

Holiday Trends 2016



Foreword

We're delighted to launch Holiday Trends 2016, our annual report on the intentions, motivations and attitudes of the British holiday-maker. This year's report offers a range of fascinating insights which we hope will give destinations and holiday-providers a steer for the coming year.

Most notable is the fall in intention to take holidays of 4+ nights, and the drop in the number of destinations Britons are considering. Although we are not certain why this is happening, the data points towards a volatile world situation creating a 'safety-first' British holiday-maker.

'Main holidays' in the UK continue to decline, but it's reassuring that domestic short-breaks are still on the rise.

It is great to see the diversity of the – the top 4 destinations taking in mountains, coastline, lakes, and the city!

Elsewhere, there are some great findings on the information we use to 'inspire' and to 'plan' a holiday, particularly how we use our friends for one but not the other!

We have tried to make the report interesting and engaging. Inevitably this has meant leaving out trend and sub-group data where it didn't add anything to the story. But if you would like any further information (there is lots!), do get in touch and we'll be happy to provide.

Thanks and enjoy!



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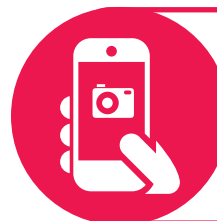
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Top trends for 2016



Top Trends for 2016 (*recommendations in italics*)

Fewer main holidays in 2016

The intention to take a holiday of 4+ nights and the range of holiday destinations Britons are considering in 2016 is lower than in 2015. Anticipated spend on holidays has also declined, and there is growing pessimism around job security.

A low intention to book doesn't necessarily mean lower actual bookings, but destinations will need to stay top-of-mind and ready for last-minute, value-driven decision-making.

Safety-first British holiday-makers

Safety will be a 'strong consideration' for 4 in 10 Britons in their holiday planning for 2016. This group is also significantly less likely to plan on travelling abroad. Linked to safety, we can see a steady decline in intention to visit North Africa, and Paris is regarded as less safe than New York and Beijing. In line with ABTA data, traditional destinations remain the most popular overseas choices.

Destinations will need to demonstrate the safety of their destinations to persuade risk-averse Britons to visit, particularly if overseas. [Read our blog](#) for more on this.

UK short-breaks on the up

For the second consecutive year, the proportion of Britons taking a short-break at home has increased. The UK is overwhelmingly viewed as a short-break destination, 73% of Britons intending to take one this year, compared to 24% intending to take a UK holiday of 4+ nights.

UK destinations should shape their communications and activities around short-breaks

A varied UK offer

The Scottish Highlands, Cornwall, the Lake District and London are the four most popular UK destinations. The mix of mountains, coastline, lakes and cities highlight the diversity of the UK's offer. Natural beauty and nearby sights are the most important motivations for a UK holiday.

Where possible, UK destinations should communicate the natural beauty and 'tick-box' places nearby

Top Trends for 2016 (*recommendations in italics*)

Bucket-list Britons

The average Briton takes a bucket-list holiday once every 3 years, rising to more than once every couple of years amongst 18-34 year olds. This finding is linked closely to the rise in experientialism, particularly amongst the 'FOMO' younger generation.

The desire for unique experiences is growing and destinations should communicate must-see and must-do.

Holidays influence by people we trust

On average, Britons took around 5½ hours to dream, plan and book their main holiday in 2015. Although they used a combination of information sources, 4 in 5 were peer-led (word of mouth, friends' social media or review sites) or expert-led (travel agents). Search engines also played a major role in the process.

Destinations need to ensure their SEO is maximised but also encourage word of mouth through positive reviews and social media sharing

18-34s and families engage most with marketing

Families and 18-34 year olds are significantly more likely to engage with information sources. Research we have conducted elsewhere demonstrates that families tend to be risk-averse so draw on a range of sources before making a decision. 18-34s year olds are less likely to have settled on regular destinations than older generations, they are more likely to be on social media, and to be part of the trend towards experientialism.

Ensure communications offer clear and inclusive messages for these audiences

Most activities are planned before the holiday

Around 3 in 5 of Britons planned all or most of their activities before they went on their most recent holiday (18% all, 40% most). On the holiday, leaflets at accommodation, chatting to locals or chatting to other holiday-makers are the most common sources of additional activities.

Non-digital communications play an essential role for holiday-makers. Attractions and other venues should work with accommodation providers to maximise their visitor numbers

Read our opinion...

For deeper insights on Holiday Trends and a lot more, check out our blogs at www.bdrc-continental/opinions

Safety Fears to have a major impact on Holidays in 2016



Generation Y and Baby Boomers. A world apart?



Wellness for all



Holiday Trends in Context
- Webinar Q&A



The Staycation on the slide?



Polarised Britain: How is it reflected in holiday-taking behaviour?

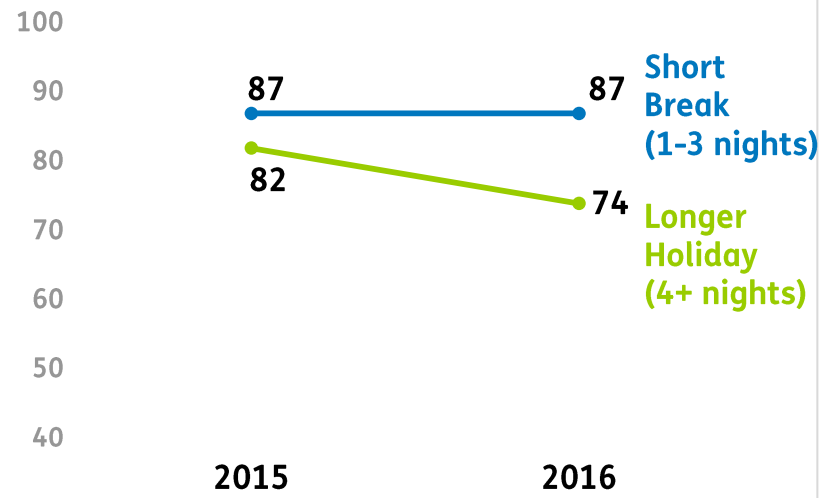


Holiday intentions

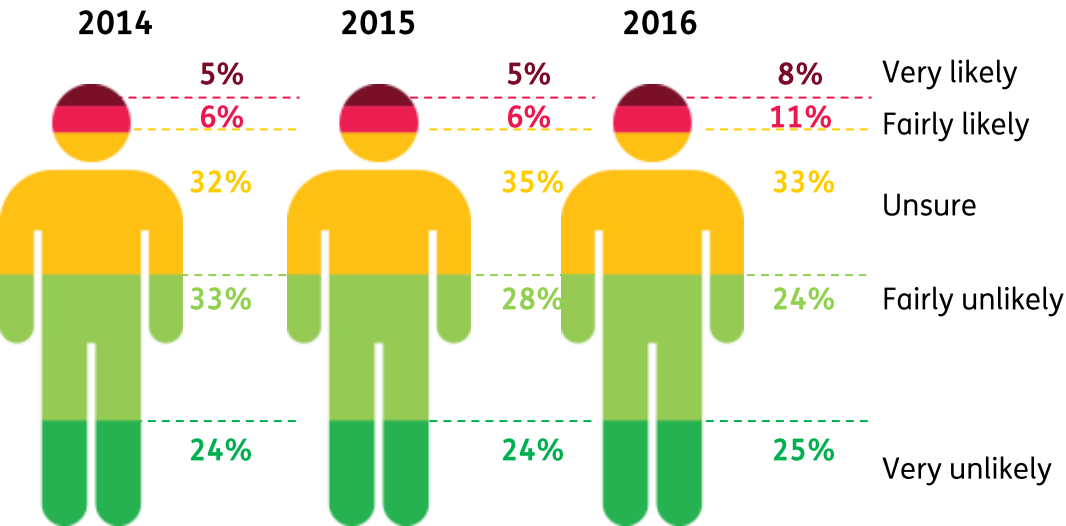


Holiday intentions summary: Britons expect to take fewer holidays of 4+ nights and are considering fewer destinations in 2016

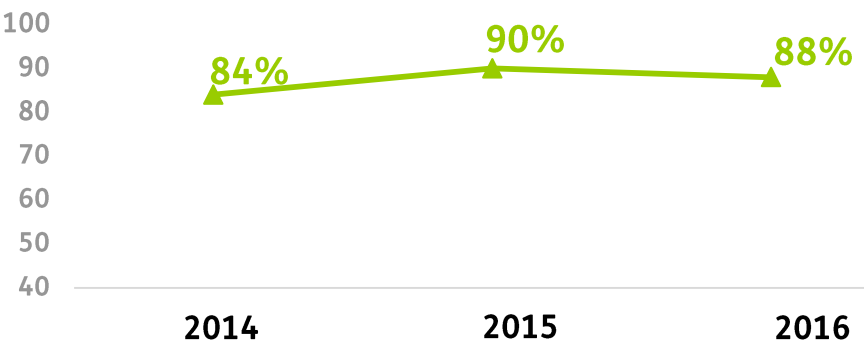
Intention of taking a holiday (%)



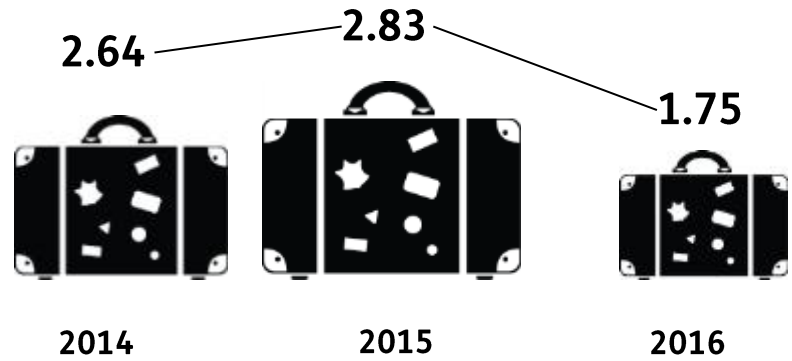
Likelihood of losing my job (%)



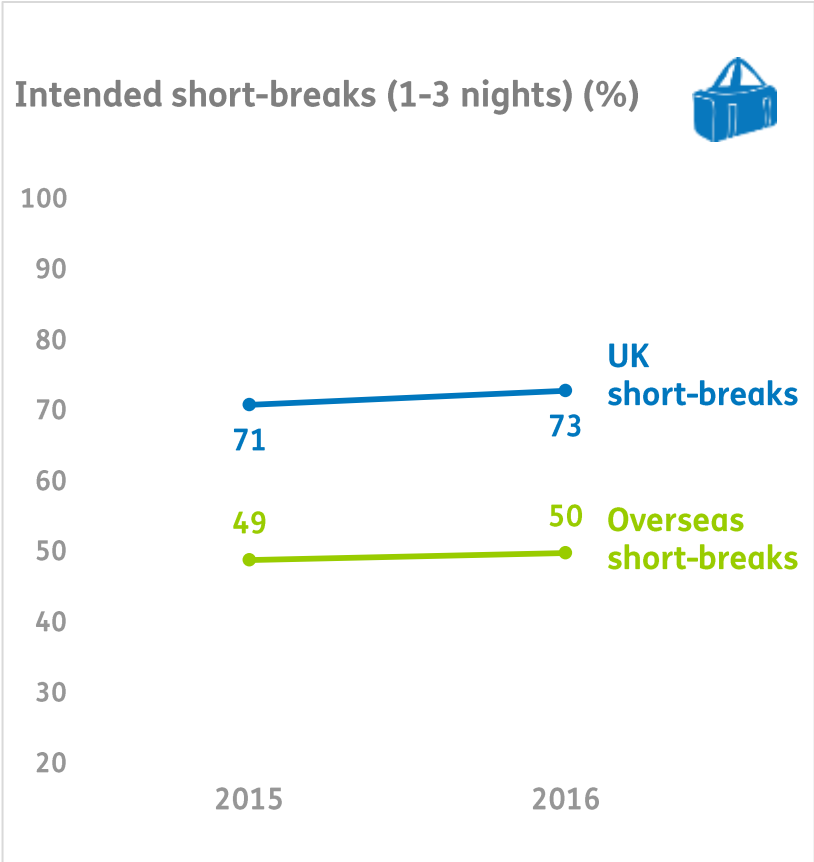
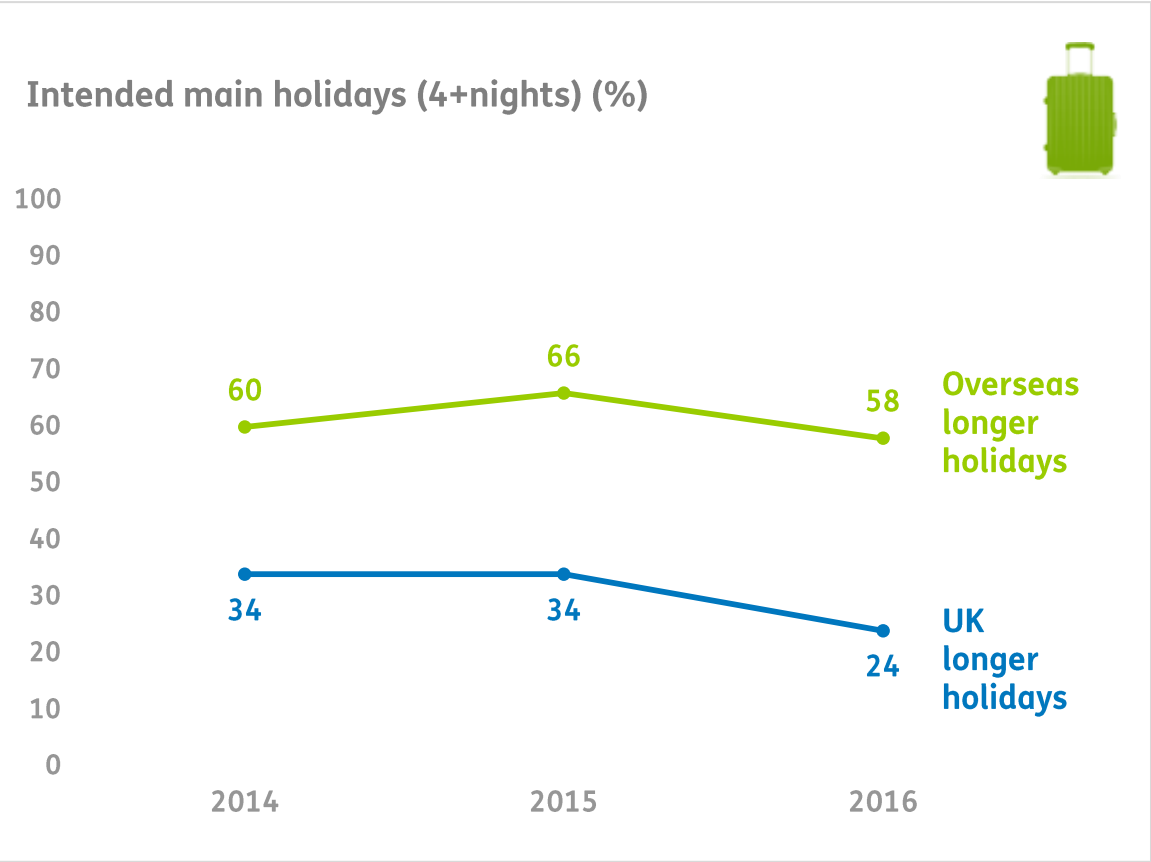
Expect to spend more or the same on holidays as previous year (%)



