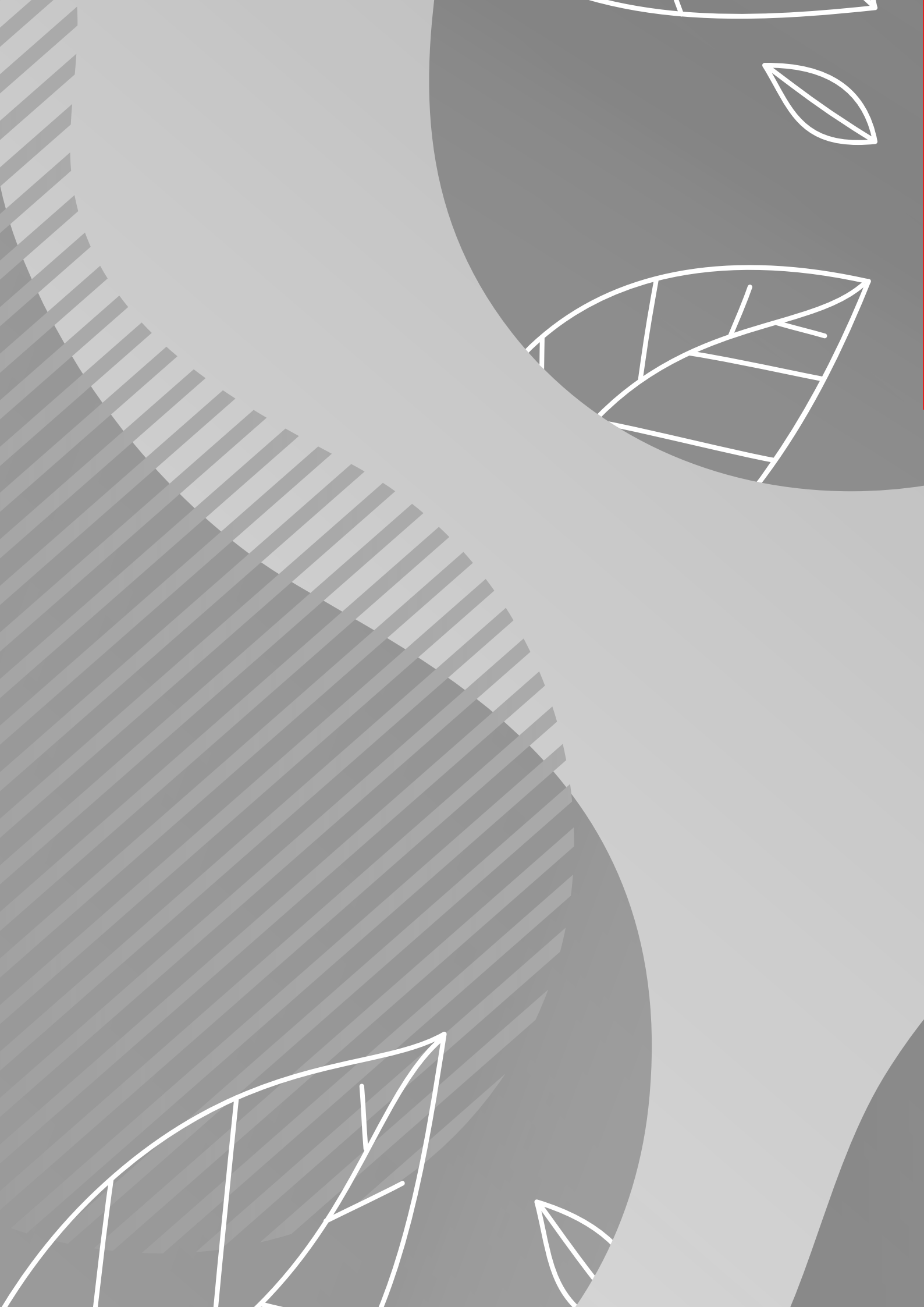
HOLIDAY TRENDS 2020



BVA BDRC



Contents

Introduction	3
Overseas Holiday Trends	5 - 11
UK Holiday Trends	12 - 17
The Sustainable Tourism Opportunity	18 - 24
Holiday Planning and Booking	25 - 29
The Changing Holiday Landscape	30 - 35
About BVA BDRC, Methodology & Report Contributors	36

Introduction

Welcome to Holiday Trends 2020 – our predictive annual report on the intentions, motivations and attitudes of the British holidaymaker.

As we publish this report, Coronavirus has brought the holiday industry to a virtual standstill.

Our fieldwork for this report was conducted at the start of January. But when Coronavirus took hold, we decided to run another wave of research to assess overall holiday intentions.

The first two chapters of this report look at Britons' overall holiday intentions, and present the data we conducted before and during the pandemic. The research we conducted in January remains useful, since it provides a baseline against which to measure the impact of the virus. It also helps us understand long-term trends in attitudes and behaviour, beyond the exceptional circumstances of the current crisis.

Elsewhere in the report, we look at issues less affected by the pandemic. We're particularly excited about our chapter on sustainability, which sheds light on a topic which has been the source of much debate in recent times. It also includes an appearance from Sir David Attenborough!

We also look at how Britons plan and book their holidays, and explain why the rise of online travel agents is set to continue. We put some numbers against solo travel, multi-generational holidays and accessible tourism in this chapter.

We hope you find this report interesting, engaging and (in the light of current events) not too depressing. As always, we're only scratching the surface of our data, so if you'd like to learn more, please get in touch!



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Overseas Holiday Trends

January's economic optimism has been undercut by a global pandemic. The rise in long haul travel will have to wait.

Note: We initially conducted this research in January 2020 before Coronavirus took hold on a global scale. Given the dramatic change in the holiday landscape as a result of the pandemic, we conducted another wave of research in late March 2020.

This section presents findings from both waves of research. Despite the overwhelming impact of Coronavirus on holiday intentions in 2020, we felt presenting both waves would give our readers the most value.

The January research remains useful in revealing the long term trends in holiday behaviour. It helps us understand which destinations are in or out of favour, without the blinding influence of a global pandemic. Through reviewing the January research we can understand the long term holiday trends that we assume will represent the general picture if normal service resumes. The January research also enables us to understand the impact of other factors that influence holiday choice – politics, safety, exchange rates and sustainability to name a few.

The March research will indicate – as much as possible – the impact of Coronavirus, at least in the short-term. It looks at how destination intentions have changed, the actions people have already taken, and perceptions on how long things will take to get back to normal.

For ease of reference, the two waves of research are presented separately.

The context in recent years

The economic crash of a decade ago led to a significant drop in overseas holidays and a surge in holidays at home. Package trips rose, as did tried and tested trips to Spain and the Mediterranean. Since then, terrorism impacted visits to London, Paris, Turkey and Tunisia, and the election of a controversial new President damaged perceptions of the USA.

Brexit had a tangible impact on holidays following the weakening of the pound. It raised the spectre of recession, as well as unthinkable queues at airports.

