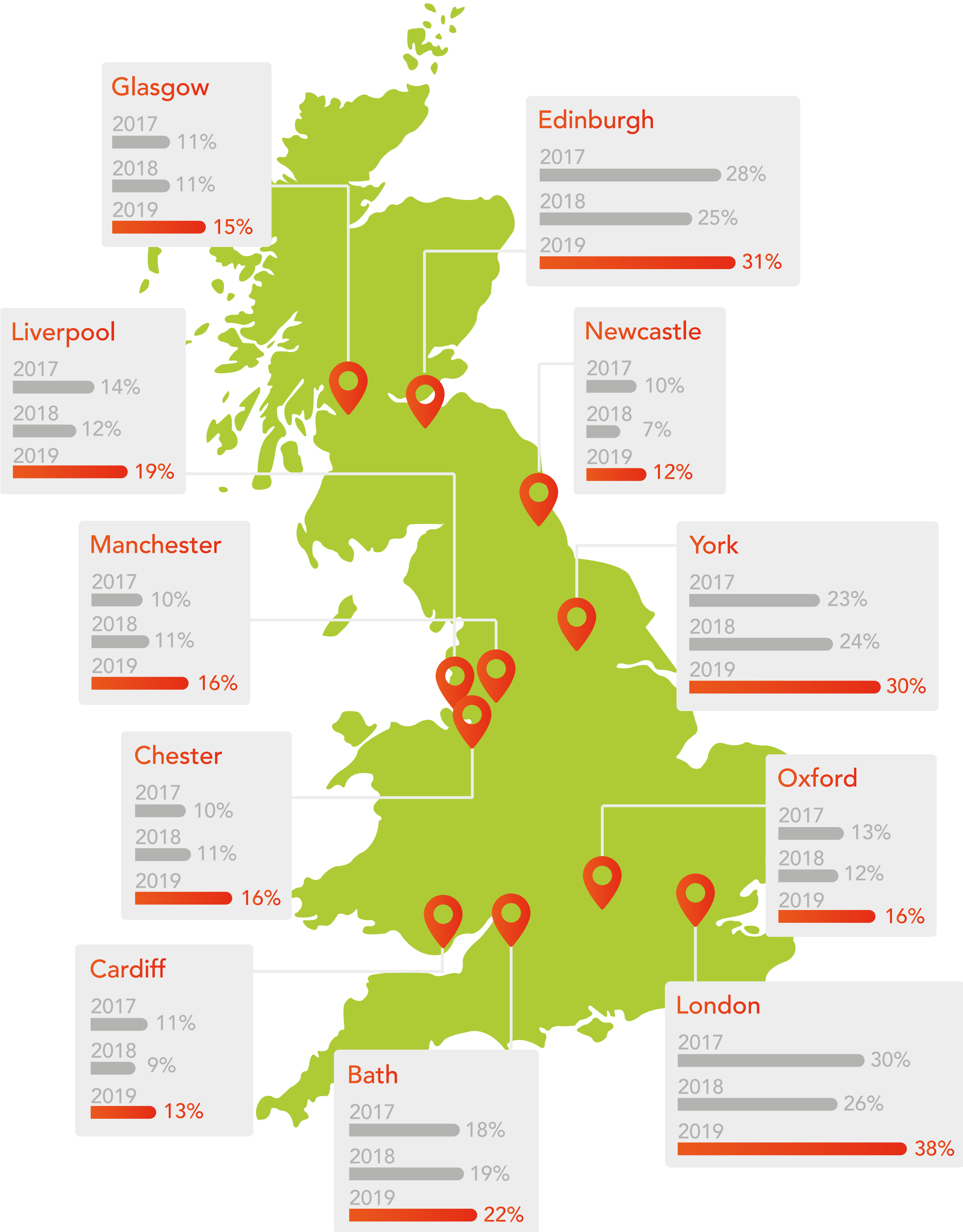
Seasons Britons would like to conduct a wellness activity at the coast (%)



Preferred destination type for a wellness holiday (%)

Our full dataset has detail on a range of UK destinations by sub-groups, holiday type and hospitality type. We work regularly with VisitEngland, VisitScotland, the NCTA and other UK holiday providers. Do get in touch if you'd like to hear our thoughts.

City break destination in next 2 years



More than two in five visitors plan to take a UK city break in 2019 – a 5 percentage point increase on 2018. London and Edinburgh are the top two city break destinations, both more popular than in 2018. York is also set to welcome a higher proportion of British visitors.

Brexit

Brexit concerns are on the rise but don't appear to be impacting holiday choices yet

Since Britain voted to leave the EU in 2016, the tourism industry has been vocal in expressing its concerns – from grounded planes to staff shortages to employee laws. Economists have also warned of the potential negative impact of Brexit – no deal or otherwise – on the UK economy.

Despite these worries, the British people have appeared relatively sanguine about how their holidays may be affected. As reported in the Overseas Holidays chapter, intentions to holiday overseas have marginally increased in the last two years, with EU countries like France and Spain the biggest beneficiaries. Our data also shows that concerns over how the economy will affect holiday plans haven't changed at all in the last three years.