Average no. of destinations considered



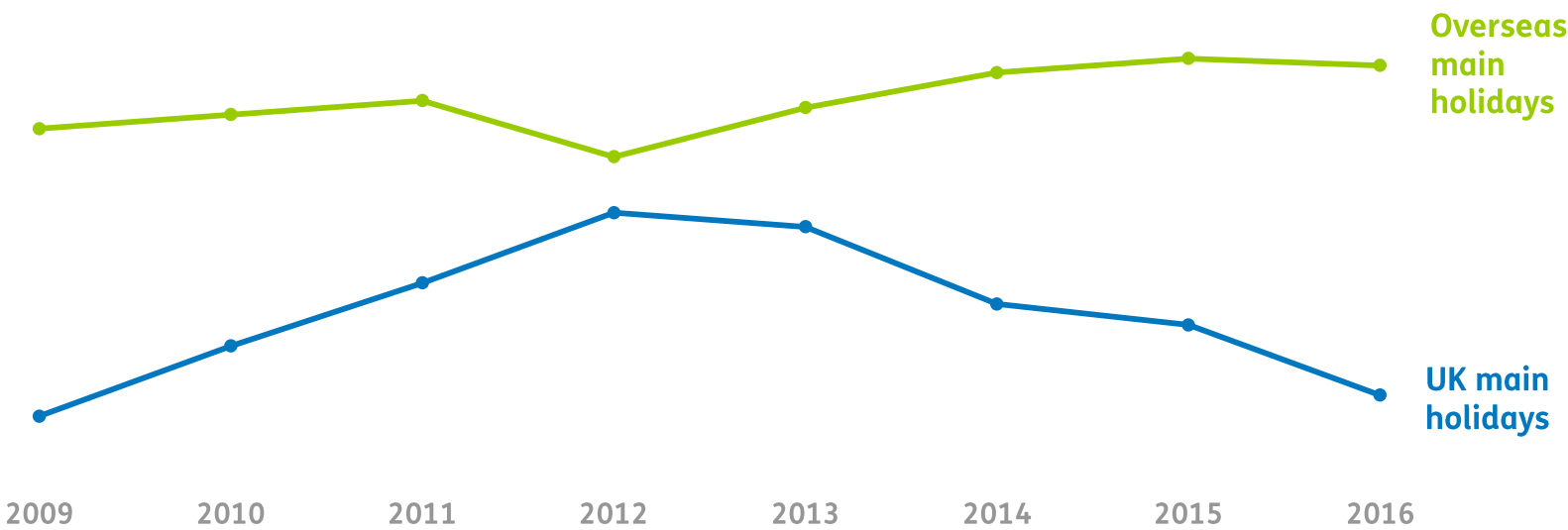
Overseas and UK holidays: Britons plan on taking fewer holidays of 4+ nights abroad and in the UK, but this is in part traded for short-breaks



To account for a questionnaire change, main holiday data pre 2014 is not shown. Main holiday comparisons as far back as 2008 are available on request. Intended short-breaks question was added in 2015. Short-break questions were added in 2015

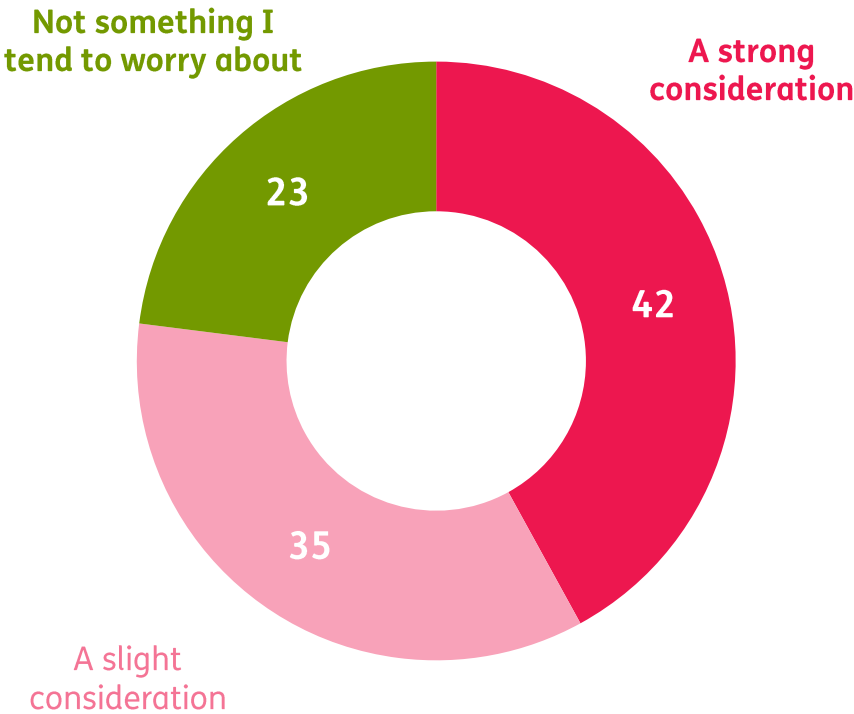
Long-term patterns: Trends over time suggest a return to pre-recession holiday patterns

Intended main holidays (4+ nights). General trend.

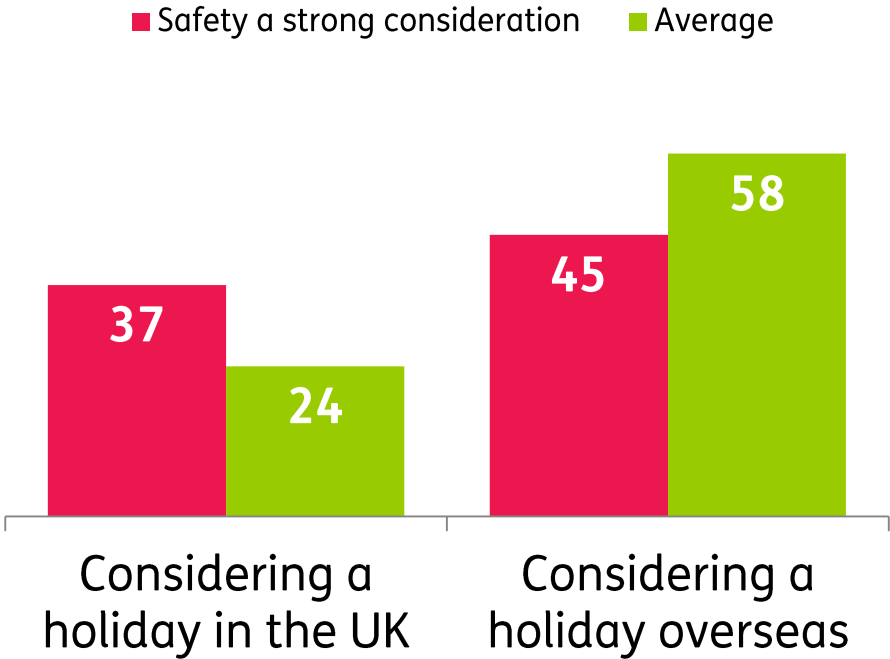


Safety concerns: Safety is a strong consideration for 2 in 5 Britons, who are less likely than average to consider a holiday overseas.

Role of safety when planning holidays in the next 12 months (%)

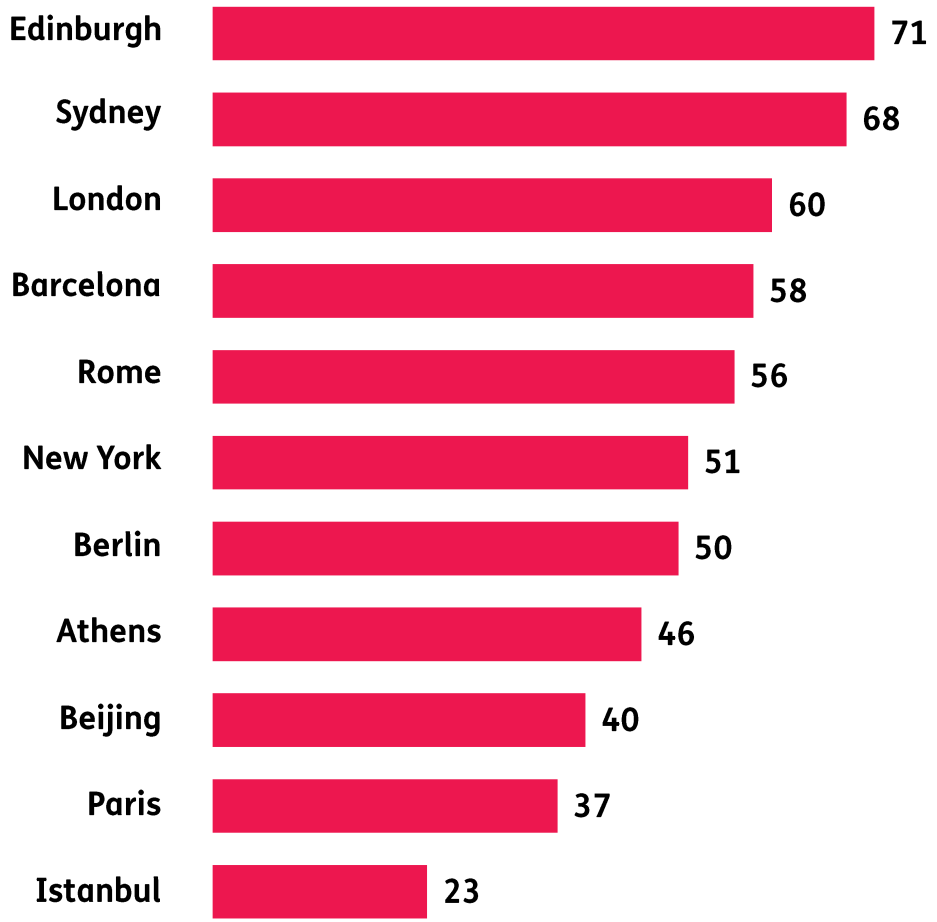


Main holiday intentions by importance of safety (%)



Safest cities: Edinburgh is regarded as the safest city for a holiday, Paris less safe than all but Istanbul.

Perceptions of safety in world cities* (% very/fairly safe)



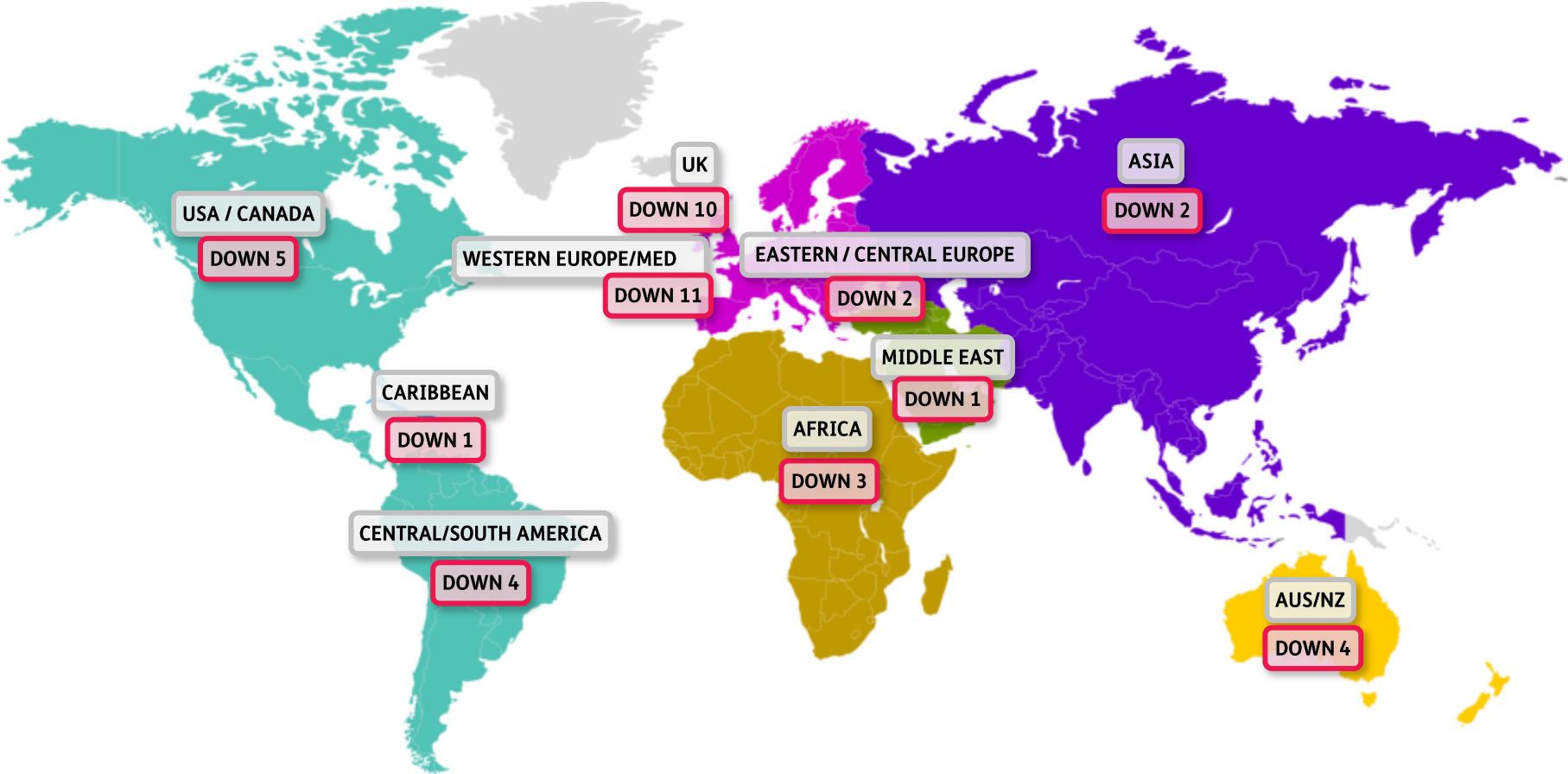
Cities were selected arbitrarily, to gain a snapshot of sentiment

Destinations & accommodation



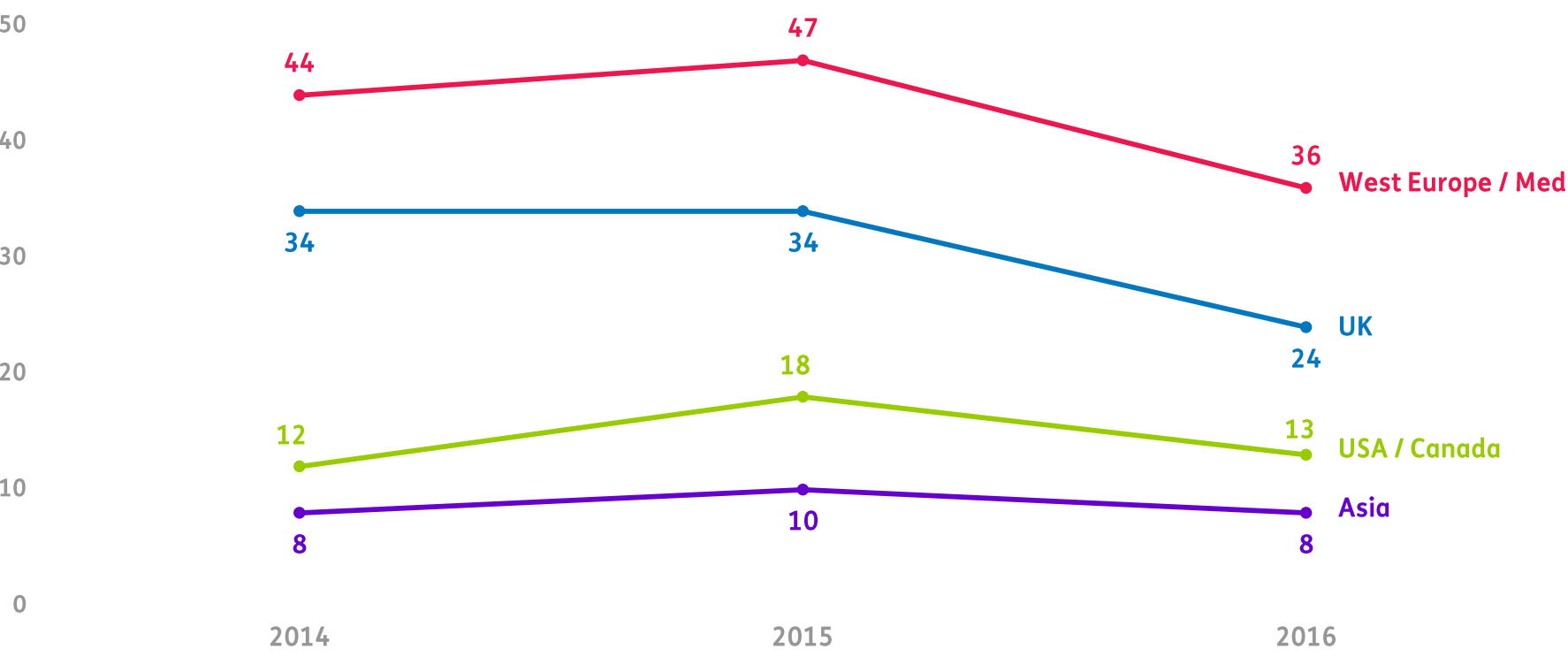
Destination intentions 2016 vs. 2015: All areas of the world are less likely to be considered for a holiday of 4+ nights in 2016

Percentage point change in Britons considering areas for a holiday of 4+ nights. 2016 vs. 2015