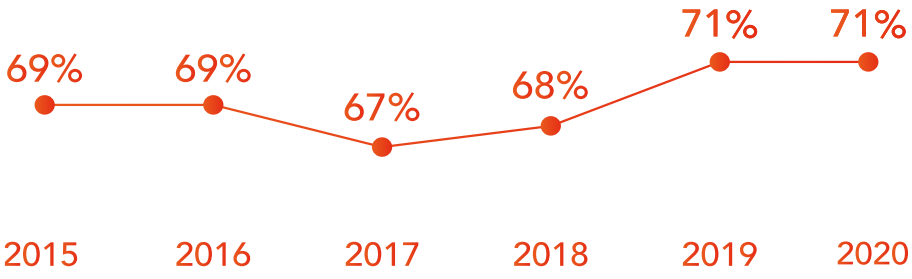
In early 2019 with the threat of a 'no deal' Brexit looming, holiday bookings were down, and it took a pre-summer surge for the numbers to bounce back. Much of the bounce back was due to discounting. Our research shows that in 2019, Britons were significantly more likely than in 2018 to take an overseas holiday because of a deal or special offer.

The outlook in January 2020

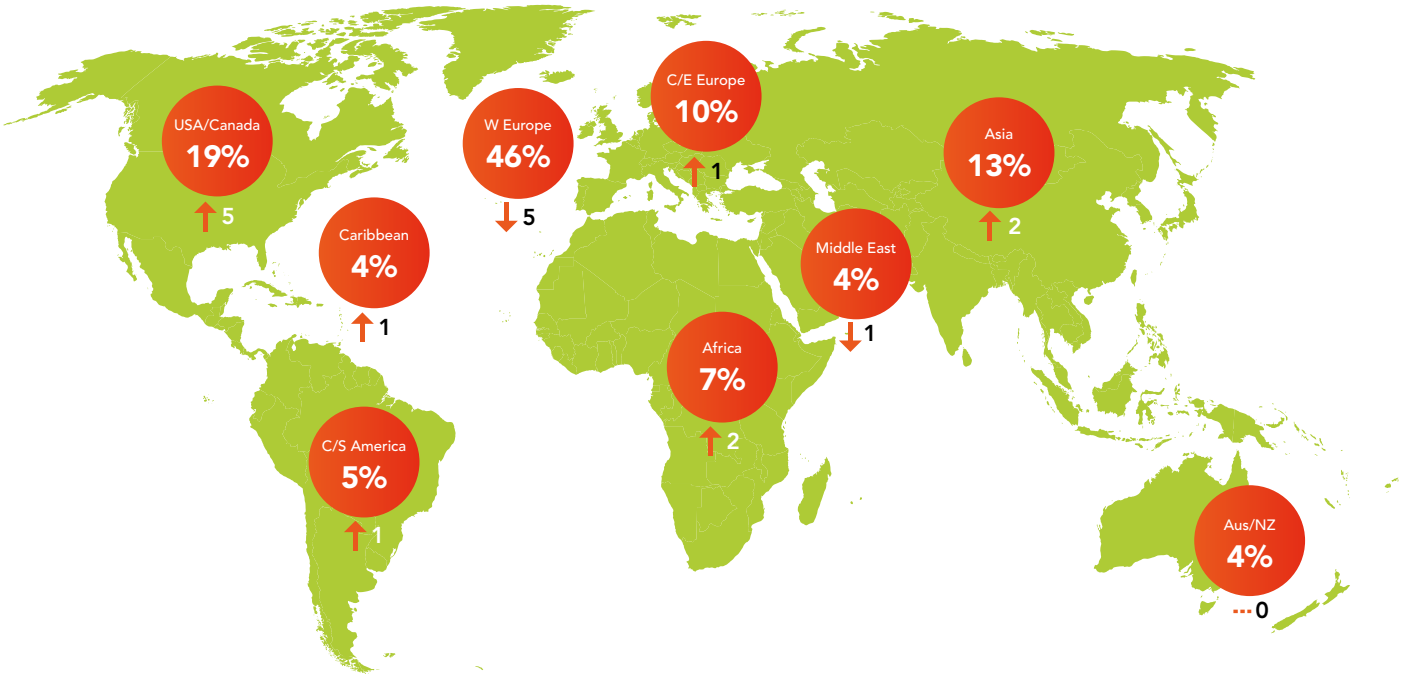
In January 2020, the mood amongst Britons was more optimistic. Unlike in 2019, Brexit was apparently 'done', and parliamentary stalemate was already a distant memory (for intentions following the Coronavirus outbreak, please see the end of this chapter).

In line with other industry data, our research indicated a drop in the proportion of Britons concerned about the economy compared to 2019. The economic optimism hadn't increased the proportion planning a trip overseas, but the percentage that had already booked their trip had increased. Furthermore, the more expensive, long haul trips were set to rise.

Proportion of Britons planning to take an overseas holiday (%)

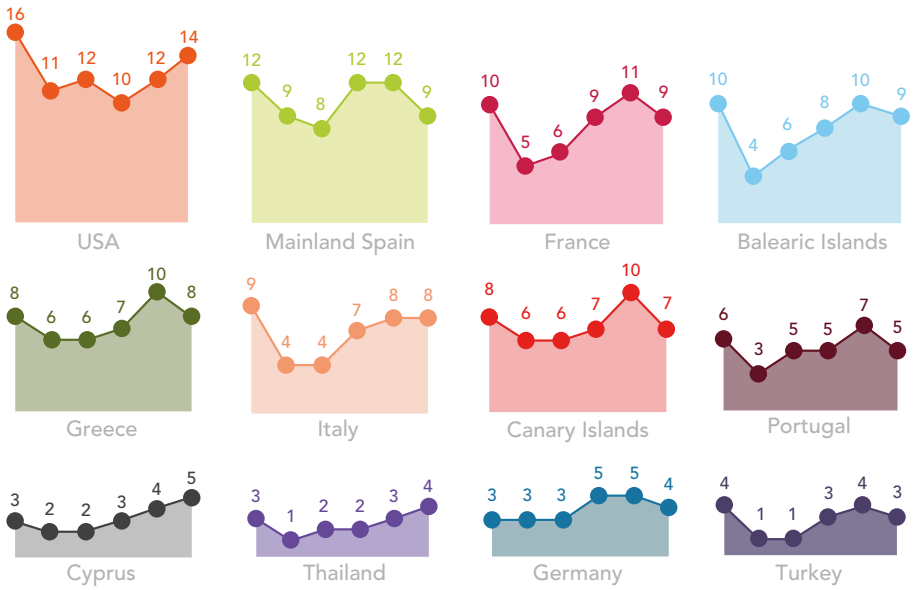


World region that visitors are seriously considering visiting for a main holiday in 2020 (% and percentage point change from 2019)



The USA was set to be the biggest beneficiary of the rise in long haul travel, in January the number one holiday destination ahead of Mainland Spain. The desire to visit Asia, South America, the Caribbean and Africa was also on the up. Trips to Western Europe and the Mediterranean looked set to drop, although destinations in these areas still made up the majority of all holidays and short breaks.