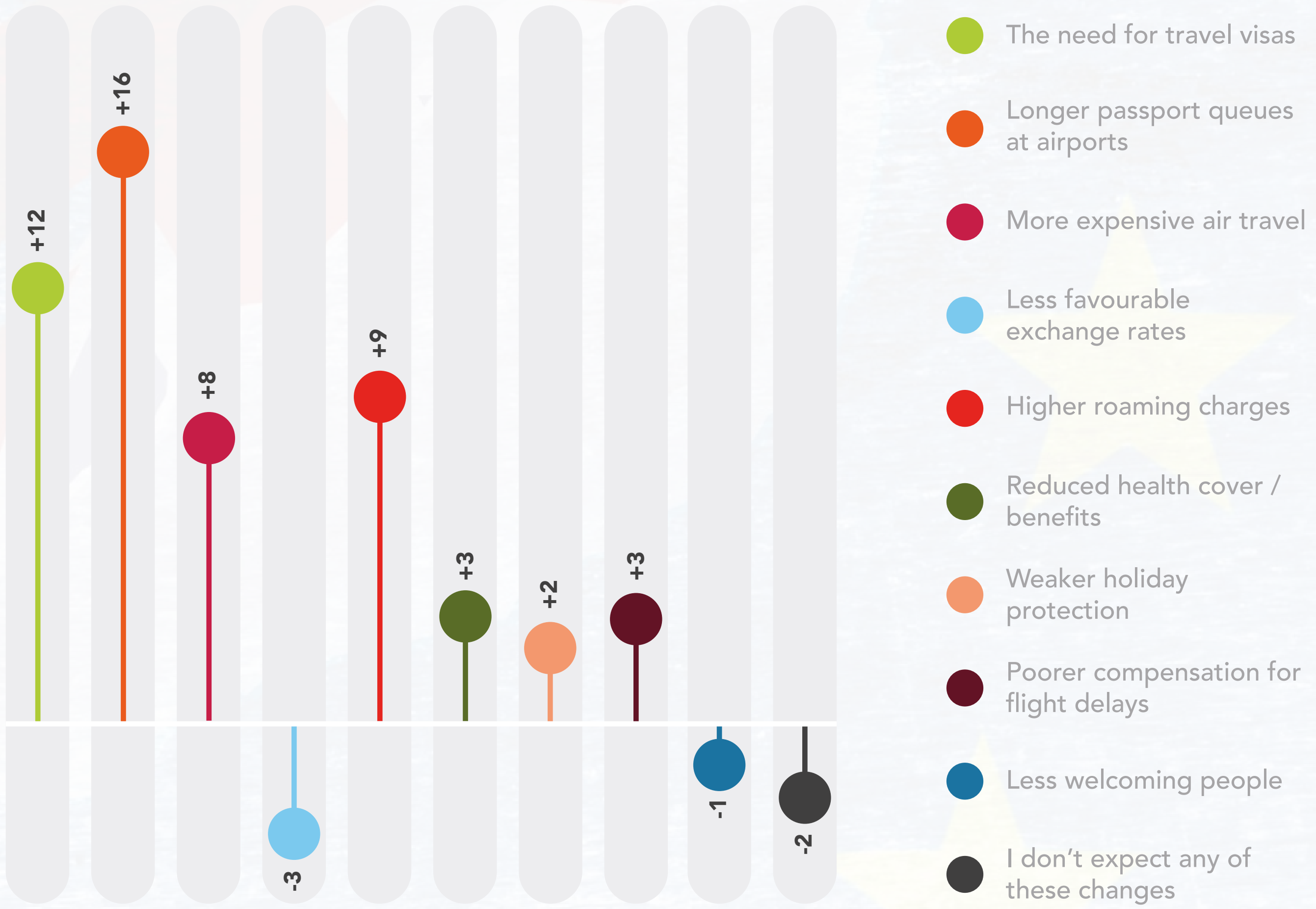
Concern about the economy and its impact on holiday taking behaviour in next 12 months (%)

Britons' apparent indifference may be driven by a number of factors. First, we should note the importance that experiential-minded Britons attach to their holidays. Our research shows that when impacted by a major life event or financial commitment, 90% of Britons would rather adapt their holiday plans than have no holiday at all. The increase in trips to Europe, at the expense of long-haul destinations, may be indicative of adaptive travel. Secondly, the large number of Britons that voted for Brexit are unlikely to buy fully into negative predictions in the first place.

It's also important to reiterate that our survey only shows intentions, with only half of those intending an overseas trip having already booked it. The rise in predicted UK holidays and overseas holidays may indicate Britons keeping their options open. Finally, it's worth remembering our predictions lack a 'counter-factual' – in other words, holiday intentions had Brexit not happened. Perhaps overseas trips would have been even higher in this alternate reality.

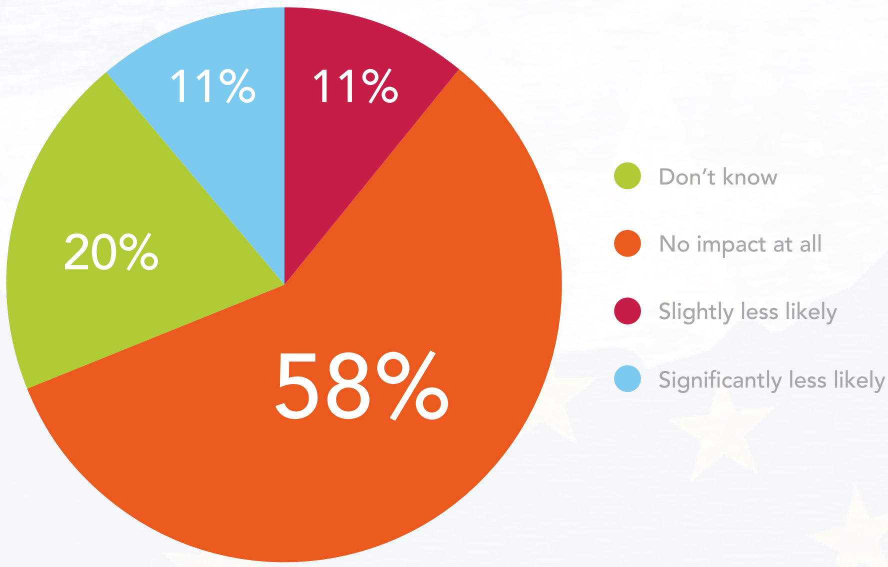
That said, despite the minimal impact Brexit appears to have had on British holidaymakers' overall intentions, concerns around the tangible impacts have risen significantly since 2018 (see next page). Nearly half believe Brexit will create a need for travel visas, and similar proportions believe it will drive longer queues at airports and more expensive air travel. Higher roaming charges are also expected by around a third. One in ten stated that the €8 visa charge would make them significantly less likely to travel to the EU on a holiday.