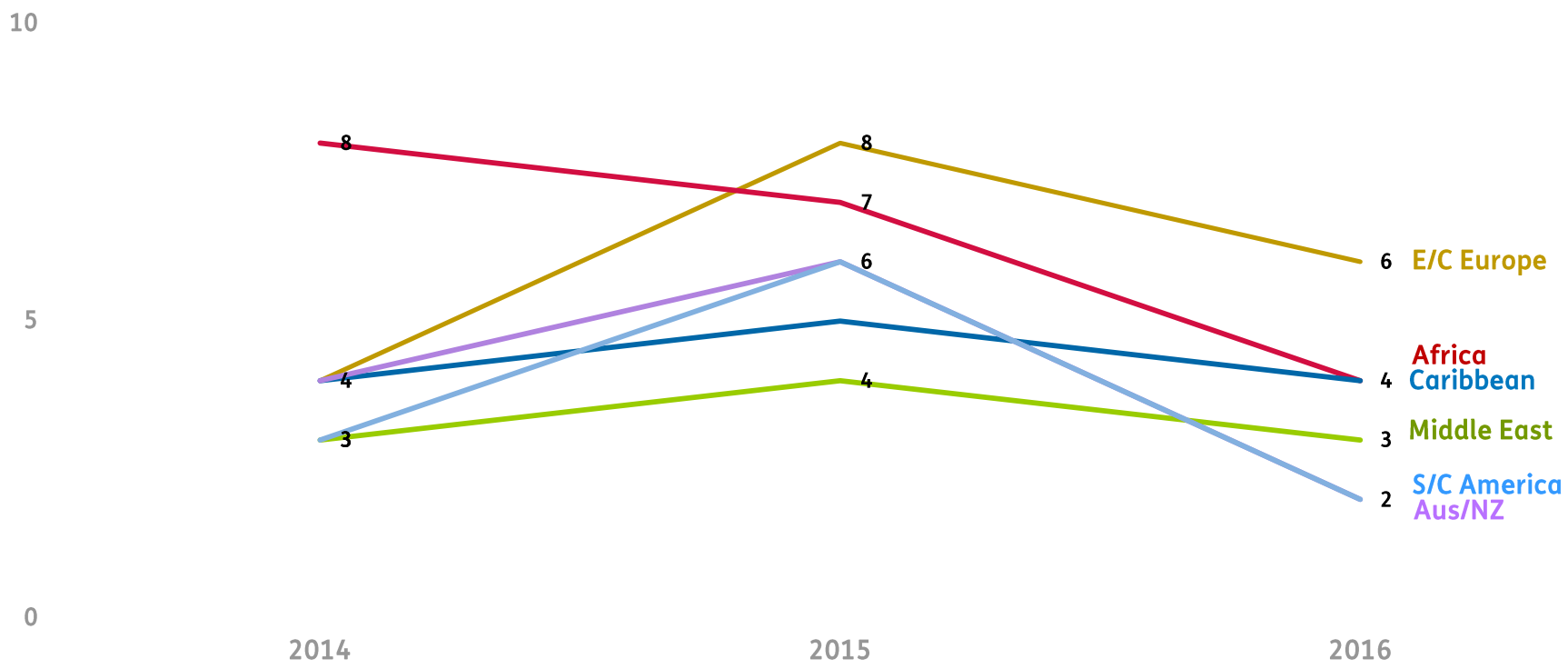
Destination trends: Intentions to holiday in the UK, Western Europe and the Mediterranean are at their lowest for 2 years.

Main holiday (4+ nights) intentions by region (%)



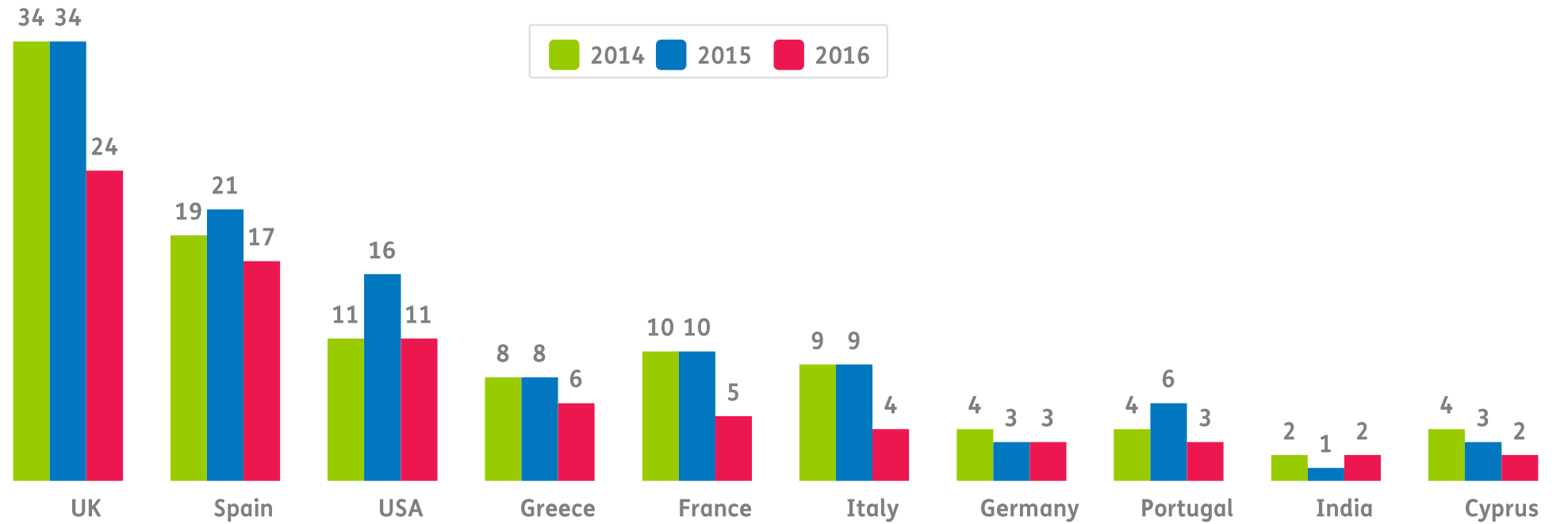
Destination trends: Intention to visit other parts of the world has dropped, particularly Africa

Other regions considered (%)



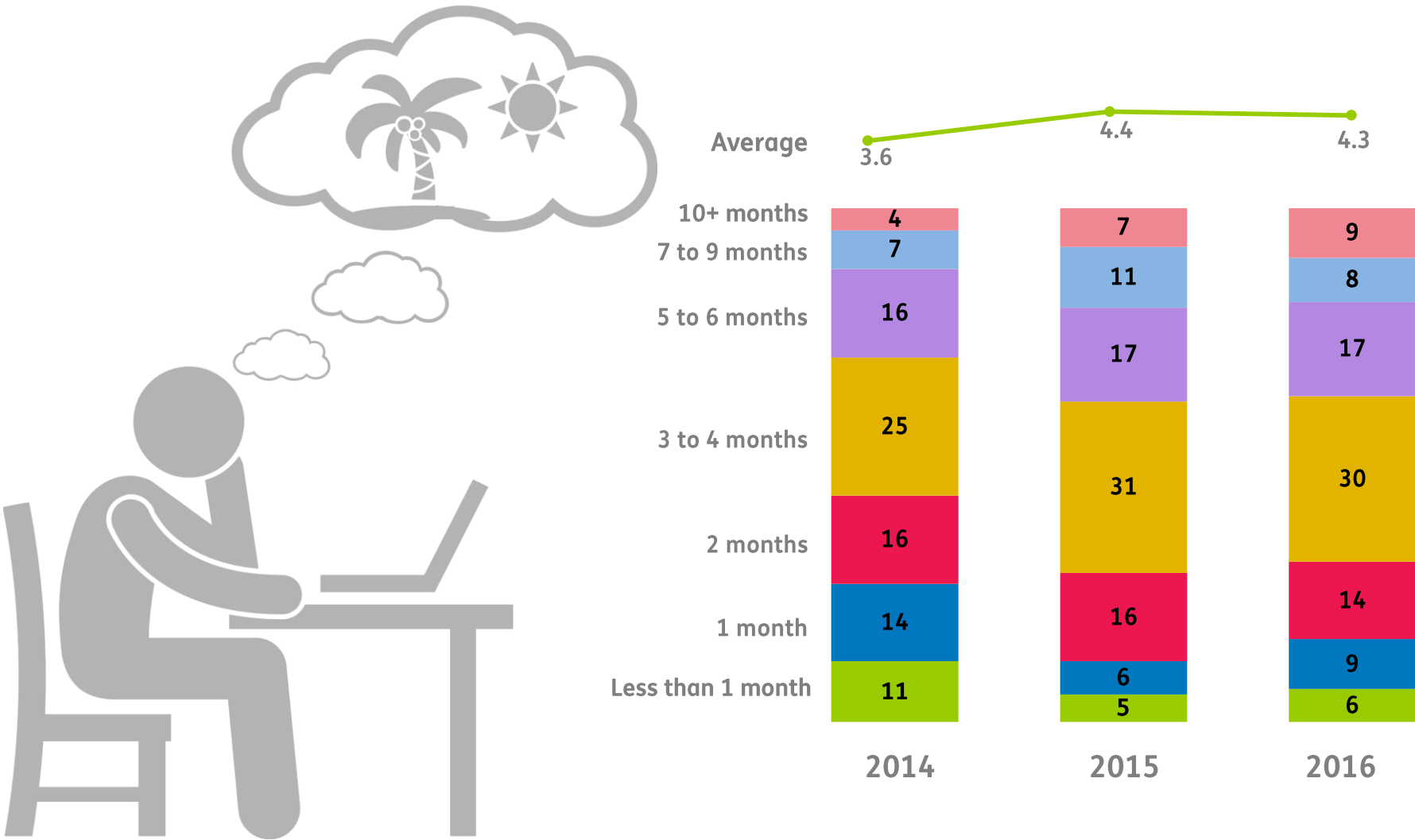
Destination trends: Spain remains the most favoured country outside of the UK, followed by the US, Greece and France

Leading countries considered (%)



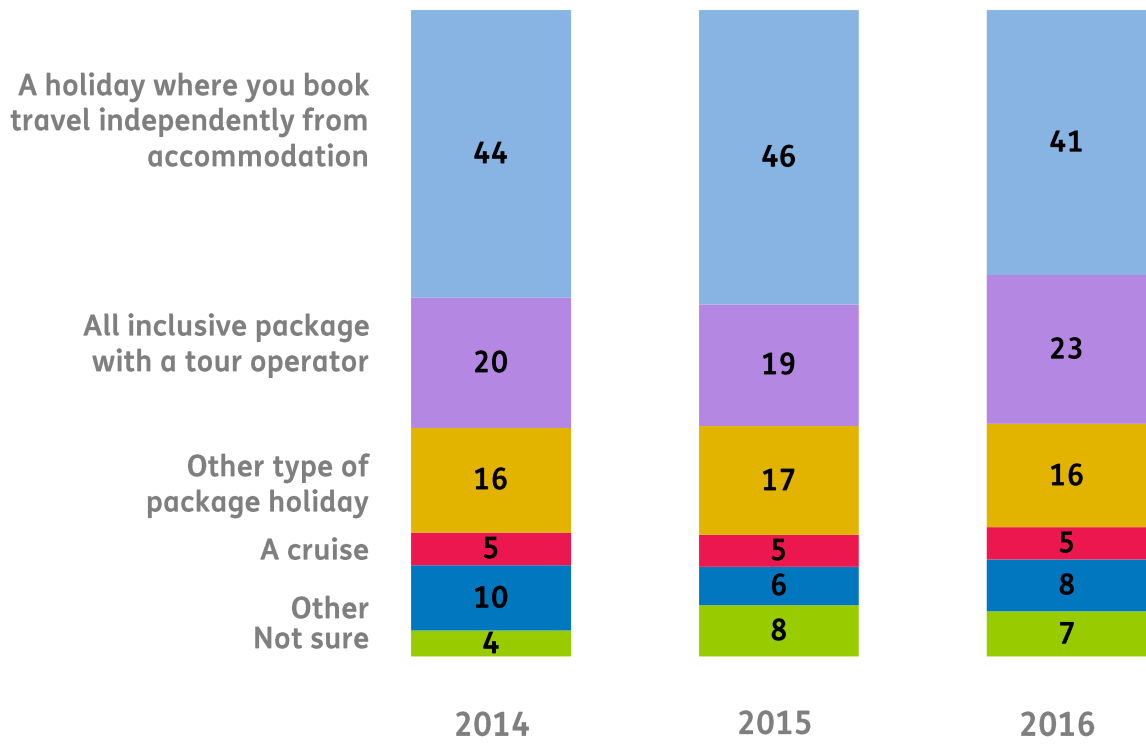
Booking lead time: On average, Britons will book a holiday of 4+ nights over 4 months in advance

Time between booking and departure for longer holidays (%)



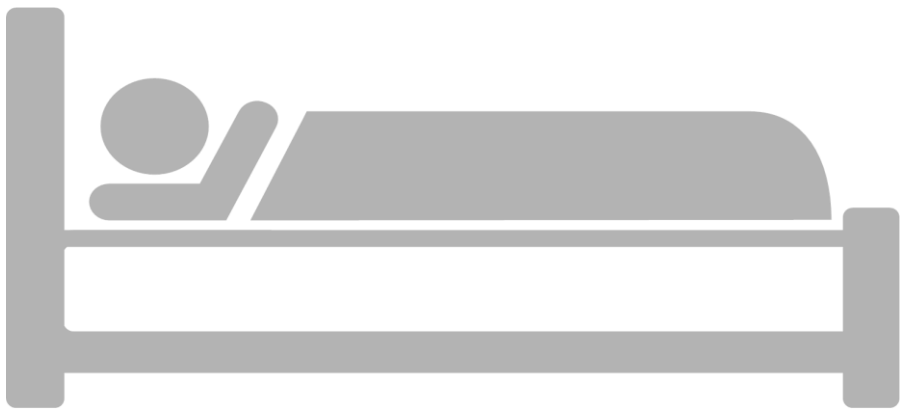
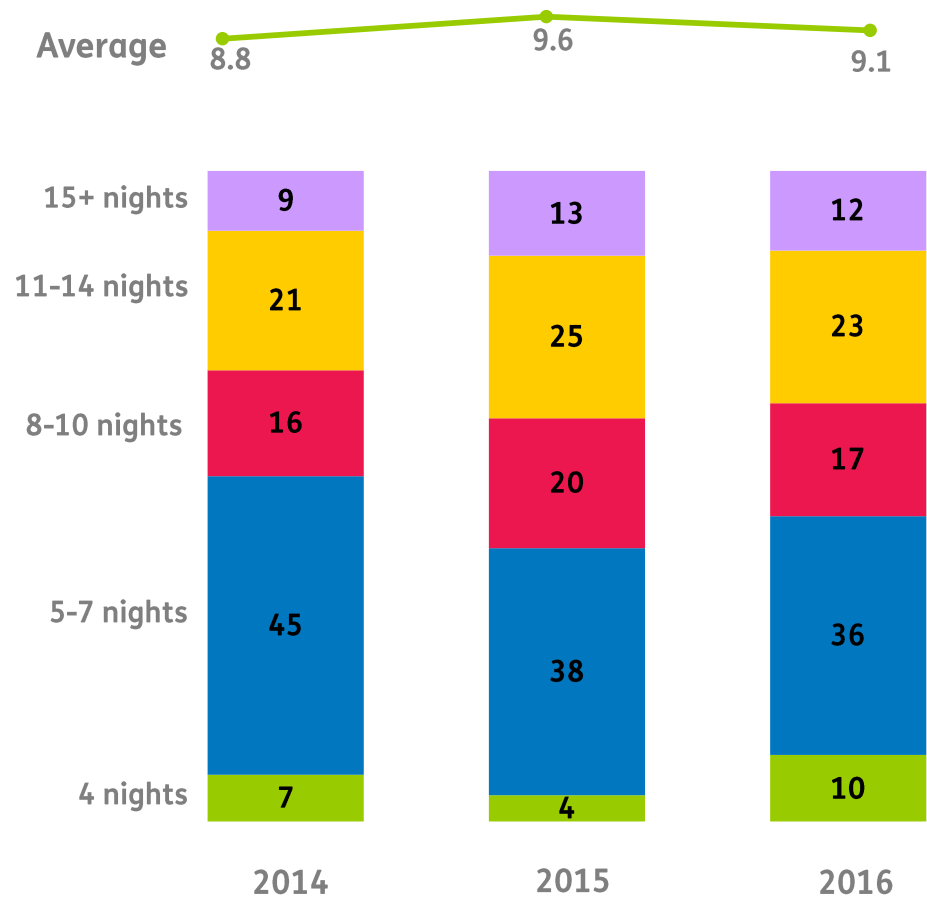
Holiday type: Accommodation and travel is most likely to be booked independently, despite a rise in anticipated package bookings