Leading destinations for a 'main holiday' of 4+ nights (%)



Although the pandemic means these intentions are certain not to convert into actual trips, the data does provide some valuable insights. The return in popularity of the USA suggests that the so-called 'Trump slump' is behind us – if it was ever a valid driver of choice in the first place (it did, after all, coincide with the weakening of the pound and US trips becoming more expensive). The rise in long haul travel suggests that despite reports of 'flight shaming' elsewhere in Europe, environmental concerns are yet to affect the holiday behaviour of the majority of Britons, although this may change in the future (we cover these issues more in the sustainability section).

> Long haul travel and especially long haul soft adventure travel will continue to rise but it has to be remembered that this is still a small part of the overseas travel market and that the perceived environmental harm caused by long haul flights may well curb this growth.

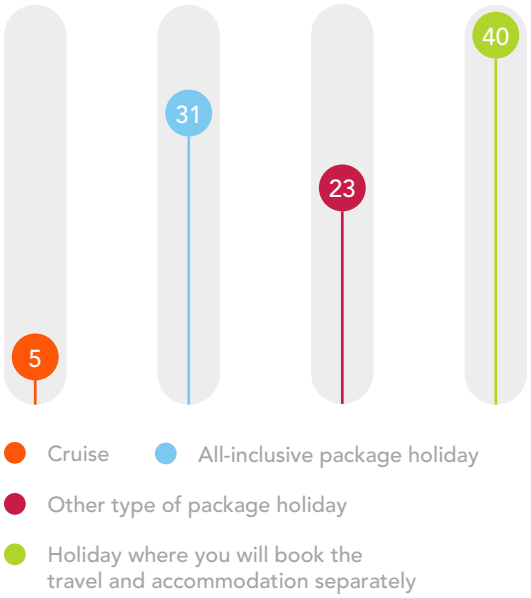
Noel Josephides, **Chairman at Sunvil and Director at AITO**

The shift to long haul holidays is perhaps linked to economic optimism, but other factors may have also played a role. The demise of Thomas Cook reduced the availability of trips to Western Europe, perhaps encouraging people to look elsewhere. It may also have resulted in a psychological shift for the many Thomas Cook 'brand loyals' who used the company year in year out.

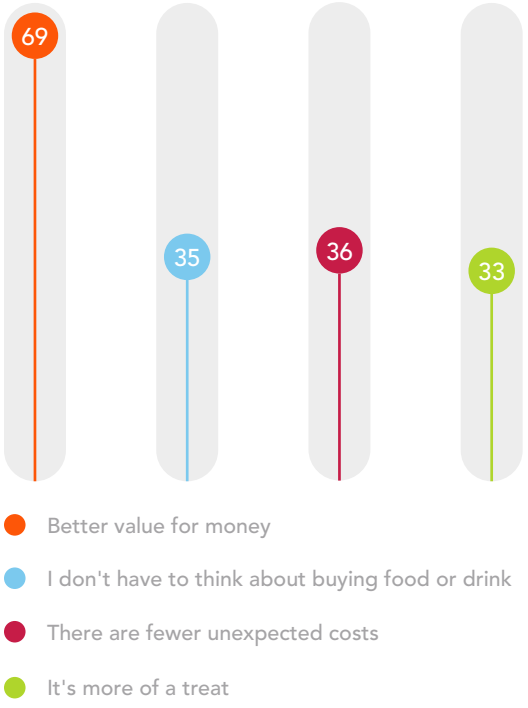
Overall, package holidays continue to make up around half of overseas main holidays, 3 in 10 all-inclusive. The movement from Western Europe to long haul destinations is most apparent amongst 'independent travellers'. The number of package trips to Western Europe have remained consistent with 2019, but trips where travel and accommodation are booked separately have dropped.

Unsurprisingly, package trips are chosen because they are regarded as good value for money and remove the spectre of unexpected costs for food and drink. For around a third they are regarded as a treat.

Anticipated type of main holiday of 4+ nights (%)

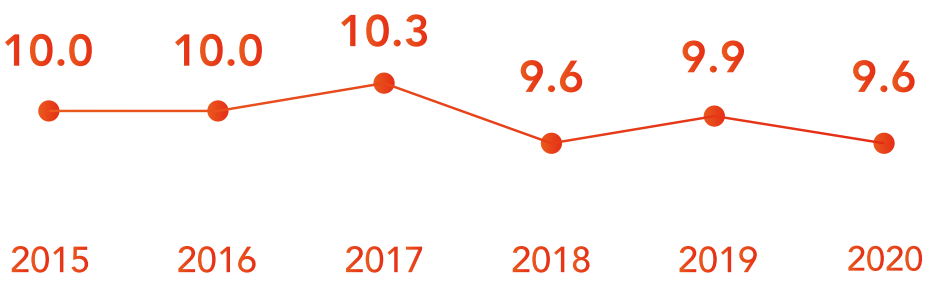


Reasons for choosing a package holiday (%)



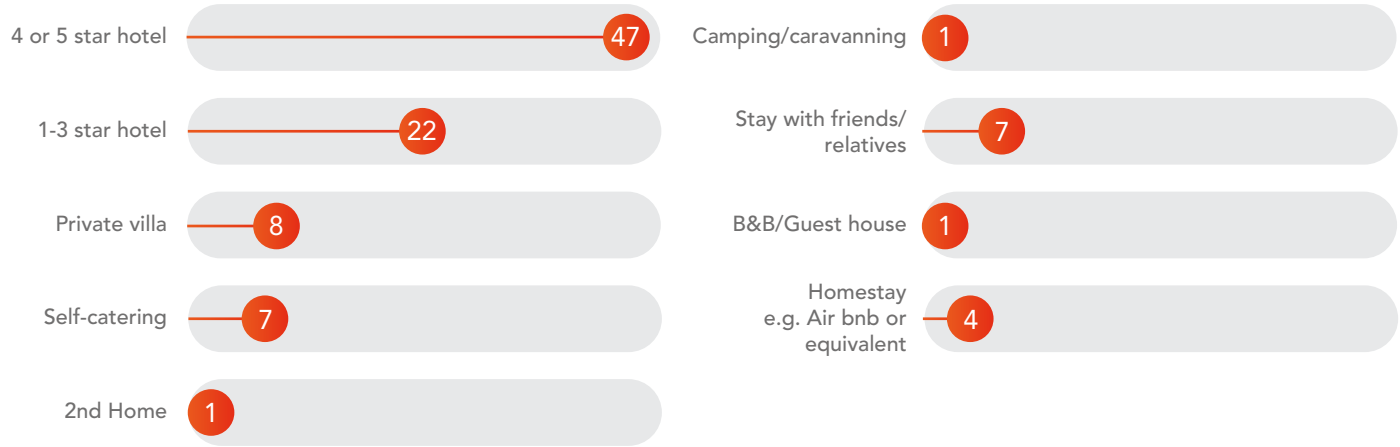
The average trip length of main holidays is just short of 10 nights, which remains consistent with previous years.