Whilst these concerns don't appear to have impacted overall holiday desires, their sharp increase compared to 2018 and 2017 suggests that the potential is there. For undecided Britons with several destinations on their shortlist, the thought of longer queues at airports or higher roaming charges may be enough to make them opt for a non-EU destination.



Perceptions of how Brexit will impact holidays to EU countries (%)

Perceptions of how €8 visa charge will impact holidays to the EU (%)



There may, though, be a higher number of people holidaying in the UK in 2019, in the hope that last year's hot summer will be repeated.

In the early part of 2019, many travel companies have reported bookings slower than normal. In addition, there was a lot of advertising at the turn of the year, so the cost of acquiring each booking was high. This adds up to quite a tough period.

Jeremy Skidmore, **Travel Journalist**

But companies are confident that bookings will pick up when the political situation is resolved and that 2019 will be fine. We have pretty much full employment and people in jobs tend to take holidays.

We have been monitoring Brexit's effect on travel concerns and global perceptions of the UK. You can find our suite of blogs and videos covering this topic on our website.

Sustainable Tourism

Britons are far more likely to pursue sustainable practices at home than on holiday

World tourism has grown every year since 2010, and this trend is set to continue in the foreseeable future. With global warming becoming an even more urgent concern and honeypot destinations bursting at the seams, the sustainable tourism debate isn't going to go away. In this chapter, we try to understand how much sustainable tourism matters to the general public, and what – if anything – can be done differently.

In line with findings from previous years, this year's data demonstrates that sustainable tourism is not yet a major holiday choice driver. When asked to indicate the important influences on destination choice, 'sustainable standards' was ranked 26th out of 29, ahead of only 'a special occasion', 'ancestry' and 'a particular restaurant'. There is some difference by holiday type – on wellness retreats sustainable standards are 11th most important and 20th most important for luxury holidays – but generally it is not yet front of mind for the majority.

That is not to say that British holidaymakers do not care about sustainable standards at destinations. In the 2018 survey, 80% of Britons stated they would proactively help to deliver sustainability standards at a destination and 61% that they would pay an extra fee to do so.

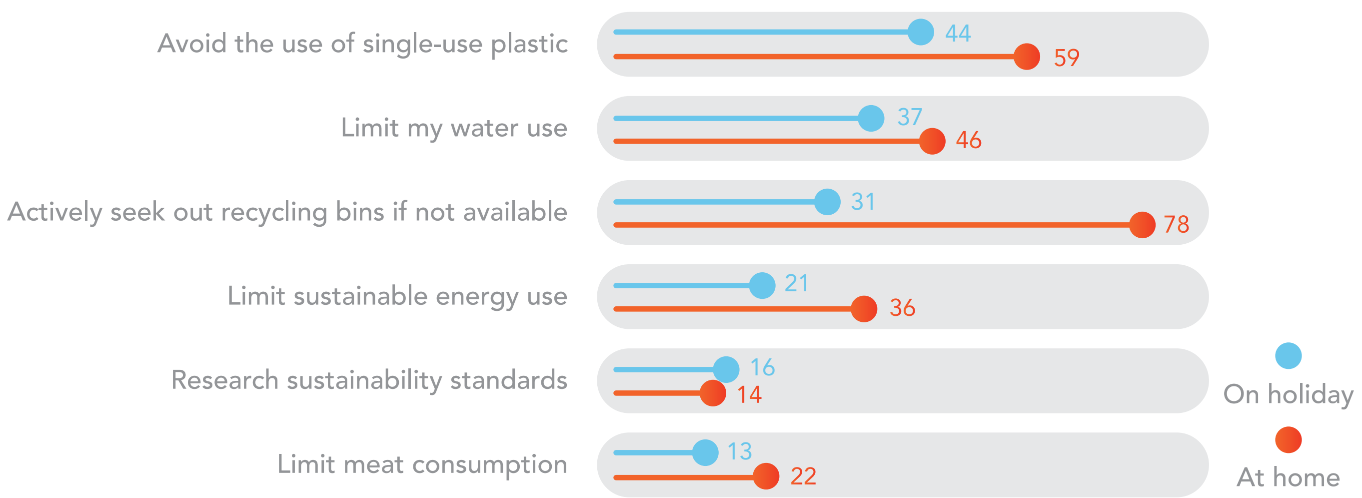
But despite these good intentions, three in ten Britons do not intend to engage in any sustainable activities whilst on their holiday next holiday. Perhaps more interesting is the significant gap between the sustainable activities Britons do on their holiday and those they conduct at home. For example, 59% of Britons avoid the use of single-use plastic at home, but less than 44% intend to do so on holiday. A stark 78% actively seek out recycling bins if they are not available at home, but only 31% would do so on their holiday. There are similar disparities for energy use and meat consumption.

77% would like to know more about sustainable tourism standards

80% would proactively help to deliver sustainability standards at a destination

61% would pay an extra fee to ensure sustainable tourism standards are met

Sustainable activities conducted on holiday and at home (%)