Type of holiday booked (%)



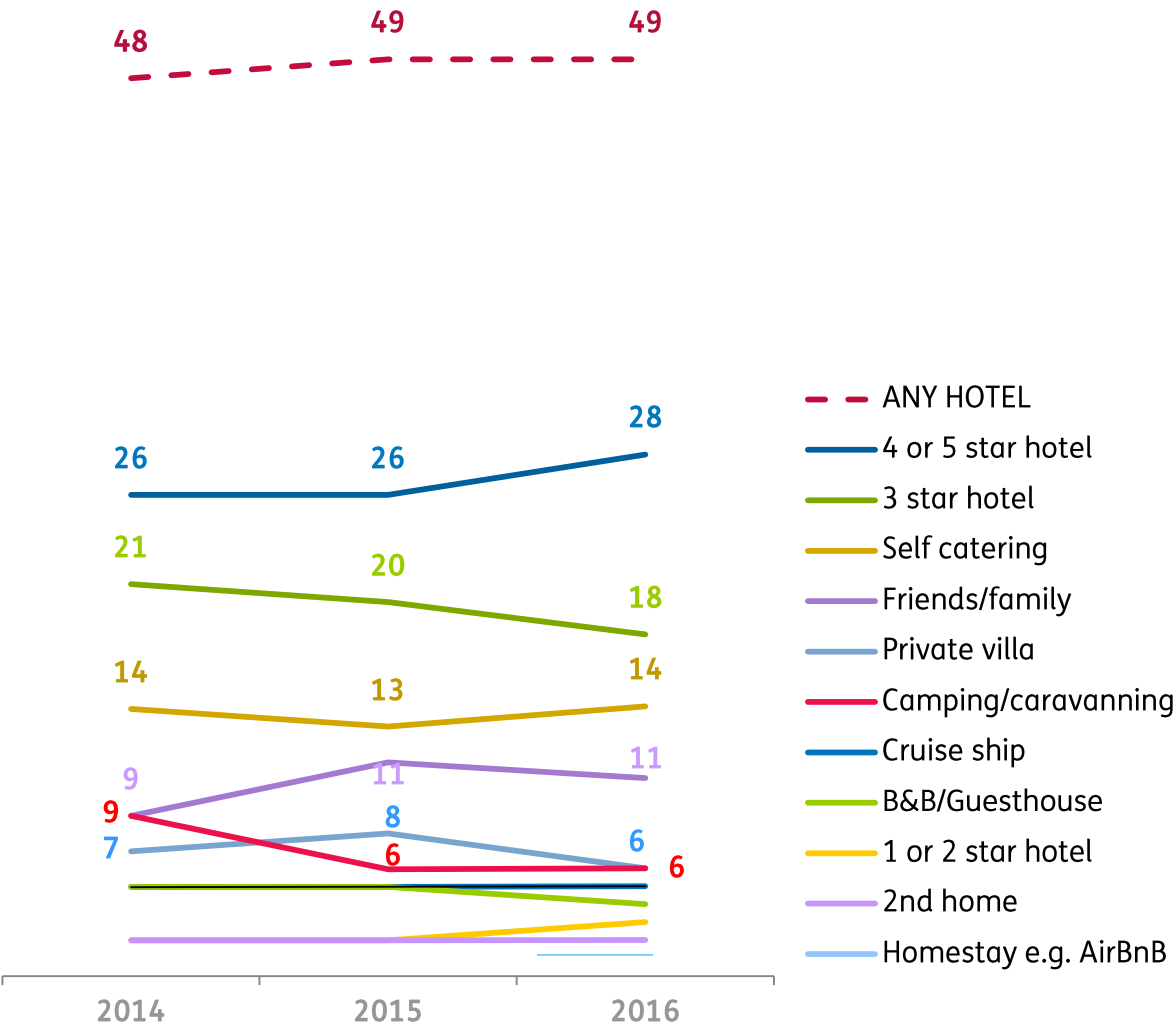
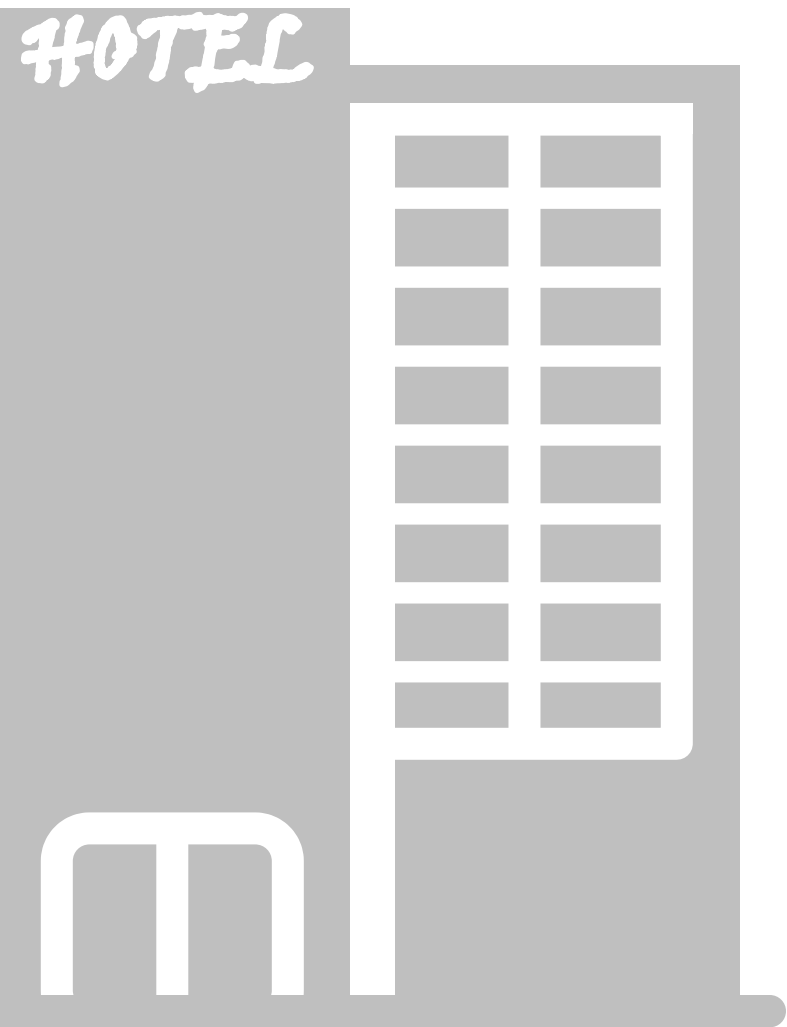
Holiday length: Longer holidays are most likely to take 5-7 nights, and around 9 nights on average

Nights expecting to stay on longer holiday (%)



Accommodation: Around half of Britons expect to stay in a hotel on their holiday of 4+ nights, consistent with previous years

Expected accommodation type on main holiday (Top 10 (%))



'Homestay' not asked in 2014 and 2015

Holidays in the UK



UK holiday summary: Domestic holidays are overwhelmingly likely to be short-breaks, Scotland and the South West the biggest draws

75%

WILL TAKE A
UK HOLIDAY



Short-break



Main holiday

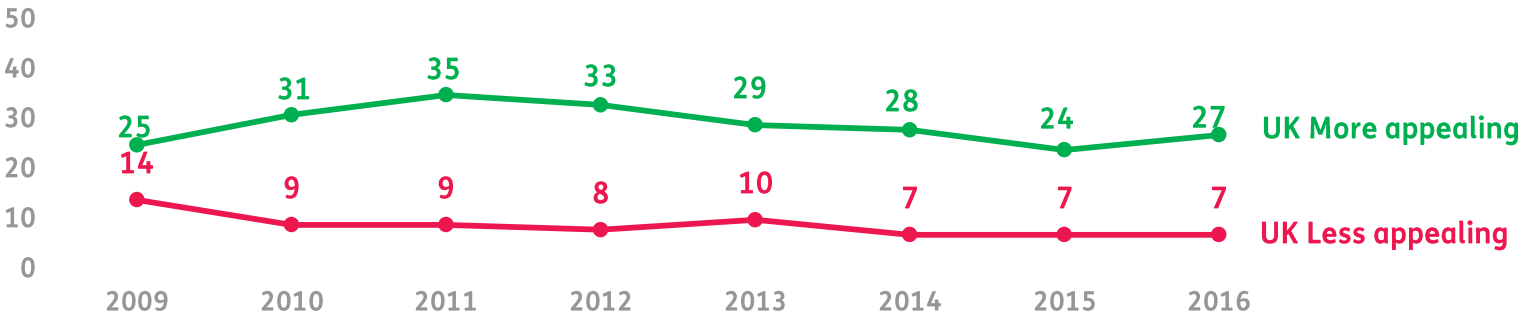
AREAS INTENDING TO VISIT

1	Scotland	23%	➡
2	South West	20%	➡
3	London & South East	19%	➡
4	Wales	14%	➡
5	Midlands	11%	➡
6	North West	11%	⬇
7	East England	8%	➡
8	Yorkshire	6%	➡
9	North East	5%	⬇
10	Northern Ireland	4%	➡

DESTINATIONS INTENDING TO VISIT

1	Scottish Highlands	13%	➡
2	Cornwall	11%	➡
3	Lake District	9%	⬇
4	London	9%	➡
5	Devon	8%	➡
6	Edinburgh	7%	➡
7	North Wales	7%	➡
8	South Wales	6%	➡
9	Yorkshire	6%	➡
10	Scottish Lowlands	5%	➡

Perceptions of the UK for a holiday compared to 'a few years ago' (%)

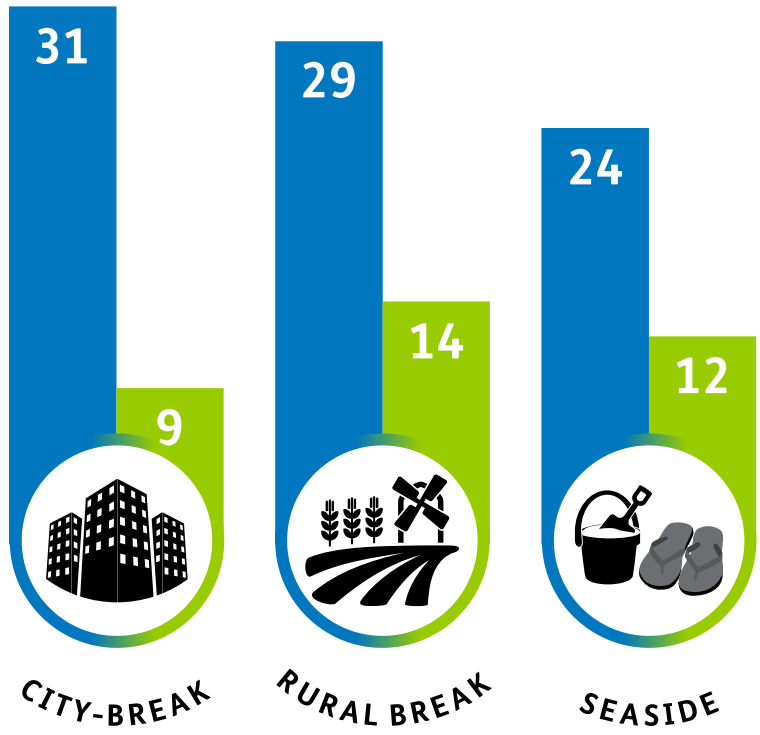


Arrows denote statistically significant differences to 2015

UK holiday types: City-breaks are most likely to be short-breaks, London, Edinburgh and York the most popular

PREDICTED UK HOLIDAY TYPE (%)

■ UK Short-break (1-3 nights) ■ UK Main-holiday (4+ nights)



CITY BREAK DESTINATIONS IN NEXT 2 YEARS

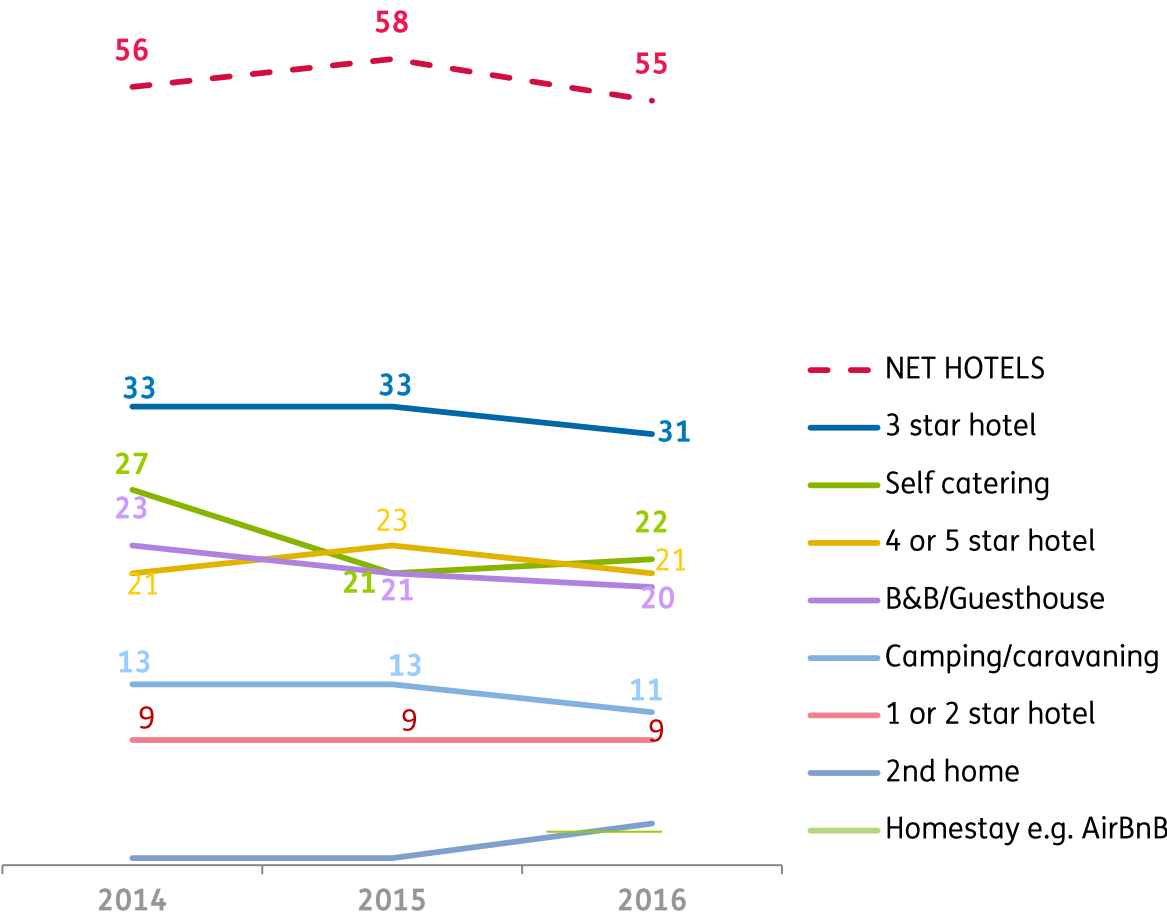
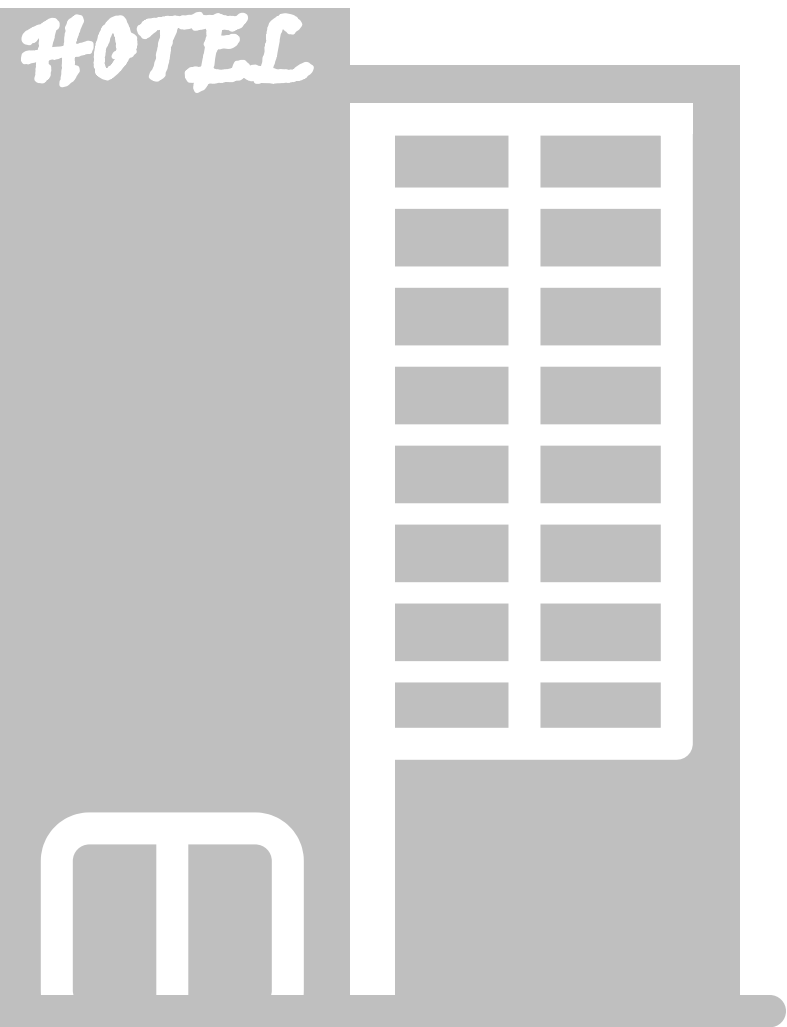
1	London	29%	6	Manchester	11%
2	Edinburgh	23%	7	Liverpool	10%
3	York	19%	8	Glasgow	10%
4	Bath	17%	9	Chester	9%
5	Oxford	11%	10	Cambridge	9%