Average trip length of main overseas holiday (Mean nights)



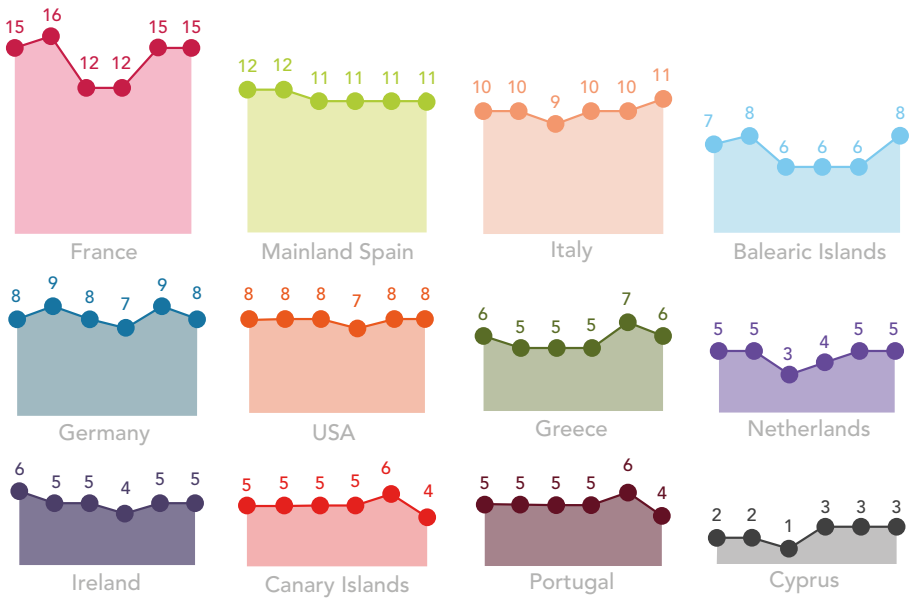
4 or 5 star hotels are the most popular types of accommodation on their overseas trip, followed by 1-3 star hotels and private villas.

Anticipated type of accommodation on overseas main holiday (%)



Short break intentions

Although we see significant movement in overseas *main holiday* destinations year on year, short break intentions remain stable. In fact, the top three destinations – France, Mainland Spain and Italy – have occupied these spaces (in the same order) for each of the last 6 years.



Destination focus

There are a number of differences in accommodation choice, trip type and booking channels by key overseas destinations. Nearly half of visitors to Mainland Spain tend to book an all-inclusive package, compared to two thirds of visitors to France who book elements of their trip independently. Visitors to France also index higher on staying with friends or family and in self-catering and private villas. Nearly half of visitors to the USA stay in 4 or 5 star accommodation.

Booking patterns differ quite significantly across destinations. Tied to a preference for all-inclusive packages, trips to Mainland Spain are most likely to be booked via an online travel agent. Visitors to France tend to book directly via the accommodation, reflecting the more independent type of traveller. Visitors to the USA index highly for bookings via a transport operator, nearly 2 in 5 falling into this category.

Patterns will differ again by type of holiday within destinations, and we'd be happy to discuss this with interested parties.

Key differences by top three main holiday destinations

		Mainland Spain	France	USA
TRIP TYPE	Short Break	11%	15%	8%
	Holiday	9%	9%	14%
LENGTH OF MAIN HOLIDAY	4-7 nights	50%	62%	22%
	8-14 nights	41%	31%	63%
	15+ nights	9%	8%	15%
TYPE OF TRIP	All inclusive package	44%	18%	23%
	Other type of package	13%	11%	27%
	Trip where travel & accommodation booked independently	36%	66%	50%
	Other	8%	4%	1%
ACCOMMODATION CHOICE	4 or 5 star hotel	39%	14%	48%
	3 star hotel or below	20%	23%	20%
	Self catering or private villa	18%	24%	20%
	Camping or caravanning	2%	8%	0%
	Stay with friends or relatives	13%	20%	4%
	Homestay	2%	8%	7%
	Other	5%	4%	1%
TRIP BOOKING	2 months in advance	28%	30%	21%
	3-6 months in advance	63%	50%	51%
	7+ months in advance	9%	16%	25%
BOOKING CHANNEL	Directly with accommodation	23%	52%	33%
	Directly with transport provider	24%	27%	39%
	Retail store of travel agent	9%	7%	20%
	Website of a travel agency	16%	10%	16%
	Through an OTA (e.g. Booking.com)	39%	25%	23%
	Via a homestay website	4%	4%	4%
	Other	9%	3%	4%

The Impact of Coronavirus on overseas holidays

In late March we conducted another wave of Holiday Trends research to understand the impact Coronavirus would have on overseas trips for the rest of the year.

In January, 71% of Britons stated they were planning on taking a trip overseas. In March, 41% of all Britons had either cancelled or expected to cancel their trips – 33% a holiday of 4+ nights and 14% a short break.

Proportion of Britons that have cancelled or expect to cancel an overseas trip (%)



Our follow-up research suggests that traditional holiday destinations will be hit the hardest. North America is set to experience 32% fewer visits than predicted in January this year. Western Europe and the Mediterranean is set to experience 11% fewer visitors than predicted in January, and 20% fewer than in 2019. We may see some substitution of destination choice as a result of the pandemic. If overseas travel becomes a possibility, shorter planning times may push up short-haul travel, and financial challenges may make cheaper destinations more appealing. Turkey and Tunisia, for example, may increase in popularity.

The main movements in holiday intention as a result of Coronavirus

Western Europe & the Mediterranean

11% decline on January 2020

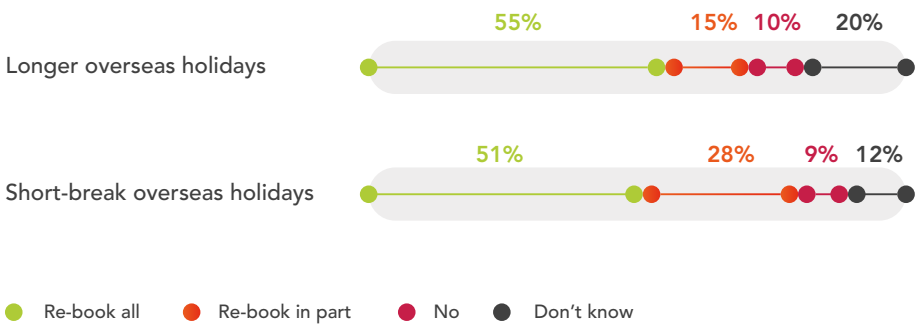
20% decline on January 2019

North America

32% decline on intentions in January 2020

There is, however, some evidence of a potential rebound in visits. 7 in 10 of those that have cancelled their longer overseas trips intend to re-book their overseas holidays and 8 in 10 their overseas short-breaks when travel advice returns to normal.