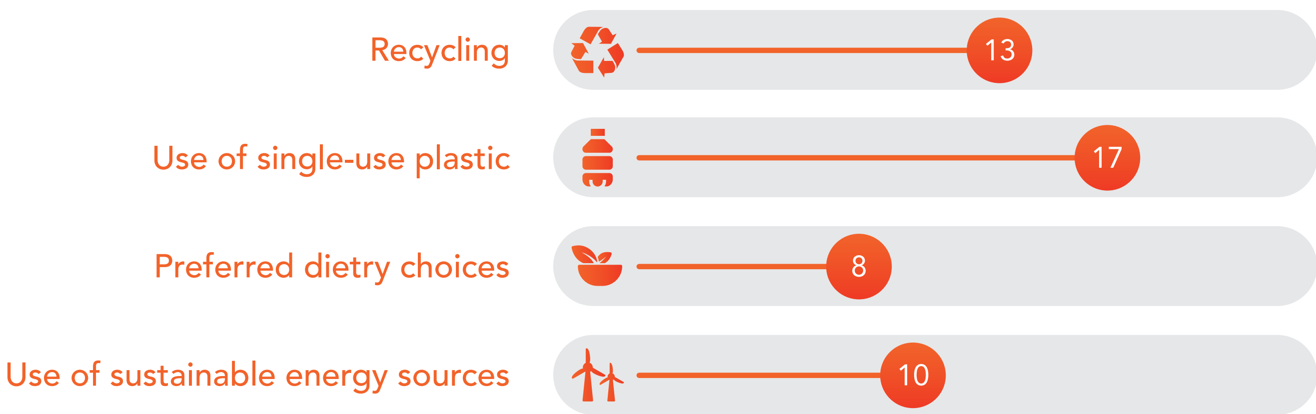
The reasons for these gaps in activity are likely to be complex, and go beyond the remit of this report. However, our findings do hint at some drivers. Sustainable practices tend to be driven by social expectations and norms (e.g. recycling) and embedded routines and habits (e.g. weekly pick-ups or conveniently placed bins). By their very nature, they demand people think beyond themselves and instead about the world they live in. Holidays, on the other hand, represent an escape from social norms and a break from routine. They are self-driven activities, with motivations such as enrichment, indulgence, recuperation or family bonding (to name a few) taking centre stage. It's likely therefore that for that week of the year, the fate of the planet slips down Britons' priority list.

Our data suggests some ways to close these gaps. For one, it's possible to target the 'self-driven' desires of visitors. For example, 'scenery and landscape' and 'beaches' represent the 3rd and 10th most important choice drivers for a holiday. By highlighting the extent to which their activity threatens these, holidaymakers may feel sufficiently threatened to act. Similarly, 'friendly people' is the 9th most important driver – highlighting the tangible impact of unsustainable practices on residents' lives may also have an impact.

A more effective intervention may simply be to improve the ease of undertaking these activities whilst on their trip. When asked how easy or difficult it was to meet their preferred standards on their most recent holiday, 20% stated it was difficult to meet their single-use plastic standards, and 14% their recycling standards. This clearly highlights an audience that would immediately improve these behaviours should the opportunities be facilitated. Others are likely to follow suit.

> Consumers like sustainability to be easy and obvious, preferably a black and white issue. But sustainability is much more complex.
>
> For travel and tourism, sustainability is even more complex. It's not one thing, but an intangible concept made up of a lot of factors - food, service, accommodation building, furnishings, tours, activities, water, waste, energy, supply chains, employment, training...
>
> It's a lot of issues for a consumer to be aware of, let alone understand what is sustainable and what is not. There is no one simple 'good', because sustainability is a balance and full of trade-offs. So whilst consumers like the idea of sustainable tourism, they are not yet able to really discern it.

Vicky Smith
Earth Changers

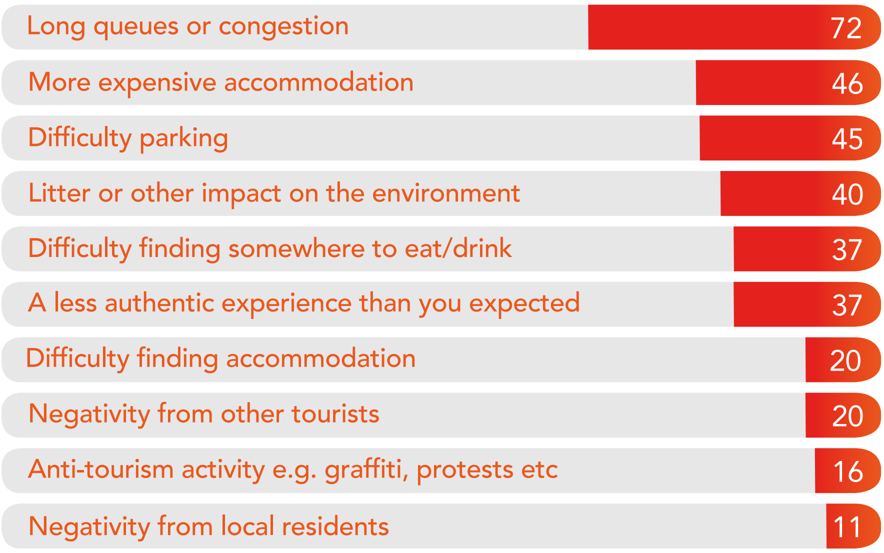


Proportion regarding sustainable activities as difficult on last main holiday (%)

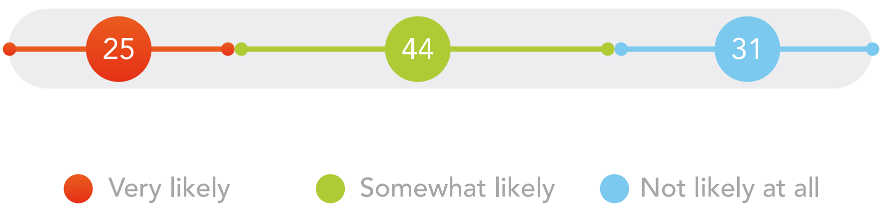
Overtourism

A quarter of Britons who took a holiday in 2018 stated they experienced overtourism on the trip. Of those that experienced overtourism, longer queues, more expensive accommodation, difficulty parking and impact on the environment were the main outcomes. Difficulty finding places to eat or drink and finding accommodation were also mentioned.

Impact of overtourism on those that experience it (%)



A typically touted solution to overtourism is to charge visitors a tourism tax – at the time of writing, Edinburgh was the latest city to apply this. We asked visitors how likely they would be to have visited their 2018 main holiday destination in 2018 if they were charged an extra £20 per person with all funds raised going to local businesses. Positively, the majority stated they would either have been very likely or somewhat likely to have visited with this charge. This suggests that these charges are likely to raise funds and reduce visit numbers. The pricing level would of course be decided on a range of factors, and would be likely to be lower than £20 per person.