ANTICIPATED UK SEASIDE DESTINATIONS IN NEXT 12m

1	Small seaside town	55%
2	Traditional seaside town	41%
3	Harbour town	33%
4	Non-urban coastal	24%

UK accommodation: UK holiday-makers are most likely to stay in a 3 star hotel on their breaks

Expected accommodation type on a UK holiday (%)



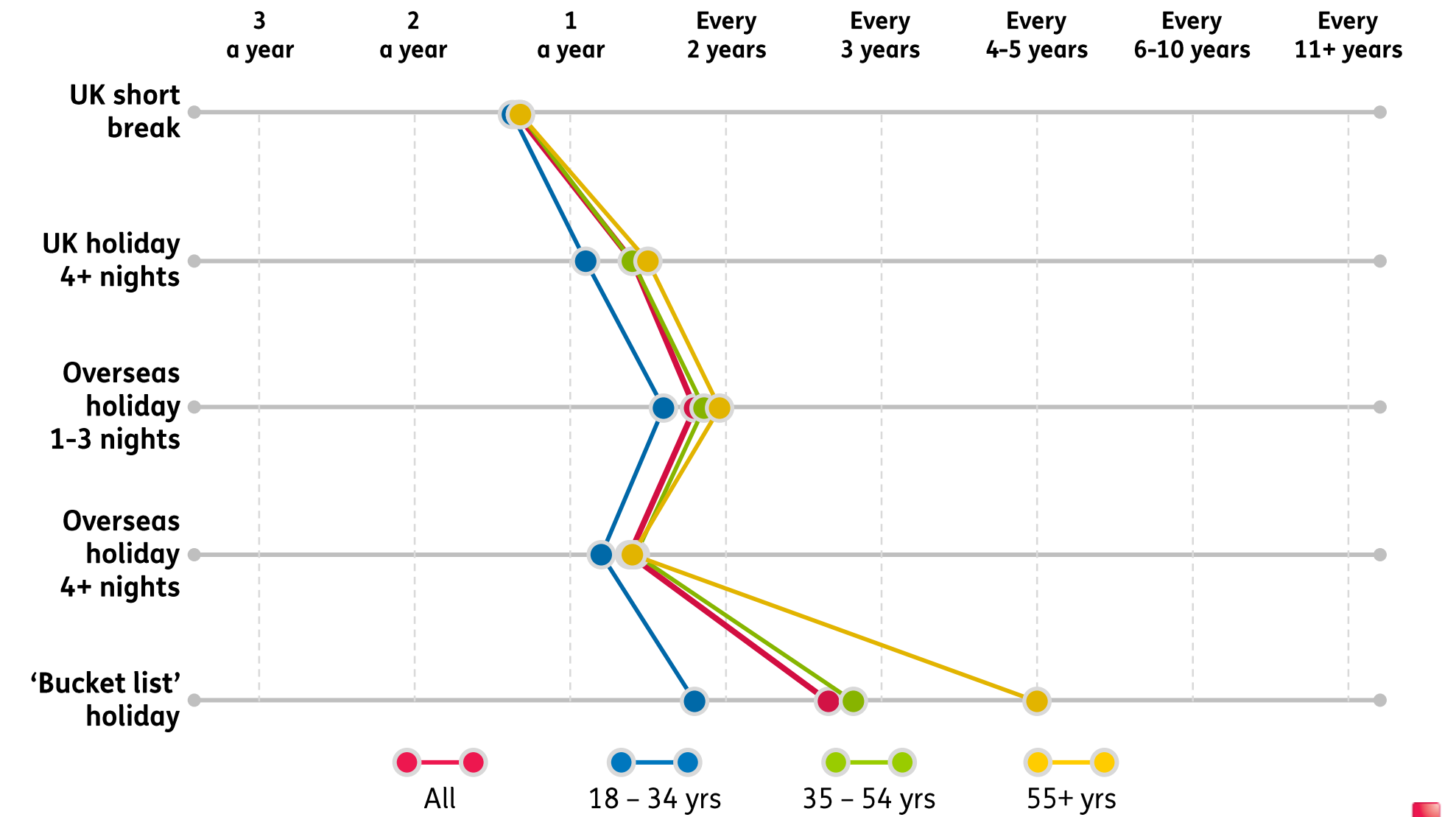
'Homestay' not asked in 2014 and 2015

Holiday motivations & planning



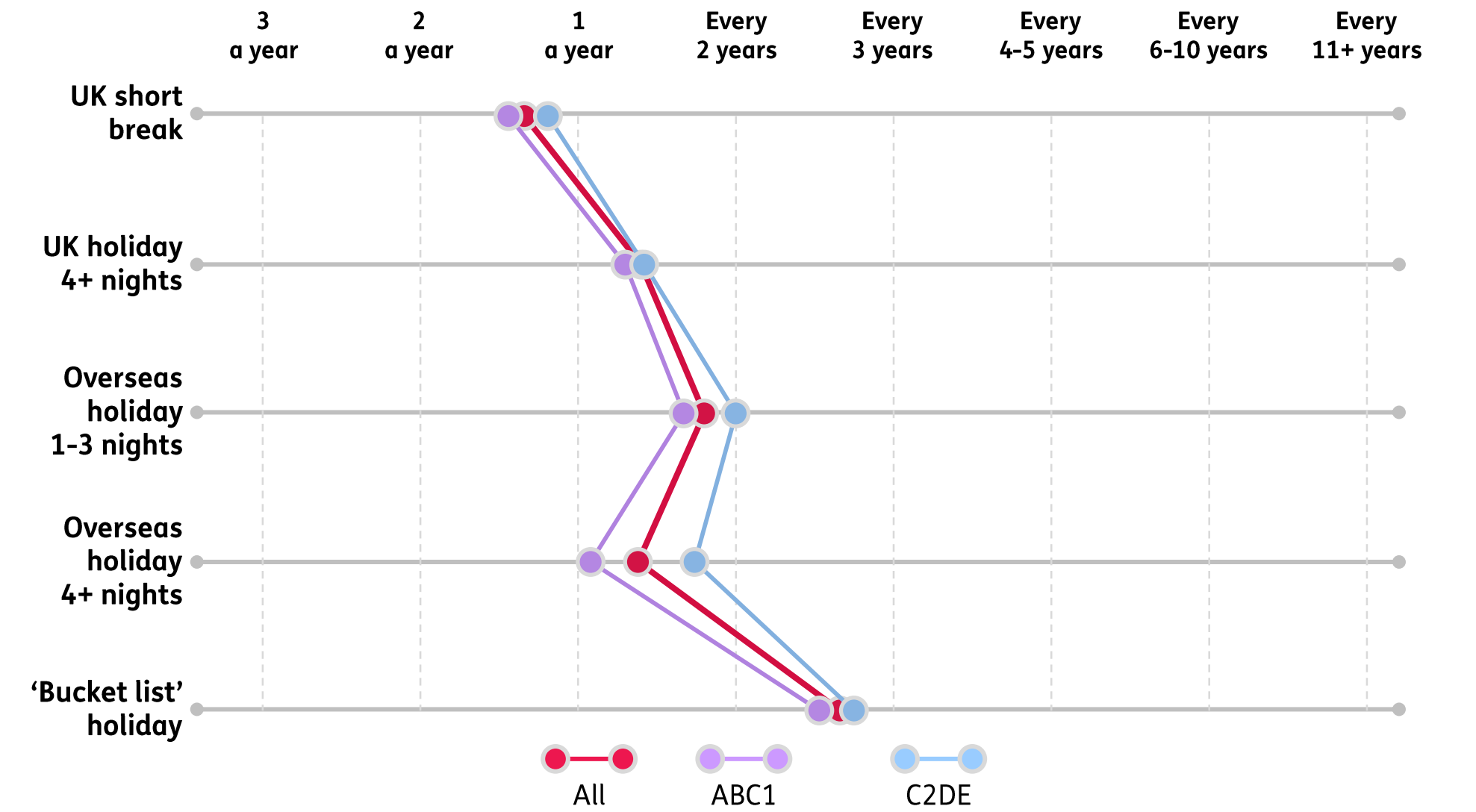
Holiday type habits: UK short-breaks are the most common type of holiday for all age groups; ‘bucket list’ holiday for 18-34 year olds

General holiday-taking habits (overall and by age)



Holiday type habits: Holiday type is similar across social grades, although ABC1s take more overseas holidays of 4+ nights.

General holiday-taking habits (overall and by social grade)

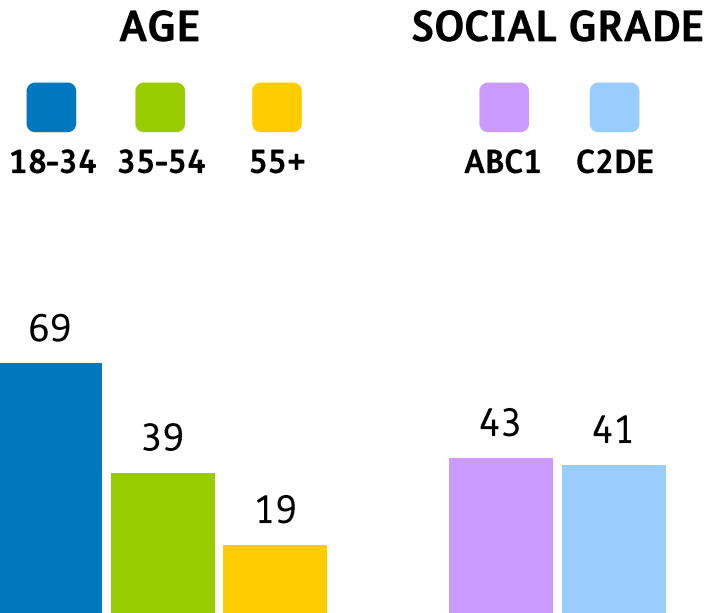


'Social grade' defines people by their job types. ABC1 is typically 'white collar'. C2DE is typically 'blue collar'

Wellness holidays: 1 in 5 Britons take a wellness holiday every year, rising to a third amongst 18-34s



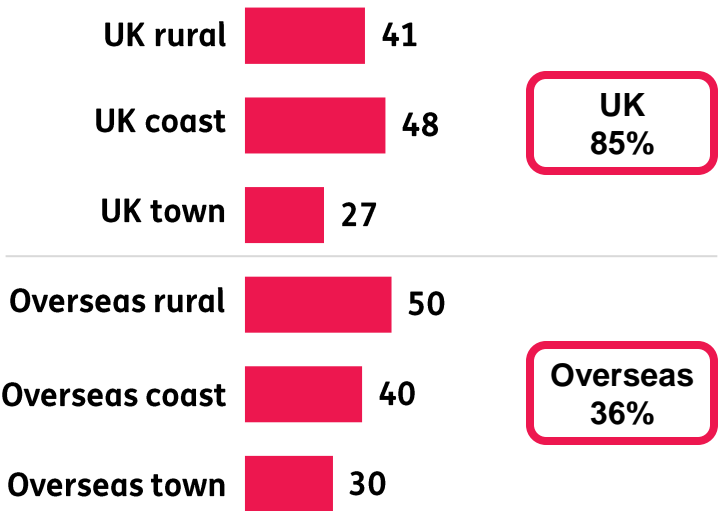
42%
Ever taken a wellness holiday



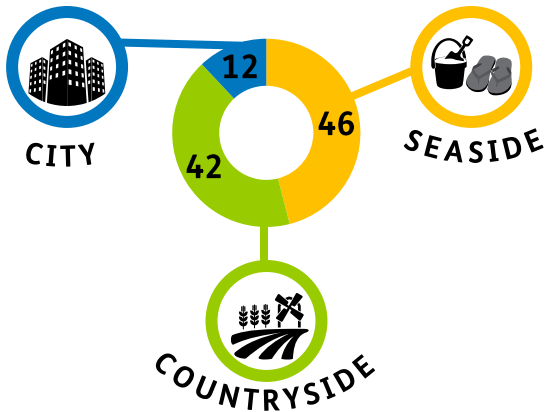
21%
Taken a wellness holiday in the last 12 months



WELLNESS HOLIDAY LOCATIONS (%)



WELLNESS HOLIDAY PREFERENCE

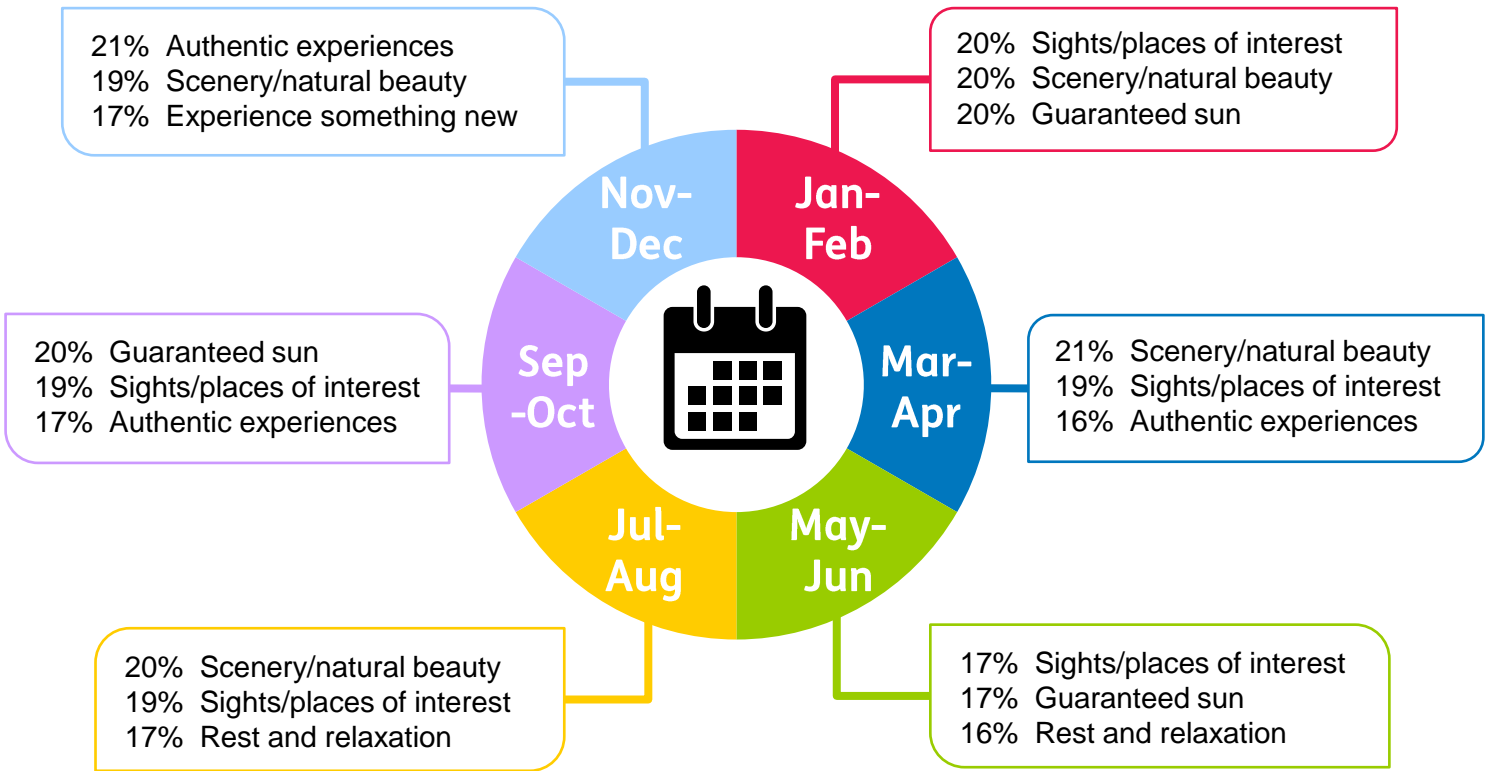


Holiday motivations: ‘Natural beauty’ is the biggest motivation for choosing a holiday, although there is some variation by month