Intention to book / re-book cancelled planned holidays when travel advice returns to 'normal' (%)



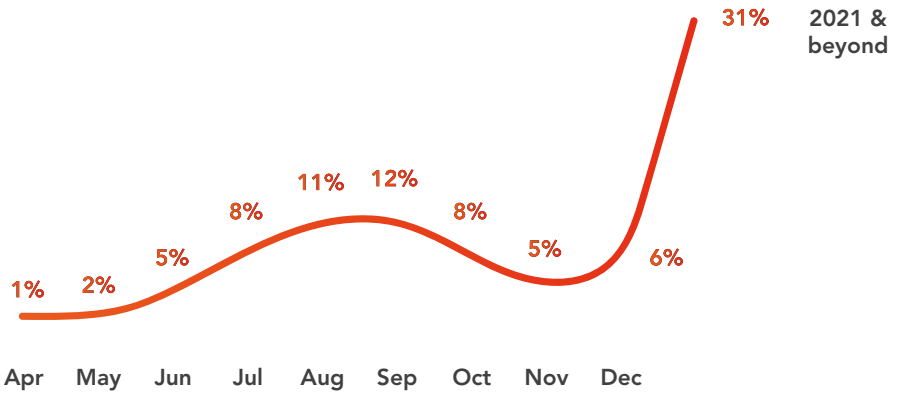
Only 17% of Britons expect holiday 'normal' to happen before August, and only 40% before October. Worryingly, around a third don't anticipate normalisation before 2021 or beyond. Around 1 in 5 state they won't travel until a vaccine is found.

The current lockdown makes short-term travel impossible, but this pessimism suggests medium term and long term travel may be impacted too. With a damaged economy and minimal hope of normal service returning in the next 6 months, Britons are unlikely to book trips even if they aren't set to happen until the end of the year. The tourism industry will be hoping the UK government does all it can to bring 'normal' back sooner rather than later.

However, it takes a lot for Britons to turn their back on trips abroad. 63% of Britons are still seriously considering a holiday or short break overseas in the next 12 months. Although 63% is the lowest intention in 6 years of Holiday Trends, it does suggest there is some hope, should overseas travel become possible.

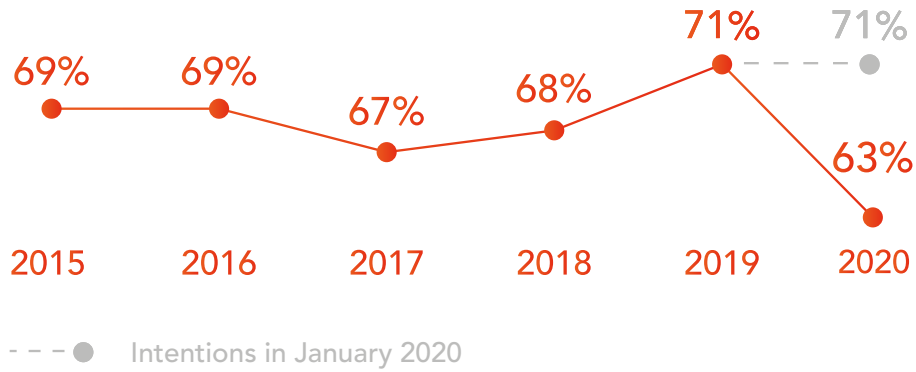
Financial incentives may also help turn consideration into reality. The rush of last minute summer bookings in 2019 after a hard Brexit was avoided is one example of this happening. In 2016, our research demonstrated that people would overcome fears of visiting terrorist-hit destinations if there were significant discounts to tempt them. Easyjet, who have launched their winter sale early this year, will hope this holds true for pandemics.

Perceptions of when holiday will return to 'normal'?



n.b. 10% don't know / wouldn't answer

Proportion of Britons planning on a trip overseas this year (FOLLOWING COVID 19) (%)



As argued by Noel Josephides of Sunvil, the collapse of Thomas Cook highlighted the vulnerability of tour operators before the pandemic. In the current circumstances, it's difficult to imagine that there won't be some casualties by the end of 2020. One key step that would reassure potential holiday makers is the development of treatment or a vaccine for the virus. In fact, our weekly COVID-19 sentiment tracker demonstrates that around 1 in 4 of Britons will not book an overseas holiday before either are established.

> The collapse of Thomas Cook had severe repercussions on the UK travel industry, with considerable losses and several collapses. However, by the end of 2019, Jet2, TUI and easyJet had more than replaced the volume of flights, signalling that tour operators and airlines had learned little from the overcapacity which had, in part, caused the collapse of Thomas Cook.

Noel Josephides, Chairman at Sunvil and Director at AITO

For an evolving picture of the impact of Coronavirus on the nations' leisure behaviour, download our free weekly report here.

UK Holiday Trends

Domestic trips remain popular, but fears over Coronavirus mean UK tourism is unlikely to benefit in 2020.

As in the preceding overseas holiday chapter, we have split this chapter into two sections – research conducted in January and research conducted at the end of March.

The context in recent years

The proportion of Britons planning a holiday or short-break in the UK has been consistent for the last half decade at three quarters of the population. This trend is driven by a relatively consistent proportion of people intending to take a *short-break* during this time.

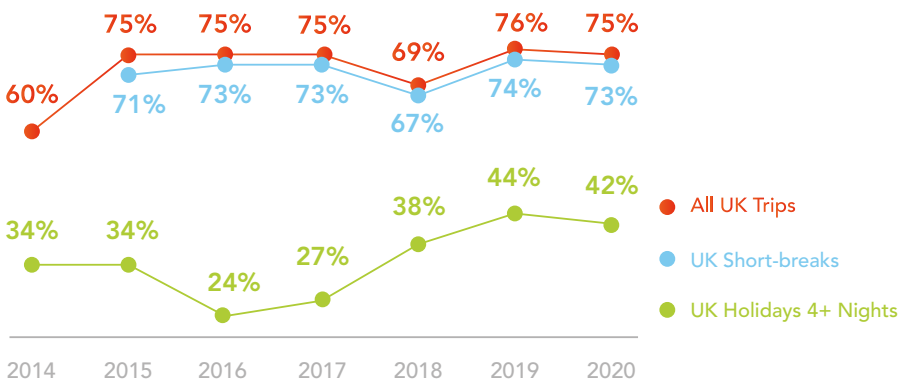
The outlook in January 2020

The most interesting trend around UK domestic tourism in recent years has been the continual increase in Britons intent on taking holidays of 4+ nights. After a drop in 2016, the proportion intending to take a long-break at home had increased for three consecutive years, peaking at 44% in 2019. 2020 is the first year since 2016 that long breaks aren't set to increase, but at 42% it is still higher than any of the four previous years. Coronavirus may push that proportion up again, as Britons substitute longer holidays abroad for trips at home.

This means that, although the proportion of Britons taking an overnight trip at home has not changed over this time, the proportion intending to take both a short break *and* a longer holiday has increased significantly. If these intentions are converted into actual behaviour, the rise represents a significant jump in the number of nights and spend on domestic trips over this period.