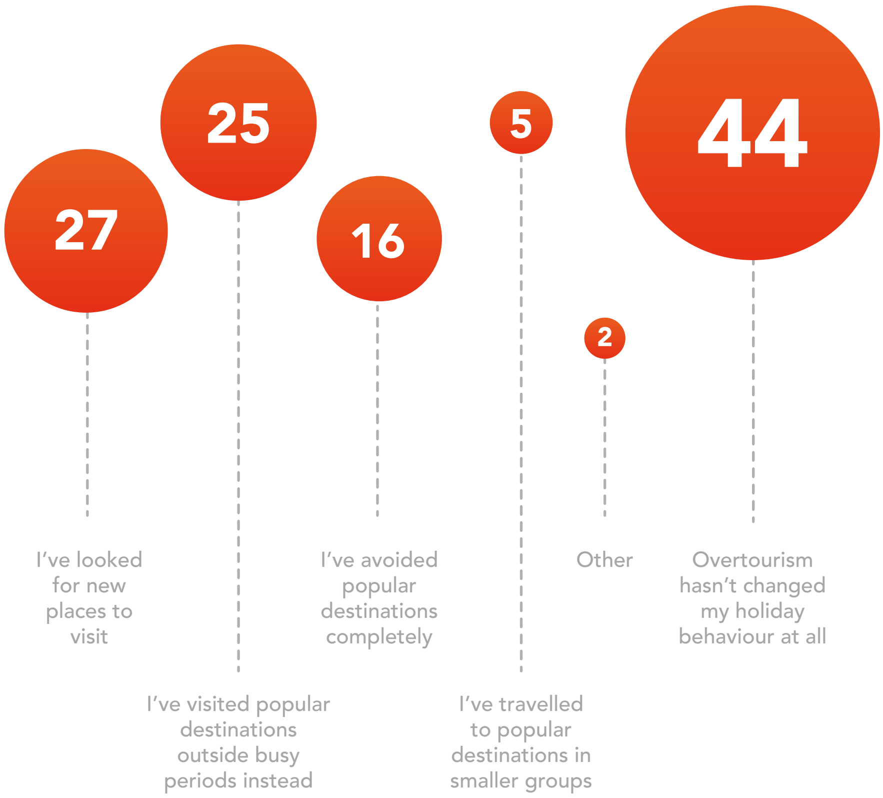


Likelihood to have taken most recent holiday if charged an extra £20 per person (%)

Of course, it may not be necessary to charge, and there is a possibility that tourists will be self-regulating. 27% of British holidaymakers stated that overtourism has encouraged them to look for new places to visit instead, and 25% stated that they have chosen to visit popular places outside peak season. 16% stated they have avoided popular destinations completely. This does highlight the potential for honeypot destinations to divert visitors to less busy periods or to promote nearby destinations instead.

> I think it's only a question of time before overtourism destinations stop targeting pure tourism numbers but switch to being targeted on value to the destination and more qualitative information such as visitor experience. These measures will change the face of tourism. It's a question of market readjustment.
>
> Ultimately, responsible tourism is to create 'better places for people to live in and for people to visit'. Overtourism is going in the other direction and consumers are becoming more aware of the actual value of their experience.

Vicky Smith
Earth Changers



Impact of overtourism on holiday choices (%)

To read more about sustainable tourism and access our presentations on the subject, visit www.bva-bdrc.com

Accessible Tourism

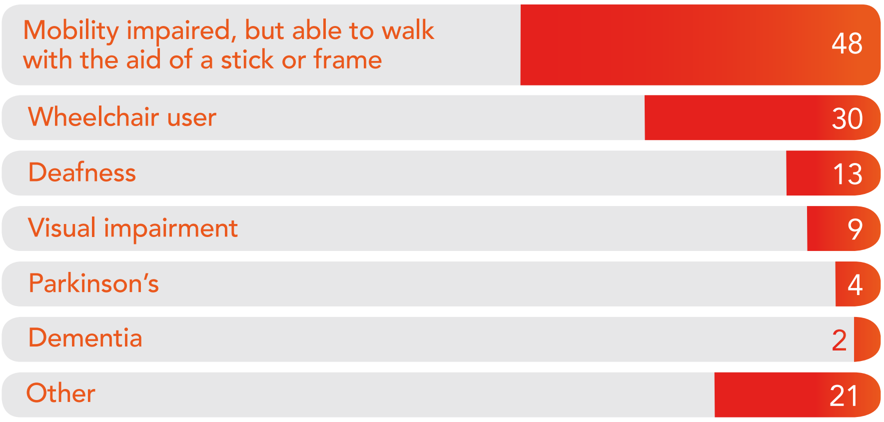
More needs to be done to meet the needs of holiday-makers with a disability or special needs

The UK population is ageing, with the ONS predicting that by 2040 one in seven of the population will be aged 75 or over. An ageing population brings with it numerous challenges, not least in terms of accessibility. In this chapter, we take a look at the size of the accessible tourism market, some of the immediate implications and how well it is currently served.