Top 5 holiday motivations)

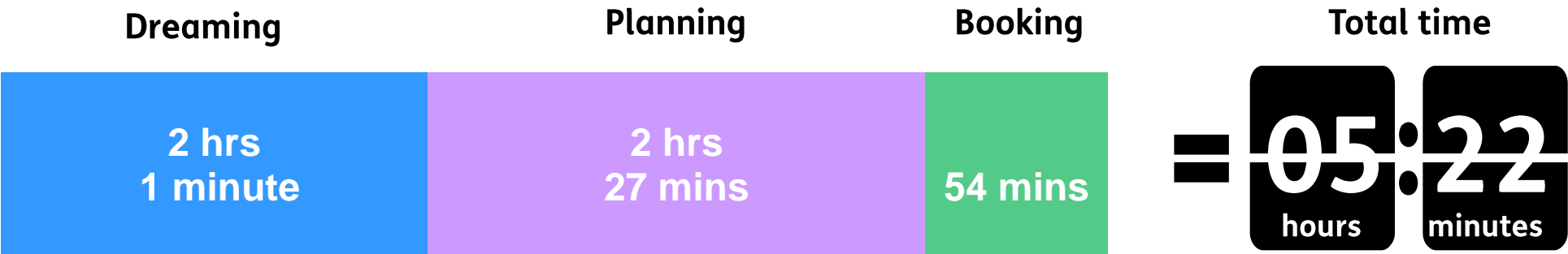
- 1 Natural beauty
- 2 Places of interest
- 3 Guaranteed sun
- 4 Visit beaches/coast
- 5 Rest my mind and body

Top motivations by time of year (%)

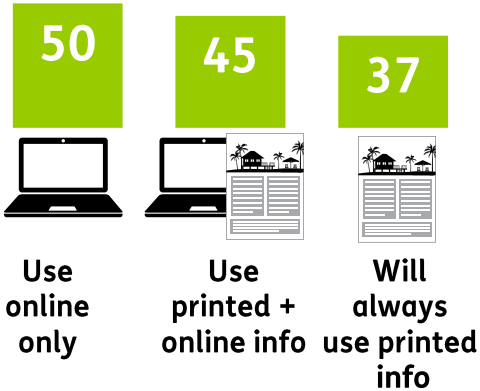


Dreaming, planning and booking: Britons take 5 hours 22 minutes to dream about, plan and book their holidays

Median average time taken before the holiday (taken from most recent holiday)



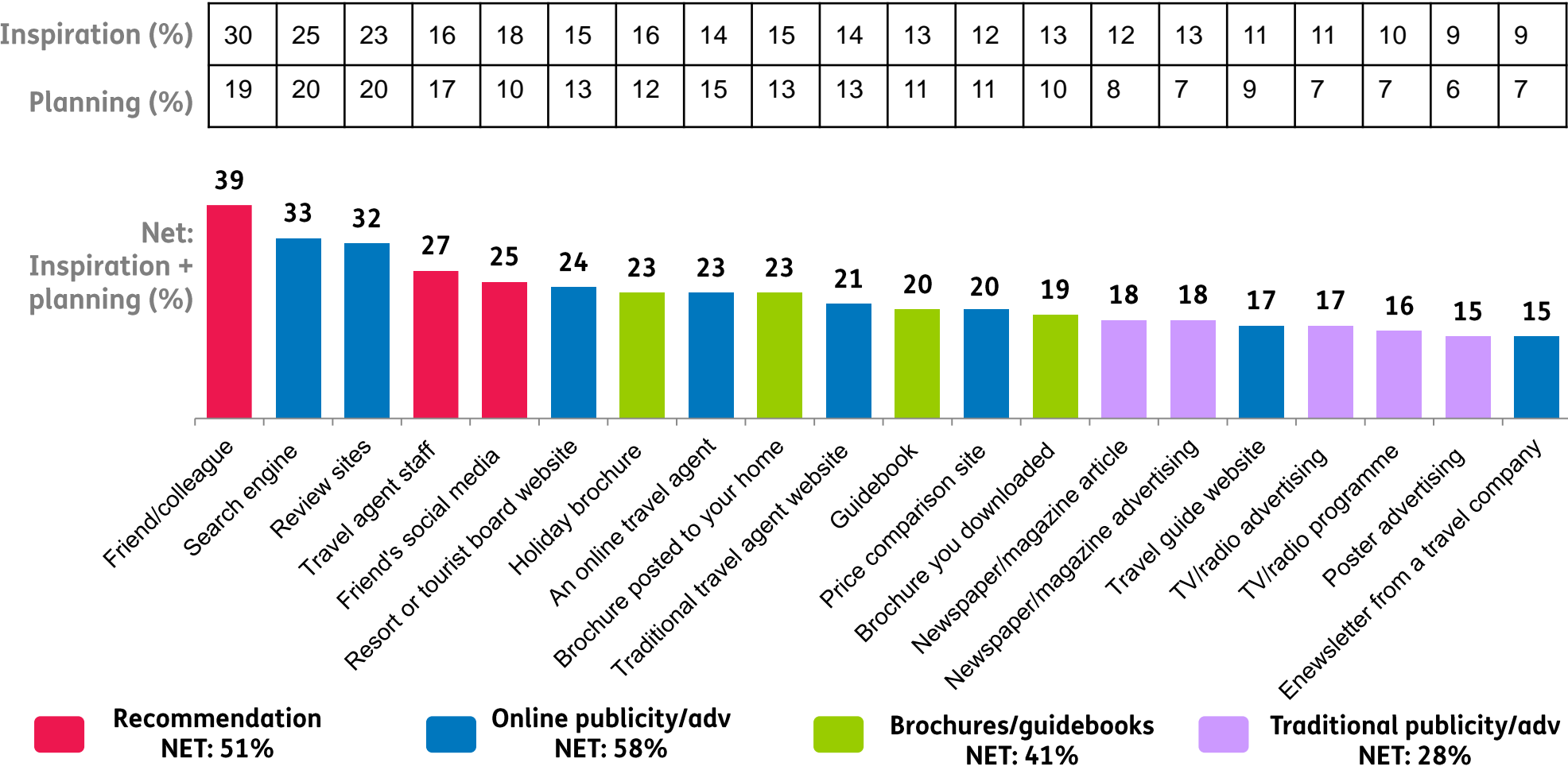
Media use for media planning (%)
(Net:: Strongly/slightly agree)



Average is 'median'

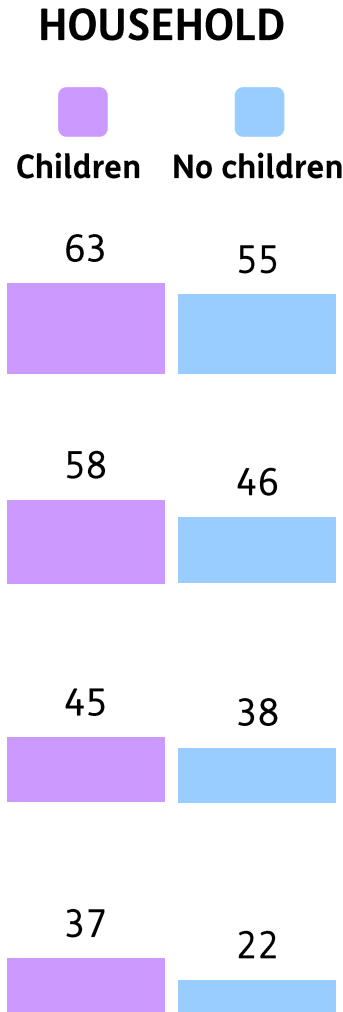
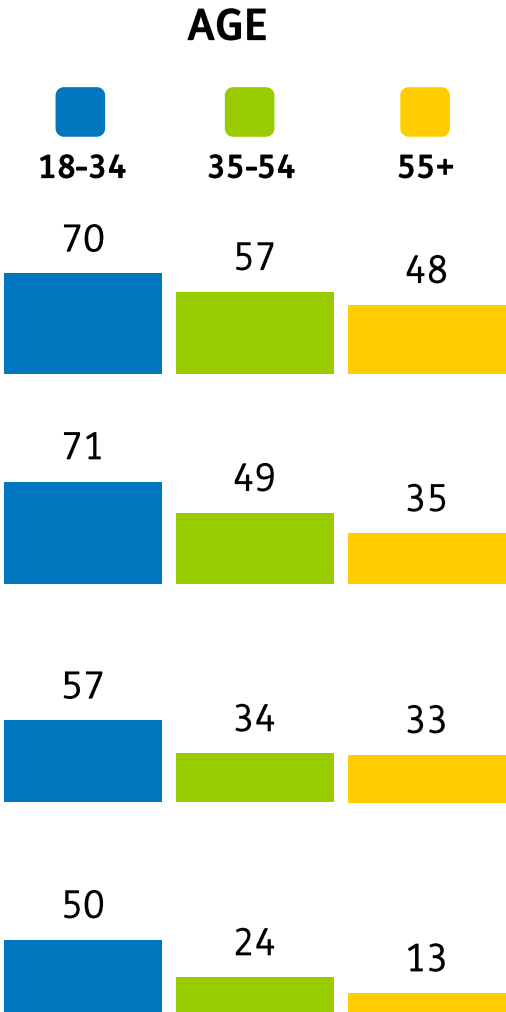
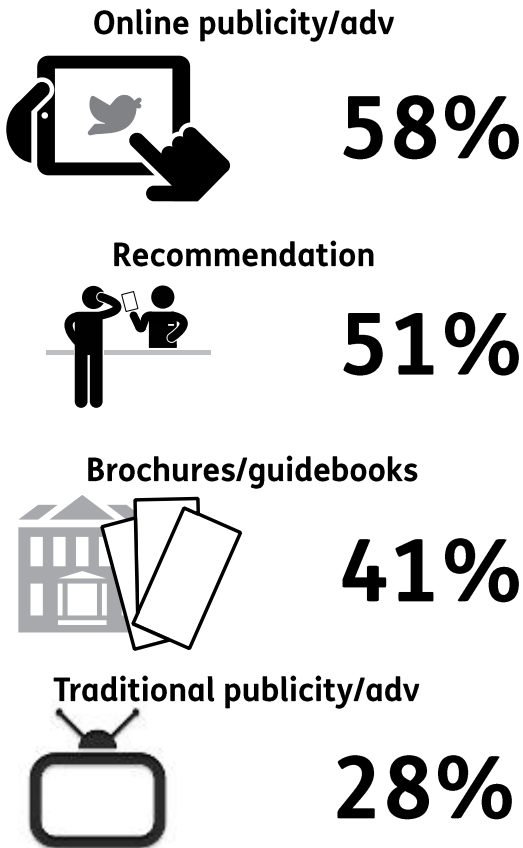
Information prompts: 4 of 5 of the most influential information sources are 'peer' or 'expert' generated

Top sources used to inspire and plan main holidays in 2015 (%)



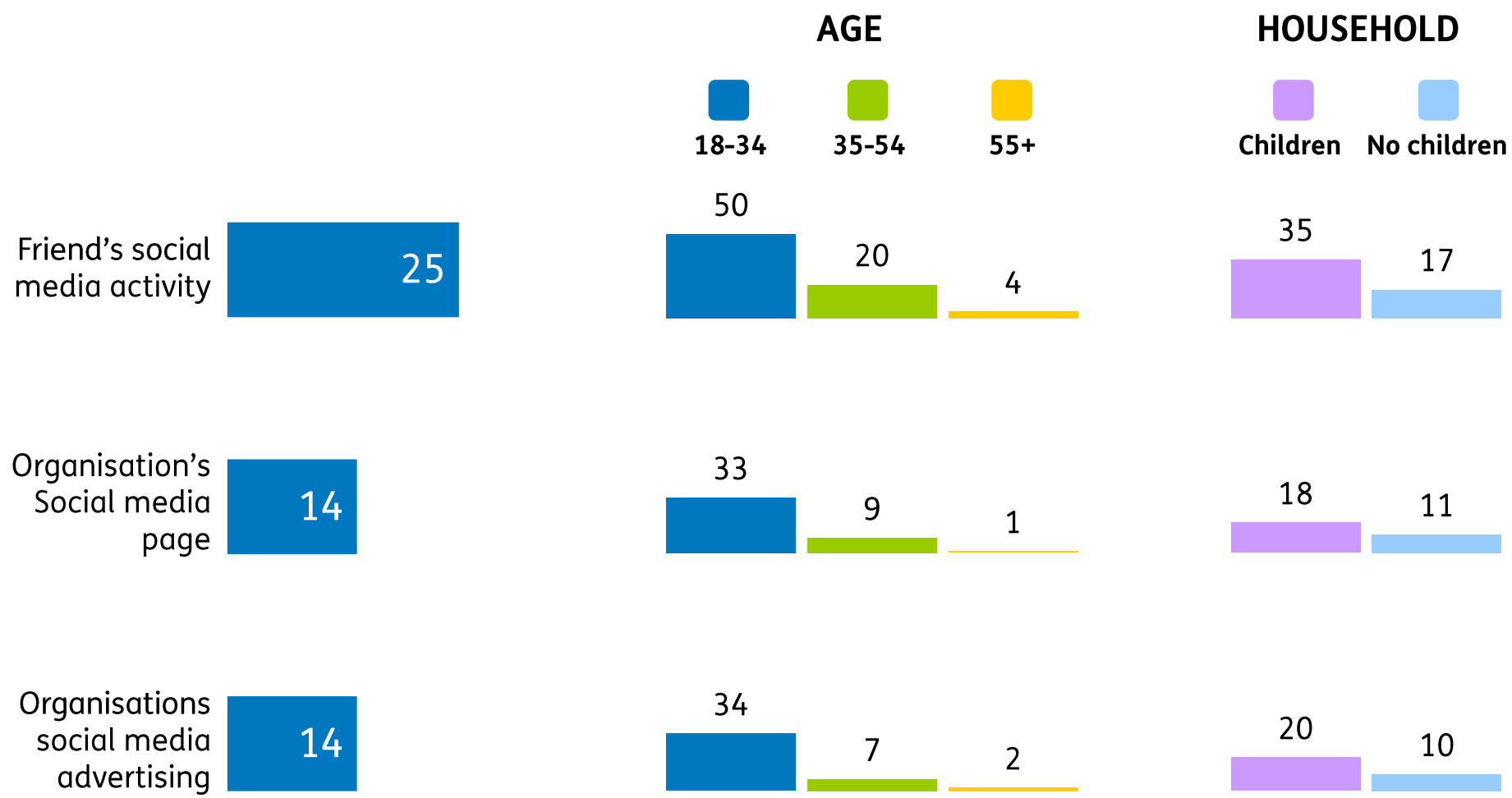
Information prompts by sub-group: 18-34s and families are more likely to be influenced by any information source

Net drivers of inspiration and planning on 2015 holiday.
Overall and by selected sub-groups (%)