Of course, our research only measures holiday intentions. With the recent uncertainty around Brexit and exchange rates, it's possible that Britons have simply been keeping their options open in January, before eventually booking an overseas break in the summer. Coronavirus will also impact these figures. A prolonged lockdown may wipe out longer domestic trips this season. Conversely, lifting the lockdown before the summer may mean Britons extend their UK short breaks, or take longer trips in the UK instead of planned trips overseas.

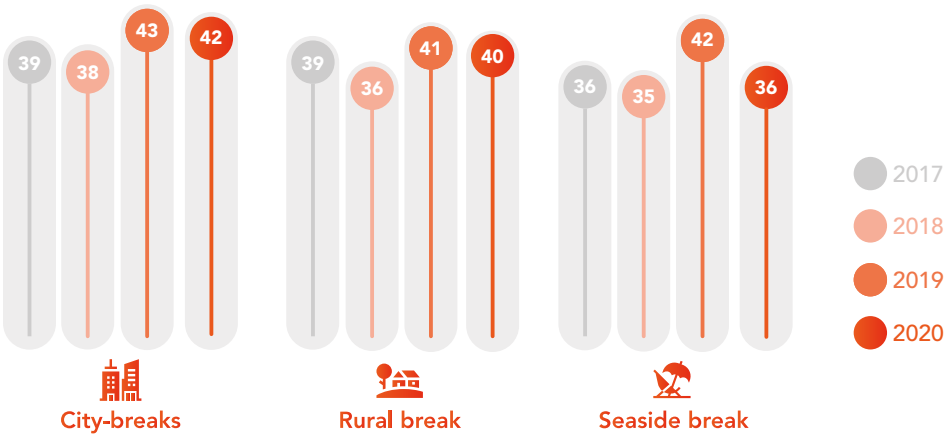
Planned UK holidays this year (%)



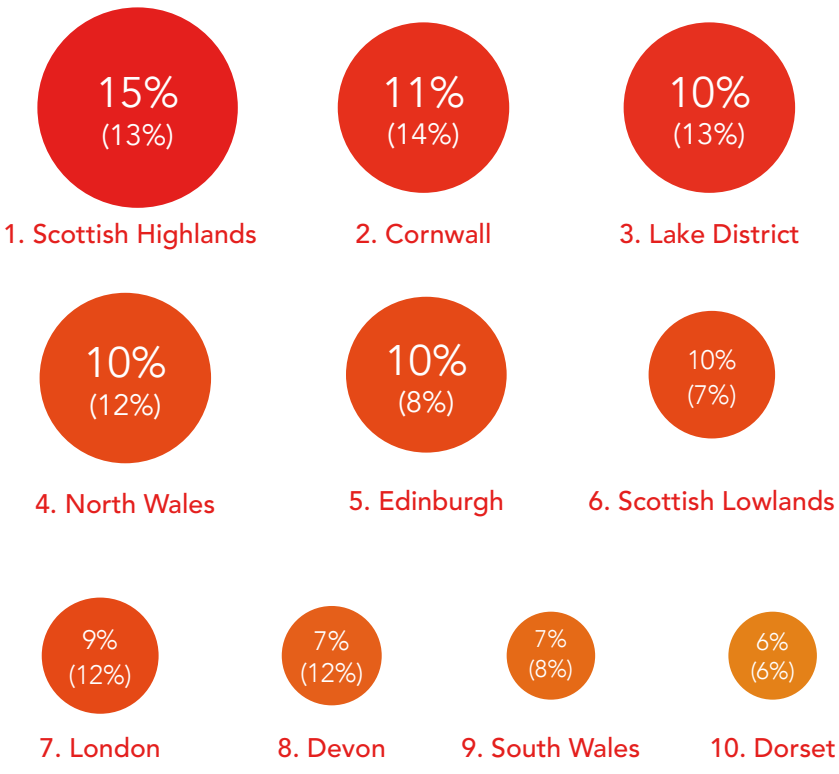
Although overall trends are consistent with 2019, there has been some movement in the types of domestic destinations that Britons plan to visit. In January this year, seaside breaks were of less appeal than in 2019 – intentions to visit Cornwall and Devon both significantly down. However, despite the drop this year, the seaside trend over the long term remains consistent. This suggests that last year's jump in popularity may have been a one-off – a Brexit-induced fear of Western European beaches being off limits.

Rural destinations remain popular. Scotland is a big beneficiary, with the desire to visit the Scottish Lowlands and Highlands each increasing.

Type of anticipated UK holiday (%)



Top destinations for a UK holiday or short break in 2020 (% all Britons, 2019 figure in brackets)