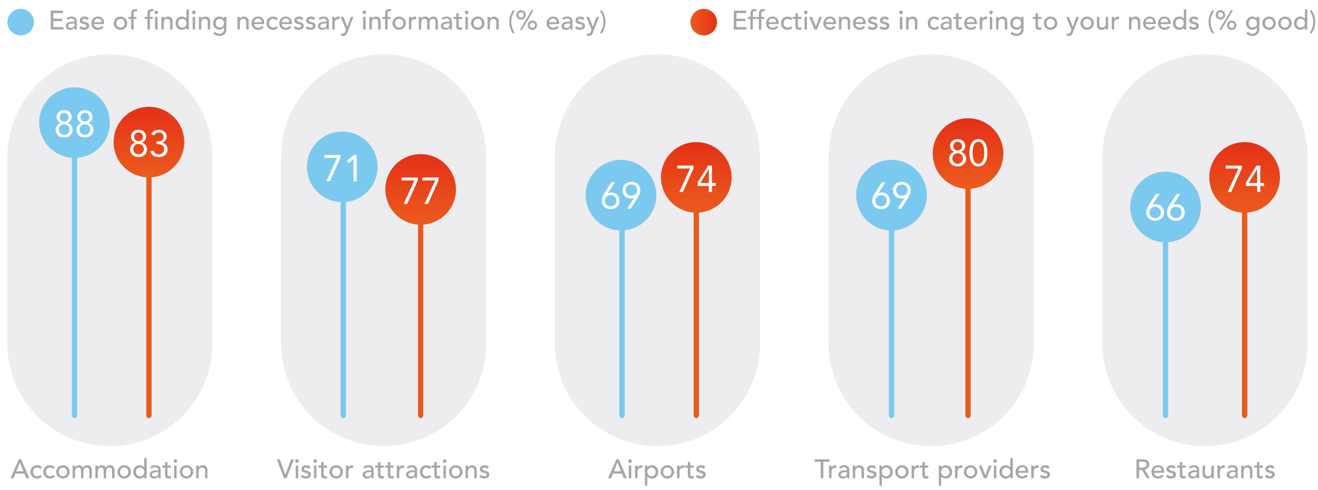
One in six of the UK population have taken a holiday where a member of their immediate party had a disability or special need in the previous two years. Of these, mobility impairment was cited most often, followed by wheelchair use, deafness, and visual impairment.

Our survey asked these respondents how easy or difficult it had been to find out information at a number of staging points on a recent holiday. Accommodation providers were regarded the most favourably for providing information, and were rated significantly higher than other staging points. Accommodation providers were also rated the highest rated in terms of catering to the needs of party members with a disability or special needs, although the gap with others – particularly transport providers – is much smaller. The relatively low ratings for information provision compared to those for the actual experiences of visitor attractions, airports, transport providers and restaurants suggests a need to improve the information available about accessibility.

Types of disability or special needs for holiday makers (%)

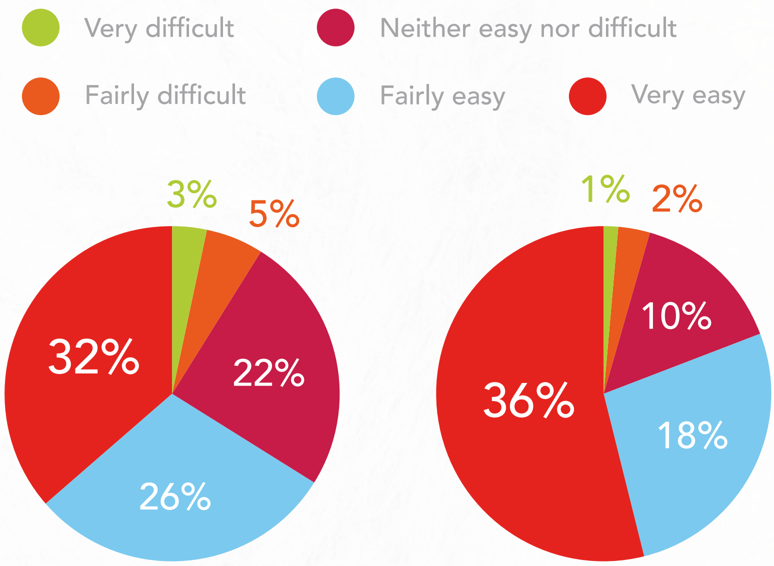


Delivery at each holiday stage



Difficulties gaining information for those with a disability or special need are compounded by other challenges. Just 32% of those who sought travel insurance in this audience found it very easy to do so, compared to 35% of all British holidaymakers. Trips were also significantly less likely to be independently booked than on an average holiday (37% compared to 57%).

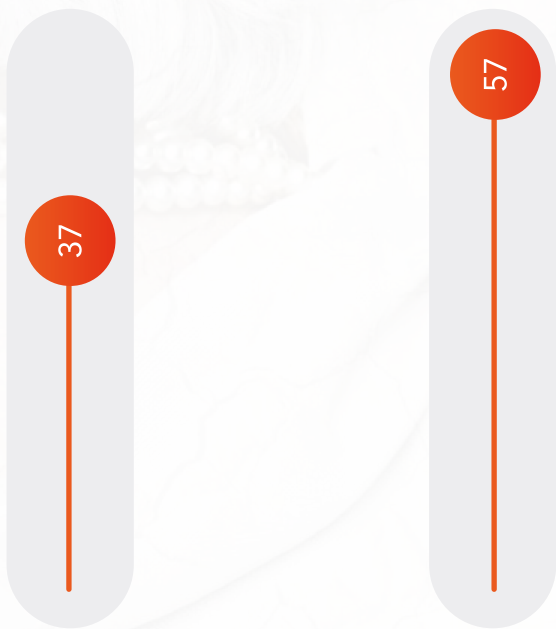
Ease of finding travel insurance



Holiday accompanied by someone with a disability or special need

Average holiday taken by Britons

Proportion booked holiday independently (not as part of a package) %



Holiday accompanied by someone with a disability or special need

Average holiday taken by Britons

These challenges may be influencing holiday choice. 39% stated they were more likely to holiday in the UK when a party member had a disability or special need, and 29% of this audience had been prevented from taking a holiday at all due to their disability or special need.