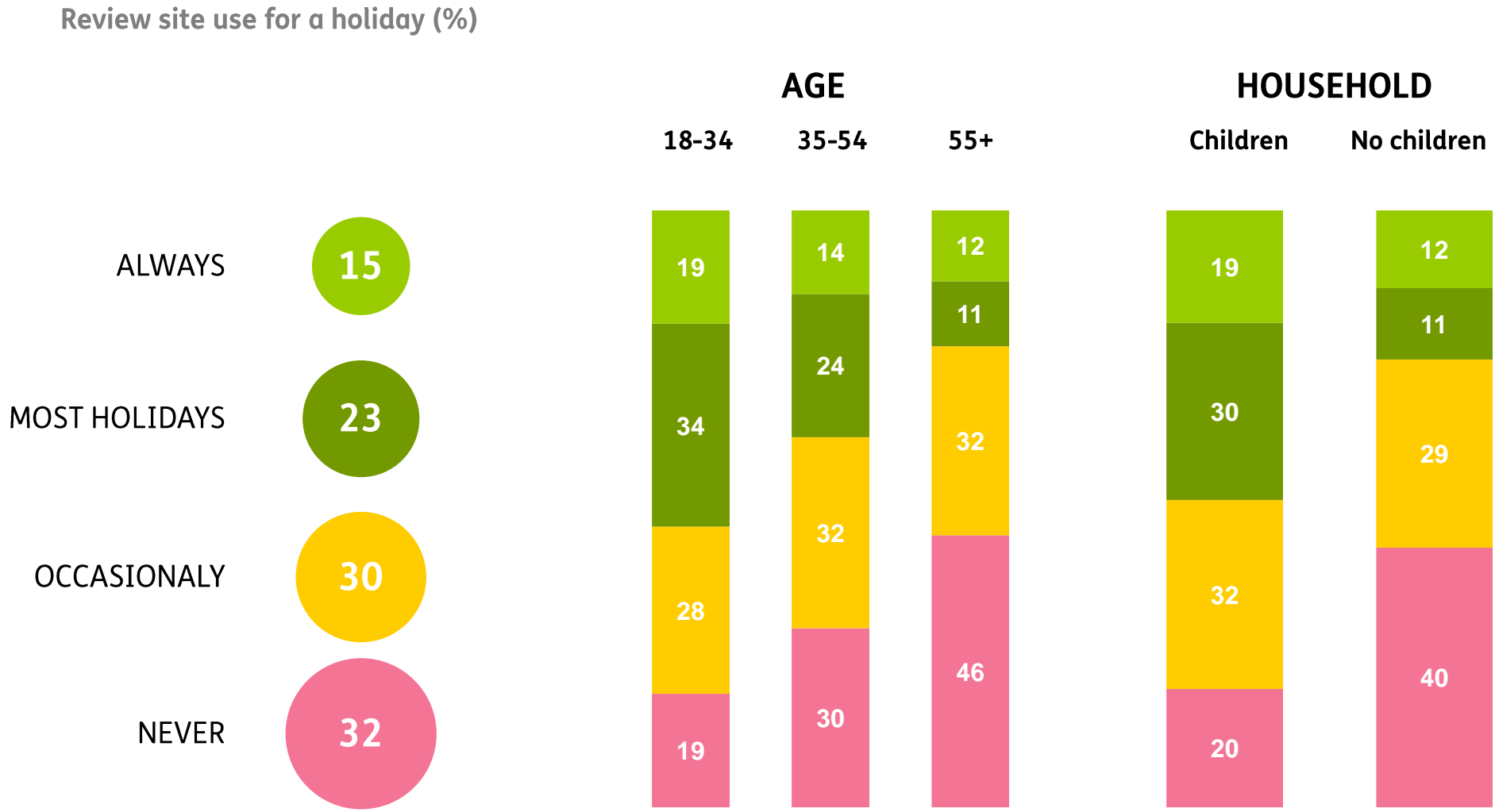


Social media influence: 18-34 year old and family engagement is even more apparent with social media

Social media as an influence on inspiring and planning 2015 holiday (%)

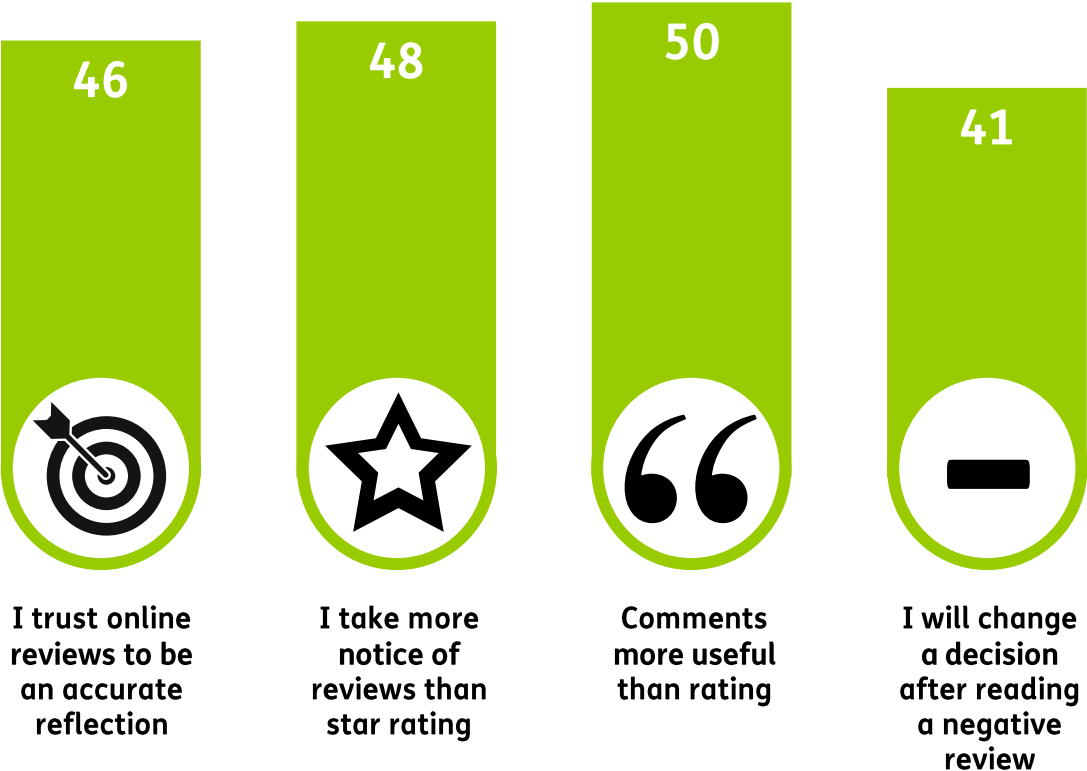


Review site use: Review sites are used for most holidays by around 2 in 5, and particularly 18-34s and families



Review site sentiment: **Around half agree that they trust review site accuracy and that they take more notice of them than star ratings**

Review site sentiment (% agree with each statement)

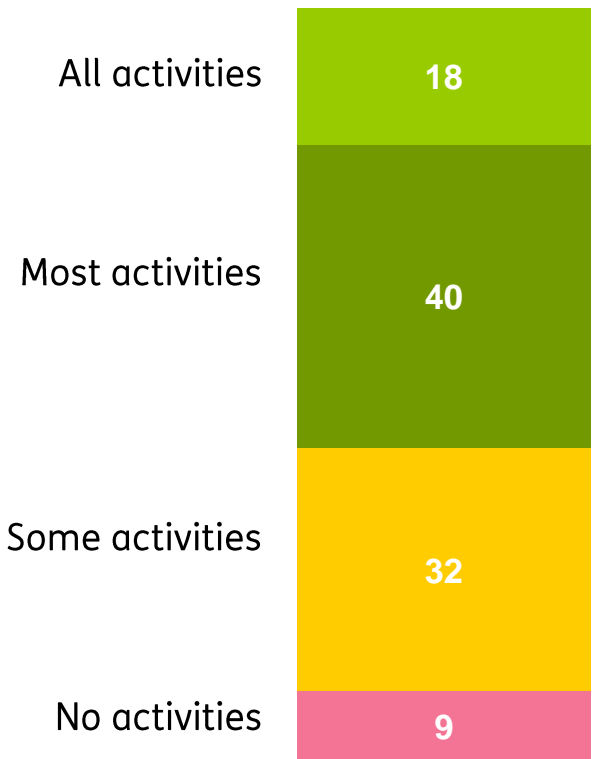


On the holiday





Holiday activity planning: The majority plan all or most of their activities before their holiday

Activities planned *before* holiday (% all taking a holiday in 2015)

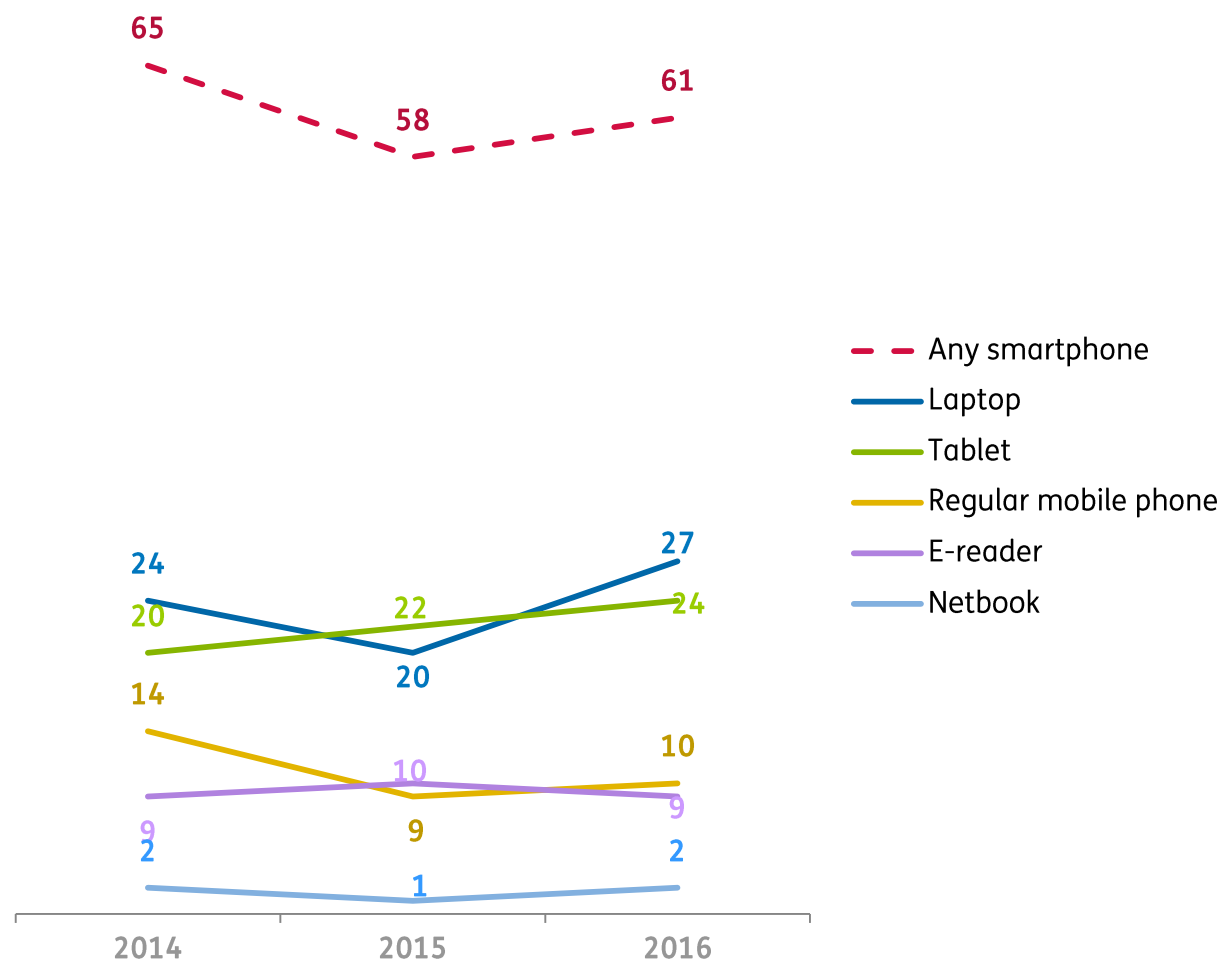


Information sources used to plan activities *on* the holiday (%)

	Leaflets at accommodation	35
	Chatting to locals	32
	Chatting to holiday makers	26
	Information from searching internet	24
	Leaflets at attraction	22
	Tourist information	20
	Advice from attraction staff	18
	Searches on social media	11
	Leaflets at transport hub	9

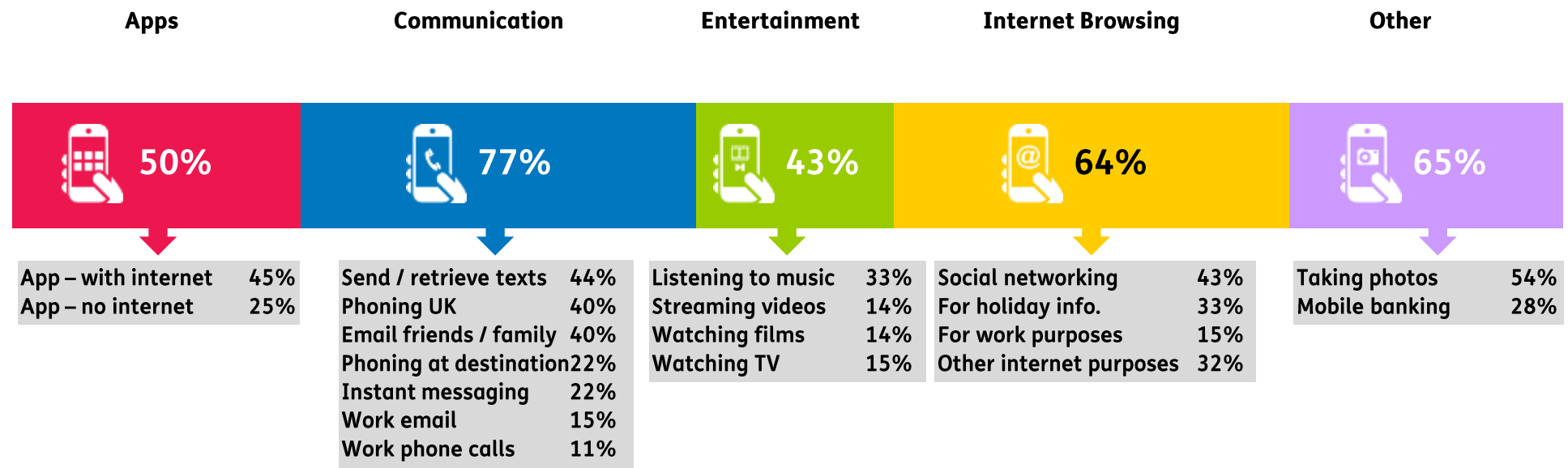
Device use on holiday: 3 in 5 Britons used a Smartphone on their holidays in 2015

Mobile devices used on last main holiday (%)



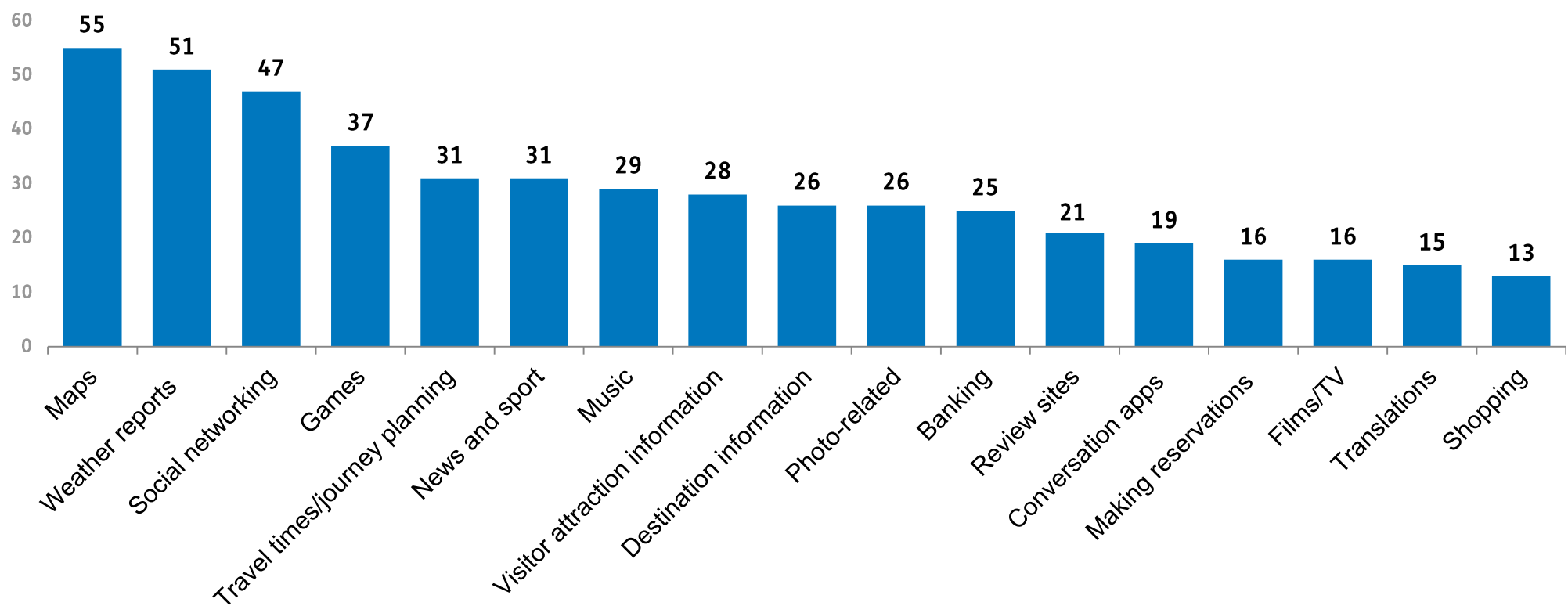
Device purpose: Taking photos is the biggest single activity conducted on a mobile device