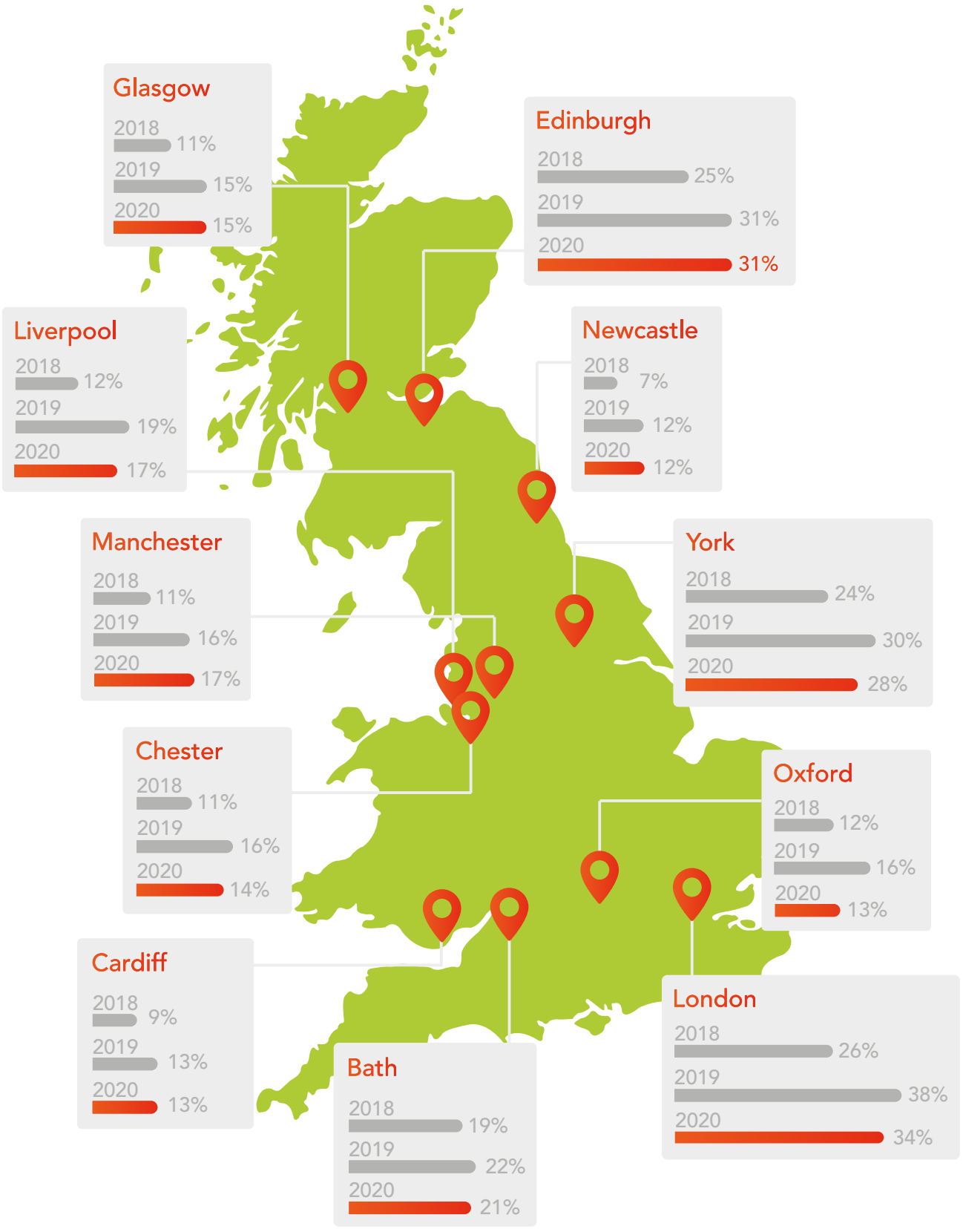




Domestic city/town breaks

London retains its place as the most popular city break destination ahead of Edinburgh and York. There was a slight drop in interest to visit London, although intention to visit remains significantly higher than in 2018 (after the terrorist attacks of 2017).

Anticipated city/town break destinations in next 2 years



Domestic trips to the UK coast

The drop in intended visits to the UK coastline appears to have been driven by traditional resorts and harbour towns. Intentions to visit small seaside towns remain stable, whilst for the second year running the intention to visit non-urban coastal destinations has increased. Non-urban coastal destinations may represent an area of growth for the coastal economy.

Chart showing coast holiday preference and direction of travel

	2017	2018	2019	2020
Traditional resorts	13%	20%	26%	20%
Harbour towns	12%	10%	14%	11%
Small seaside towns	18%	17%	21%	20%
Non-urban coastal destinations	9%	6%	17%	19%

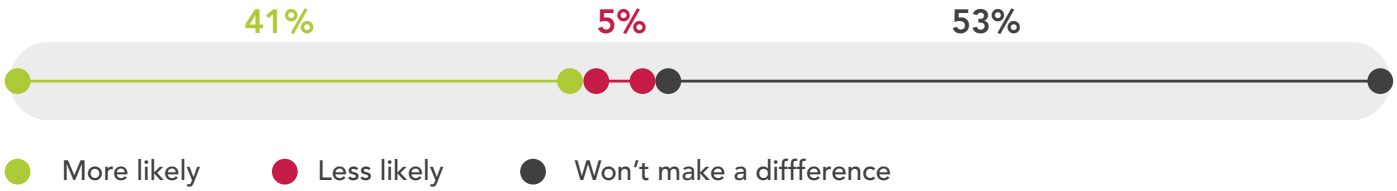
Despite a drop this year, there is evidence to suggest that the appeal of the UK coastal holiday will increase next year. 2021 is *The Year of the English Coast*, and will mark the opening of the England Coast Path National Trail – the longest waymarked walking route in the world (see englandscoast.com for more information).

In addition to the walking route, the year will also be marked by a full events programme.

1 in 4 Britons are aware that the trail will open, and 2 in 5 stated that the events programme will make them more likely to visit the English coast.

Visit Wales' celebration of *The Year of Outdoors* supported by Eve Myles and Luke Evans, and Wales' *existing* coastal path, will no doubt increase the appeal of coastal trips across the Severn Bridge too.

Likelihood to visit the English Coast if there was an event (%)



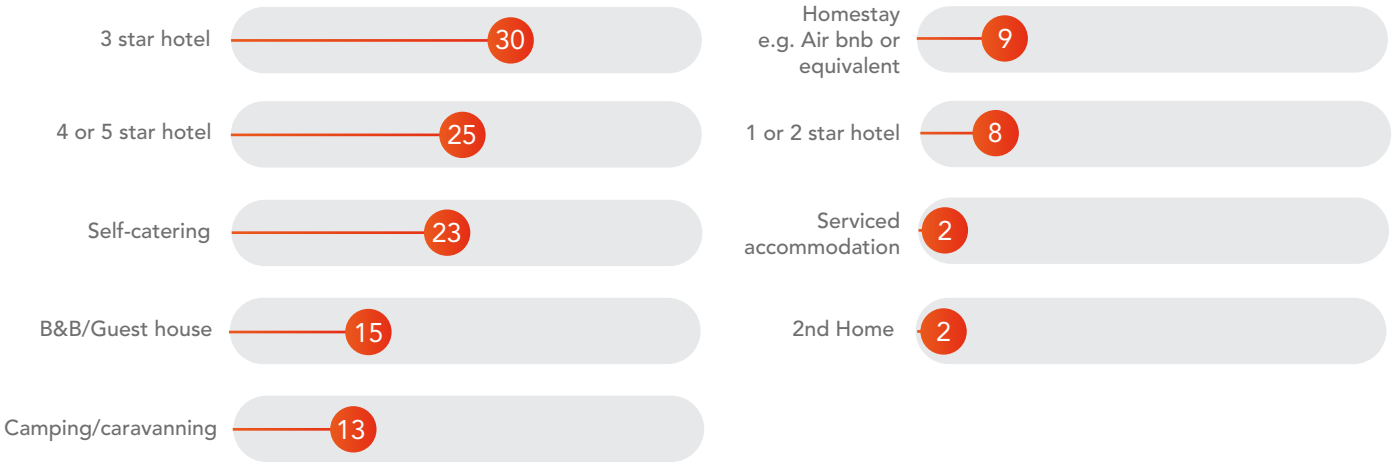
> In 2021, the entire length of the English coast will be made accessible for the first time through the creation of a new permanent public right of access - the England Coast Path National Trail. This provides the timely opportunity to reflect on and celebrate our amazing coastline, its people and environment. It is even more timely now as we all need to reconnect with nature and the sea. Year of the Coast presents an opportunity for the tourism industry along the coast to restart and provides a positive focus during the current crisis. It's also an opportunity to re-imagine how we engage with tourists and the environment and raise awareness of the coast.

Samantha Richardson, Academy Director at the National Coastal Tourism Academy

Domestic accommodation

3 star hotels are the most popular types of accommodation for a UK trip, followed by 4 or 5 star hotels and self-catering accommodation. A notable 1 in 11 intend to stay in 'Homestay' accommodation on their domestic trip in 2020.