39%

more likely to holiday in the UK than normal when travelling with someone with a disability or special

29%

had been prevented from taking a holiday to the disability or special need of party members

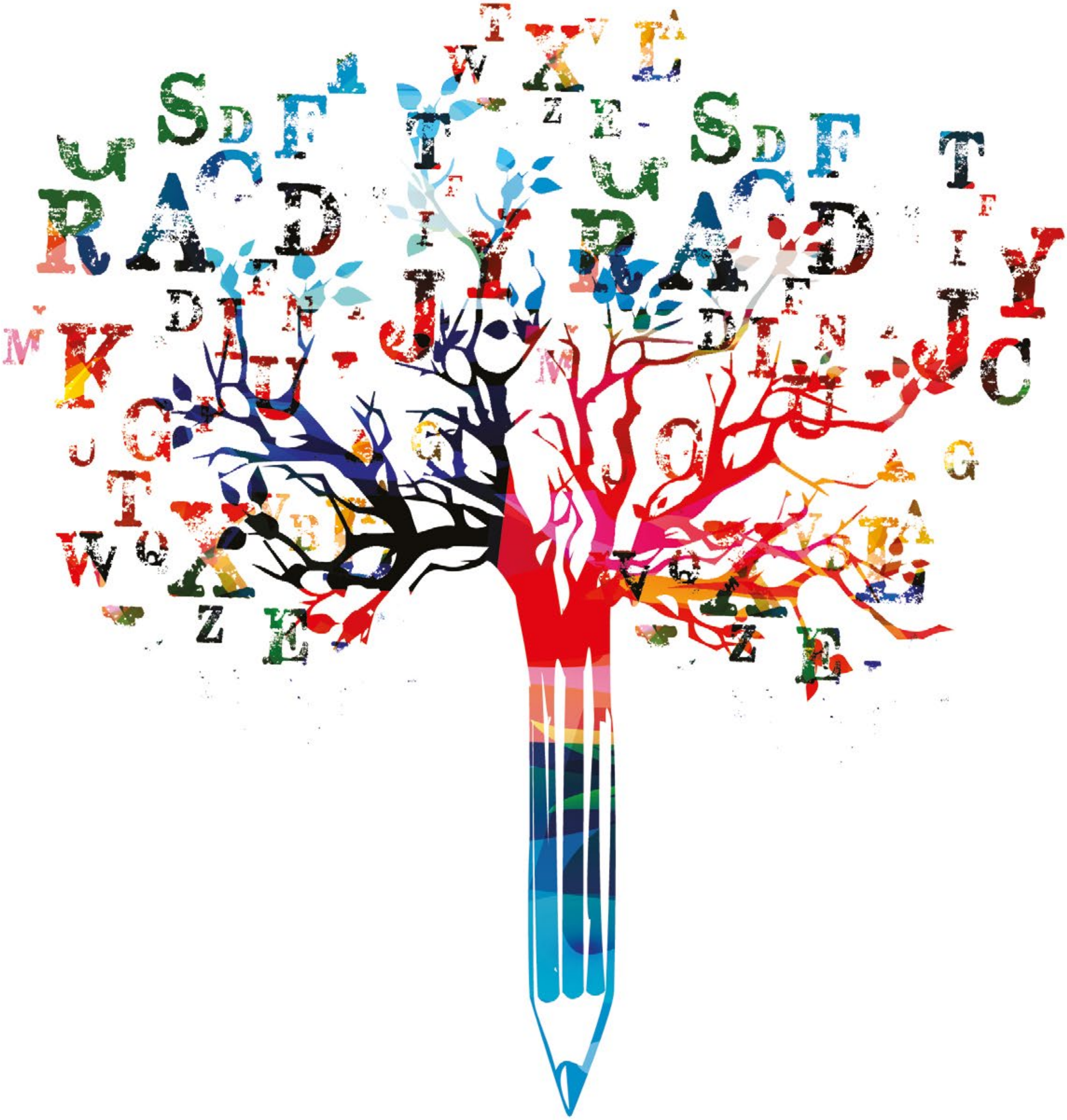
> There are 11 million people in the UK who are registered disabled with 50% aged over 65. Due to increasing longevity and advances in medicine, the size of the market is set to grow further. The opportunity for the travel industry to provide holidays for disabled customers is substantial, especially in the UK, as many disabled people are simply not able or not confident enough to travel abroad.

> Although one in six respondents had someone in their group with a disability, there was a surprisingly low citing of dementia in the list of options, despite this being a condition which affects over 850,000 people in the UK and this number is growing. This suggests that the vast majority of people living with dementia are not taking any kind of holiday.

Debbie Marshall
Silver Travel Advisor

More needs to be done to make tourism more accessible - we work with tour operators and visit boards across the world and our full data set has detail on a range of UK destinations by sub-groups, holiday type and hospitality type. Do get in touch if you'd like to hear more of our thoughts on this issue.

> It is clear from the findings of this survey that there is much work to do in the area of accessible travel, especially in the provision of good quality information and the provision of holidays which are well-suited to individual requirements. The fact that almost 30% of respondents stated that they were prevented from taking a holiday at all due to their disability should be a seen as a significant opportunity for the travel industry.



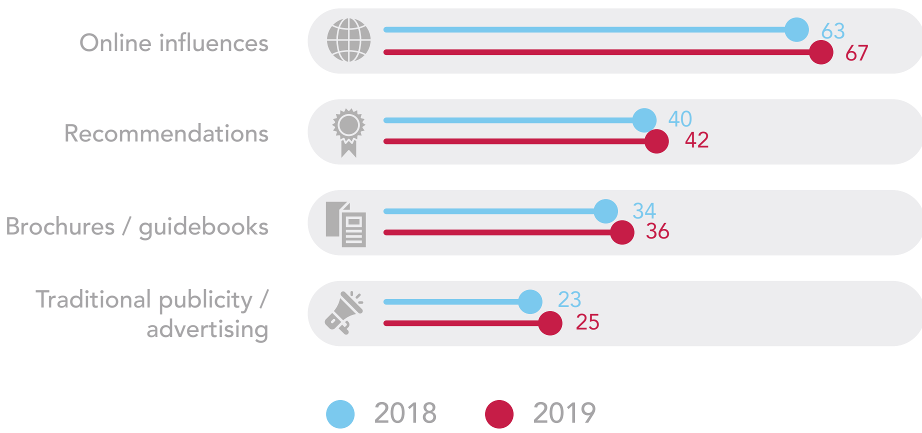
Holiday Planning Information Sources

Online information sources dominate our holiday planning, although traditional channels like travel agents and brochures continue to play a role

Holiday planning is a complex process that occurs over an extended period of time and across numerous devices and touch points. To aid with understanding, we simplify the process into two stages. The first – the inspiration stage – is arguably always ongoing, with passive and proactive engagements shaping a short-list of potential destinations. The second – the organising stage – is when the holidaymaker has a firm idea of where they are going to go, but has yet to decide on the details of destination and accommodation. In this section we look at the varying information influences on holiday choice.