Mobile device use: breakdown (% of all that use a mobile phone on their holiday)

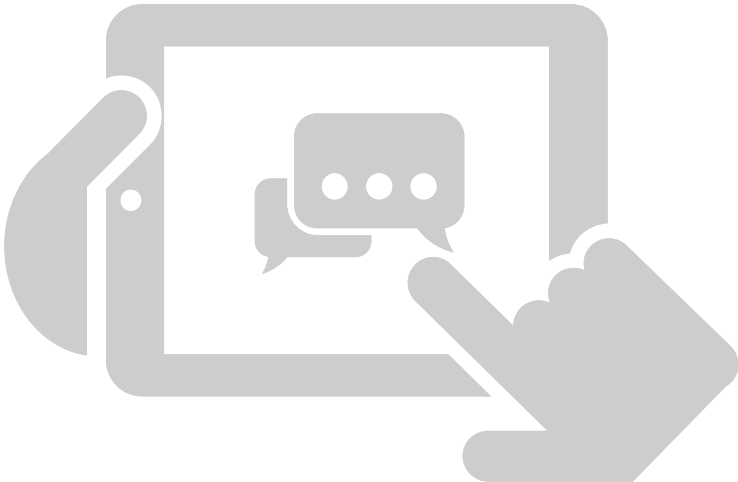


Mobile app use: Holiday-makers are most likely to use maps, weather reports and social networking apps

Mobile app usage (% of all that use apps whilst on holiday)



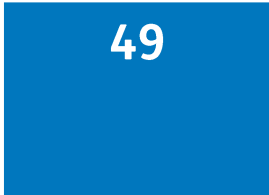
Social media use: Two thirds of British holiday-makers that use social media on holiday do so to find out what people are up to



Reason for using social media *during* holiday
(% of all that went on a holiday in 2015)



Find out what people were up to



Tell people about my holiday



To share photos of my holiday

Ways social media was used *after* holiday
(% of all that went on a holiday in 2015)



Posted a review on an online review site



Posted comments on social media site



Uploaded photos/videos onto social media sites

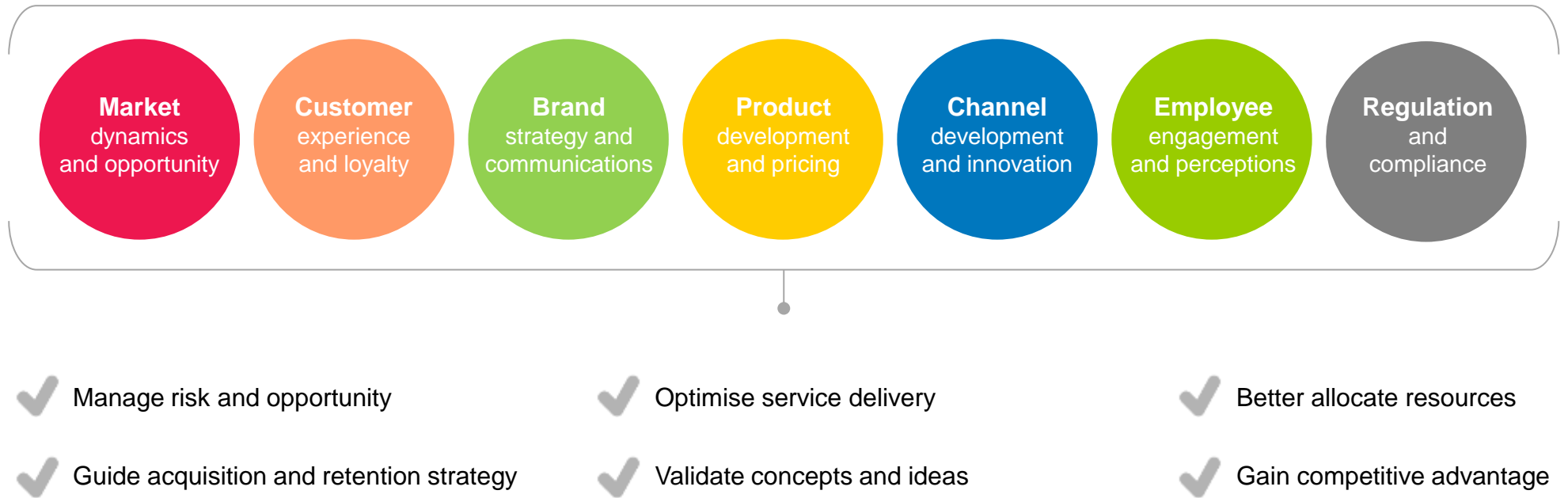
Appendix 1

Other ways we can help you



Expertise – business issues

We apply the full range of research techniques and offer a straight-talking consultative approach. Our insights and recommendations help clients make informed decisions across their organisations:



A division dedicated to hospitality, travel and leisure



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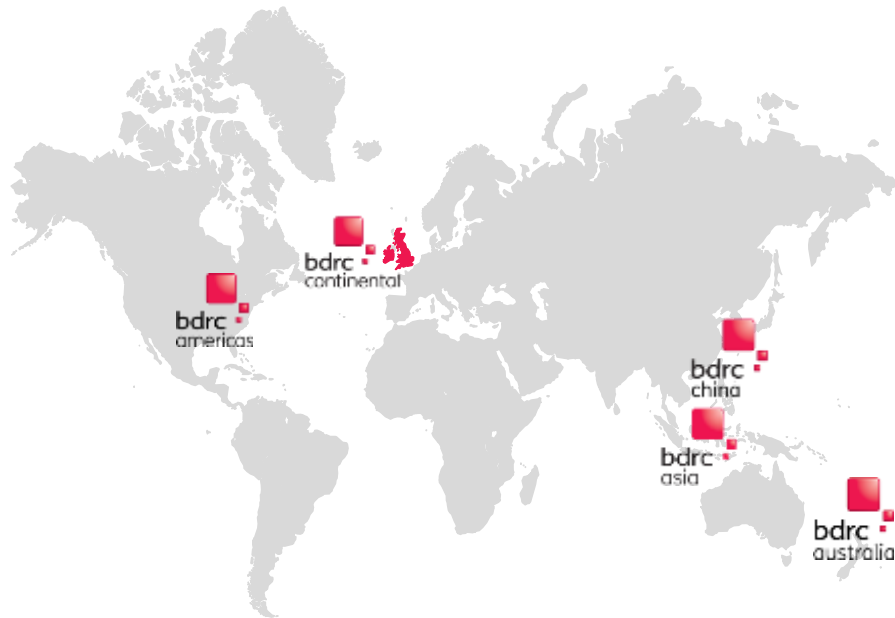


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Tim Sander, Director



Jon Young, Associate Director



Belinda Bailey, Senior DP Analyst



Utpal Ghosh, Senior DP Analyst



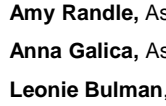
Jude Bissert, Business Development Director



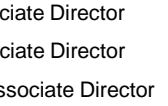
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Phoebe Wynne, Research Manager



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ALVA



Historic Royal
PALACES

The Royal Collection
Royal Palaces, Residences and Art Collection



Birmingham
MUSEUMS



Appendix 2

Extra data



Methodology

The BDRC Continental Holiday Report 2016 is based upon up-to-date primary research among a nationally representative sample of 1009 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 2016. A breakdown of demographics can be provided on request

UK country summary



Short-break 63%

Top 3 motivations

- 1 Scenery/natural beauty 41%
- 2 Visit friends/relatives 34%
- 3 See main tourist sights 33%

Top 3 months

- 1 May 18%
- 2 June 16%
- 3 July 13%

Long-break 19%

Top 3 motivations

- 1 Experience the scenery/natural beauty 39%
- 2 Visit beaches/coastal areas 31%
- 3 See the main tourist sights/places of interest 26%

Top 3 months

- 1 July 19%
- 2 June 18%
- 3 August 13%



Short-break 19%

- 1 Experience the scenery/natural beauty 51%
- 2 See the main tourist sights/places of interest 42%
- 3 Experience the local culture 34%

- 1 June 19%
- 2 May/July/August 14%
- 3 September 10%

Long-break 5%

- 1 Experience the scenery/natural beauty 56%
- 2 See less well known sights/places of interest 31%
- 3 Experience the local culture 27%

- 1 July 23%
- 2 June/August 21%
- 3 May 13%



Short-break 16%

- 1 Experience the scenery/natural beauty 49%
- 2 See the main tourist sights/places of interest 29%
- 3 Visit beaches/coastal areas 27%

- 1 May 18%
- 2 June 16%
- 3 August 14%

Long-break 3%

Top 3 motivations

Base sizes too small

Top 3 months

Base sizes too small



Short-break 5%

- 1 Experience the scenery/natural beauty 38%
- 2 See the main tourist sights/places of interest 31%
- 3 Visit beaches/coastal areas 24%

- 1 July 20%
- 2 June 18%
- 3 April 16%

Long-break 1%

Base sizes too small

Base sizes too small

Short-break intentions for 2016 (%)

UK		East & Mid Europe		Africa/Middle East		Americas		Asia Pacific	
England	63	Albania	1	Abu Dhabi	1	Argentina	1	Australia	2
Scotland	19	Azerbaijan		Algeria	1	Bahamas		Cambodia	<1
Wales	16	Bulgaria	1	Dubai	2	Brazil	1	China	1
Northern Ireland	5	Croatia	2	Egypt	1	Canada	2	Hong Kong	2
		Czech Rep	3	Israel	<1	Chile	<1	India	2
Western Europe/Mediterranean		Estonia	1	Kenya	<1	Colombia	<1	Indonesia	
Cyprus	2	Georgia	1	Mozambique	<1	Costa Rica	1	Iran	1
Denmark	2	Hungary	2	Oman	1	Cuba	1	Japan	2
Finland	1	Latvia	1	Jordan	1	Dominican Rep	<1	Laos	<1
France	16	Lithuania	1	Morocco	1	El Salvador	<1	Macao	<1
Germany	9	Montenegro	<1	Saudi Arabia	1	Guatemala	<1	Malaysia	1
Greece - mainland	3	Poland	2	South Africa	1	Jamaica	1	Maldives	1
Greek Islands	4	Romania	1	Tunisia	<1	Mexico	1	Mauritius	1
Iceland	2	Russia	2	Zimbabwe	<1	Panama	<1	Nepal	<1
Ireland	5	Serbia	1	Other Africa	<1	Peru	<1	New Zealand	1
Italy	10	Slovakia	1	Other Middle East	<1	Puerto Rico	<1	Pakistan	1
Kazakhstan	<1	Slovenia	1			Uruguay	<1	Philippines	1
Malta	1	Ukraine	1			USA - California	3	Seychelles	1
Netherlands	5	Other E./Cent Europe	<1			USA - Florida	4	Singapore	1
Norway	2					USA - other	4	South Korea	1
Portugal						Other Caribbean (e.g. St.Lucia, Barbados)	1	Sri Lanka	1
	5					Other Latin America	<1	Taiwan	<1
Spain - mainland	12							Thailand	
Spain - Balearics e.g. Majorca									1
	8								1
Spain- Canary Islands	5							Vietnam	
Sweden	1								
Switzerland	4								
Turkey	3								
Other Western Europe or Mediterranean	2								

Long-breaks intentions for 2016 (%)

UK		East & Mid Europe		Africa/Middle East		Americas		Asia Pacific	
England	19	Albania	<1	Abu Dhabi	1	Argentina	<1	Australia	2
Scotland	5	Azerbaijan	<1	Algeria	<1	Bahamas	1	Cambodia	<1
Wales	3	Bulgaria	1	Dubai	1	Brazil	1	China	1
Northern Ireland	1	Croatia	1	Egypt	1	Canada	2	Hong Kong	1
		Czech Rep	<1	Israel	<1	Chile	<1	India	2
Western Europe/Mediterranean		Estonia	<1	Kenya	<1	Colombia	<1	Indonesia	<1
Cyprus	2	Georgia	<1	Mozambique	<1	Costa Rica	1	Iran	1
Denmark	<1	Hungary	<1	Oman	<1	Cuba	1	Japan	<1
Finland	1	Latvia	<1	Jordan	<1	Dominican Rep	1	Laos	<1
France	5	Lithuania	<1	Morocco	<1	El Salvador	<1	Macao	1
Germany	3	Montenegro	<1	Saudi Arabia	1	Guatemala	1	Malaysia	1
Greece - mainland	2	Poland	1	South Africa	1	Jamaica	<1	Maldives	<1
Greek Islands	4	Romania	<1	Tunisia	<1	Mexico	<1	Mauritius	1
Iceland	1	Russia	1	Zimbabwe	<1	Panama	<1	Nepal	<1
Ireland	1	Serbia	<1	Other Africa	<1	Peru	3	New Zealand	<1
Italy	4	Slovakia	<1	Other Middle East	1	Puerto Rico	4	Pakistan	<1
Kazakhstan	<1	Slovenia	<1			Uruguay	5	Philippines	1
Malta	2	Ukraine	<1			USA - California	1	Seychelles	1
Netherlands	1	Other E./Cent Europe	<1			USA - Florida	<1	Singapore	<1
Norway	1					USA - other	<1	South Korea	<1
Portugal						Other Caribbean (e.g. St.Lucia, Barbados)	1	Sri Lanka	1
	3					Other Latin America	1	Taiwan	<1
Spain - mainland	9							Thailand	
Spain - Balearics e.g. Majorca									2
	4								
Spain- Canary Islands	7							Vietnam	<1
Sweden	1								
Switzerland	1								
Turkey	1								
Other Western Europe or Mediterranean	1								

Short-break UK destinations for 2016 (%)

Northern Ireland	3	Southern England	
Scotland		East of England	1
Scottish Highlands	9	Norfolk/Suffolk	4
Scottish Lowlands	4	Essex	1
Scottish Borders	2	Cambridgeshire	1
Edinburgh	5	South West England	2
Wales		Devon	6
North Wales	5	Cornwall	7
South Wales	4	Gloucestershire	1
West Wales/Pembrokeshire	2	Somerset	2
Northern England		Dorset	3
North East England	2	South East England	1
Durham	1	South Coast of England	2
Northumberland	2	Kent	2
North West England	2	Sussex	1
Cheshire/Chester	1	Isle of Wight	2
Lake District	7	New Forest	1
Yorkshire	4	London	8
Midlands		Other	1
West Midlands	2		
Shakespeare Country	1		
Shropshire	1		
Cotswolds	2		
East Midlands	2		
Derbyshire	2		
Lincolnshire	1		
Peak District	3		

Long-break UK destinations for 2016 (%)

Northern Ireland	1	Southern England	
Scotland		East of England	1
Scottish Highlands	5	Norfolk/Suffolk	2
Scottish Lowlands	2	Essex	1
Scottish Borders	2	Cambridgeshire	<1
Edinburgh	2	South West England	1
Wales		Devon	3
North Wales	2	Cornwall	4
South Wales	2	Gloucestershire	1
West Wales/Pembrokeshire	1	Somerset	1
Northern England		Dorset	1
North East England	1	South East England	1
Durham	1	South Coast of England	1
Northumberland	1	Kent	1
North West England	1	Sussex	<1
Cheshire/Chester	<1	Isle of Wight	1
Lake District	2	New Forest	1
Yorkshire	2	London	2
Midlands		Other	<1
West Midlands	1		
Shakespeare Country	<1		
Shropshire	<1		
Cotswolds	<1		
East Midlands	1		
Derbyshire	<1		
Lincolnshire	1		
Peak District	1		



Thank you

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