Overall, online publicity and advertising have the strongest influence on holiday choice, driven by search engines, review sites, resort or tourist board websites and price comparison sites. Recommendations are also important, with two in five having been influenced by one (one in four received recommendations from friends and family, and one in nine from a colleague). There is also a role for brochures and guidebooks, with 34% citing them as an influence. There is some separation in influence depending on the stage – recommendations, travel agents, brochures and social media all more likely to be used at the inspiration stage of the holiday.

Net influences on Holiday Planning

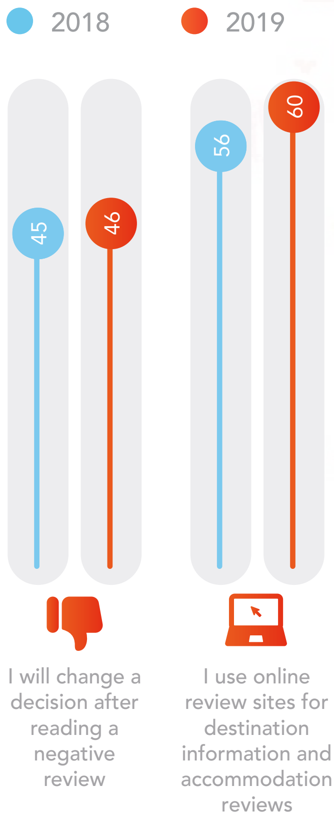


Top 10 Influences on Holiday Planning

	2018	2019
Search engine	30	33
Review sites	28	31
Friend/family recommendation	27	26
Travel agent website	17	18
Price comparison website	17	18
Online travel agent	16	18
Brochure picked up from a travel agent	16	18
Resort or tourist board website	19	17
Brochure posted to your home	17	15
Travel agent staff	14	15
Brochure that was downloaded	15	15

Of course, in the same manner that we have seen from previous sections, information influences vary by audience and holiday destination. Younger age cohorts are more likely to be influenced by all types of information, perhaps reflecting their relative lack of holidaying experience and higher propensity to visit somewhere new. Holidays to long haul destinations in North America and Asia are significantly more likely to be influenced by online publicity, with review sites and search engines being particularly influential.

The Trust and Value Given to Review Sites



Social Media Focus

Social media continues to play a significant role in holiday choice. Posts from friends and family are an influence for one in eight Britons, and around one in ten are influenced by an organisation's page or their social media advertising.

Trips to destinations in Asia are most likely to be influenced by an organisation's social media presence. This may be tied to holiday motivation – visitors to this part of the world are the most likely to be influenced to visit by 'history and culture' and 'authentic local experiences', both of which provide organisation's social media pages with scope to inspire and generate interest. By contrast, visitors to North America are least likely to be influenced by social media advertising, which is perhaps linked to more 'grounded' motivations for visiting such as 'lack of language barriers' and 'good weather'. Could more inspiring social media content inspire a rise in visits to North America?

10% influenced by an organisation's social media page

7% influenced by an organisation's social media advertising

Travel Agents and Brochures

As the importance of online information grows, the relevance of traditional sources of information (such as travel agents and printed brochures) is called more and more into question. However, our research would suggest that both remain influential. Travel agent staff were still an influence for one in seven British holidaymakers on their last main holiday, similar to 2018. Physical brochures are even more important, with 34% of Britons saying they influenced their holiday. Other research we have supports this, demonstrating people's need for a physical document that they can easily navigate and share with others. In much the same way that the rise of e-books hasn't yet caused the demise of the physical book, the brochure is likely to stick around a while longer too.

15%
influenced by travel agent staff

34%
influenced by a brochure

> The continued growth in online and digital media influencing travel decisions is no surprise in our industry, which benefits significantly from the engaging and rich media available on these channels. This will continue every year for the foreseeable future, as we are able to access a continually improving quality of online content, on better and better devices, in real-time.

Anthony Rawlins
Digital Visitor

> The findings of social media and how they influence particular types of travel is interesting, and resonates with this point. When a place or experience needs better communicating, rich media, social media and digital are dominant. For more established destinations or brands with traditional offerings, this might not be as important – unless of course they would like to reach new audiences and change perception.

Marketing evaluations are a core part of what we do at BVA BDRC, and we offer a TripAdvisor analysis and social media sentiment analysis within our suite of techniques. We also work with a range of media partners, so get in touch if you'd like to work with us in this area.

About BVA BDRC

BVA BDRC is an award-winning international consumer insight consultancy, conducting research in over 90 countries. The agency, part of the Paris-based BVA Group, offers the complete range of research consulting and business transformation. We help brands get closer to their customers, improve customer experience and grow the bottom line.

Our dedicated Culture, Tourism and Hospitality teams work with many of the world's leading tourist boards, tour operators, attractions and hotels. We'd love to help you with any research problem – big or small – so do get in touch with one of our directors.

Methodology

The BVA BDRC Holiday Trends Report 2019 is based upon up-to-date primary research among a nationally representative sample of 1,000 UK adults. The sample is representative of the UK population according to age, gender, region and social grade. All respondents were interviewed online in the first two weeks of January 2019. A breakdown of demographics can be provided on request.

The research was hosted by Alligator Research. Alligator Research is the BVA BDRC Group's digital research specialist, focusing on bridging the gap between research users and technology and specialising in survey design, quick polls, mobile, fieldwork and data collection, dashboard reporting, communities and qualitative online research platforms. Alligator is committed to bringing innovative methodologies to the market, without ever compromising quality.

Alligator won the MRS Operations Award for Best Data Collection (Online) in 2015 for work with Barclays into developing online surveys for use by visually and learning impaired respondents, and was also shortlisted for the MRS Award for Best New Agency in the same year.

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