Anticipated type of accommodation on UK holidays (%)



The Impact of Coronavirus on UK tourism

At the start of the year 75% of Britons were planning a UK short break or holiday in 2020. However, as of late March, 33% of the population had cancelled or expected to cancel these trips. Similar proportions had cancelled a short break (20%) and a longer holiday (18%). They were marginally more likely to have cancelled a short break.

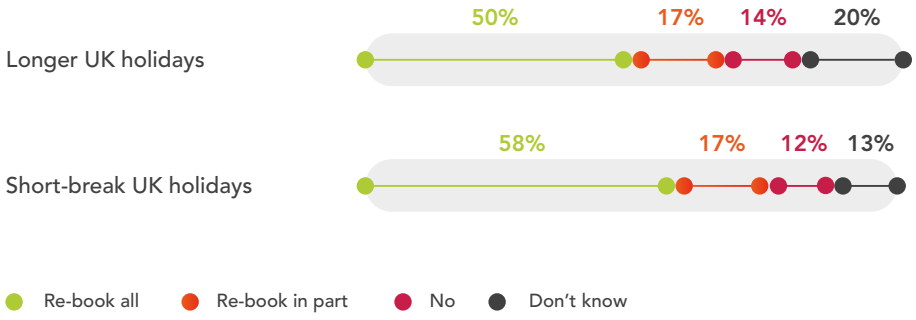
Proportion of Britons that have cancelled or expect to cancel an overseas trip (%)



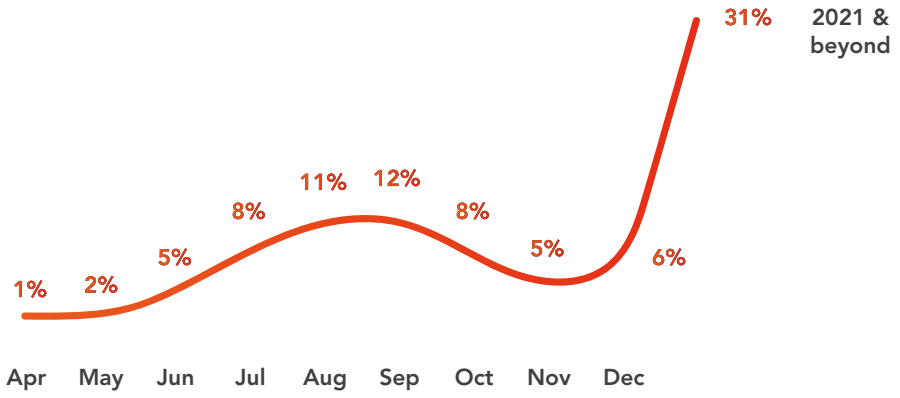
Whilst a third of Britons cancelling domestic trips does not make positive reading, this is lower than cancellation rates for overseas trips (41%). The difference is intuitive – UK trips tend to be booked closer to the trip date, so are likely to be cancelled closer to the date too. Moreover, UK trips do not carry the concerns of airlines going into administration, or the uncertainty of getting past border control. It is still possible to travel across the UK. So cancelling may be seen as less of a priority or necessity.

Positively, the vast majority of the 33% that have cancelled their UK trips intend to book part or all of them when things return to normal. However, as outlined below and in the overseas chapter, Britons are not hopeful that normality will return soon – only a minority thinking it will be before the summer. But when it does return, it's logical that normalisation will apply to domestic travel before overseas travel. Our weekly COVID-19 sentiment tracker demonstrates that Britons are more likely to book a UK trip than an overseas trip before a vaccine or cure for the virus is developed. On this basis there is a likelihood that the UK tourism industry will be more resilient to the pandemic in the short term, and may even benefit in the medium term.

Intention to book / rebook cancelled planned holidays when travel advice returns to 'normal' (%)



Perceptions of when holiday will return to 'normal'?



n.b. 10% don't know / wouldn't answer

A further concern for domestic tourism is that Britons will avoid city breaks or trips to other crowded areas when the lockdown is removed. Although all travel may be tentative at first, there is limited evidence of this concern becoming a reality.

When asked the cities and towns they are likely to visit in the next two years, the appeal of London, Edinburgh and York remains as high or higher than in January this year. Two years is of course far enough away for the most pessimistic Briton to expect normality to return, but if there was a notable aversion towards these destinations, we would still expect to see some drops, and not increases. Perhaps after weeks of social distancing, Britons are looking forward to being amongst other people.

	Jan 2020	March 2020
London	34%	39%
Edinburgh	31%	30%
York	28%	28%
Bath	21%	23%
Liverpool	17%	21%
Oxford	13%	16%

	Jan 2020	March 2020
Manchester	17%	22%
Chester	14%	12%
Glasgow	15%	16%
Cardiff	13%	14%
Newcastle	12%	10%

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The Sustainable Tourism Opportunity

Britons are concerned about the environment and will make small sacrifices with their holidays to help

According to the World Tourism Organisation, 1.5 billion international tourist arrivals were recorded in 2019, a 4% increase on the previous year. Coronavirus may inhibit a rise in 2020, but the long term forecast is for continued growth.

Higher international tourism will translate into more flights and increased energy use, leading to more CO2 in the atmosphere. An increase in international tourism will probably increase over-crowding at honey pot destinations as well as sea pollution.

But do people actually care?

There is lots of commentary around what the tourism industry can or should do to reduce its impact on the environment. We are not experts in the practicalities of sustainability. Instead our focus is on what the general public think about it. Regardless of how well-meaning tourism organisations are, it is market forces that will influence commercial operators. So understanding what people think is essential to driving any change.

Each year we ask Britons to tell us the important influences on their last holiday choice. In 2020, 'sustainable standards at a destination' was ranked 25th out of 29 possible influences, a position it has held solidly for the past 4 years.

Top oversea holiday motivations

1	Weather
2	Price of the holiday
3	Safety
4	Scenery & Landscape
5	Friendly people
25	**SUSTAINABILITY**

There are intuitive reasons why the importance of 'sustainability' is so low at the decision moment. When we ask Britons why they go on holiday, they tend to say it is 'to relax', 'to spend quality time with loved ones', or 'to experience something new'. Thinking of their next holiday, makes them feel 'excited' and 'happy'. Holidays represent a welcome escape from the pressures and complexities of everyday life. Indeed, our research in 2018 showed that in this age of experientialism, Britons would cut back on lots of other things before losing their holiday.

Sustainable tourism, in contrast, is loaded with negative associations. It asks people to change one of their favourite behaviours to overcome an apparently insurmountable problem. Just *thinking* about sustainability can generate helplessness, confusion, shame or fear, which, when pitted against that intense desire to take a holiday, will lead to an internal tug of war, or cognitive dissonance. People will perform mental gymnastics to justify their preferred path – ask any smoker. Our research suggests that in the case of holidays, people will bounce planet degradation to the back of their minds.

Reasons people go on holiday and feelings holidays evoke (coded responses)

I go on holiday to...

...relax

...spend quality time with loved ones

...experience something new

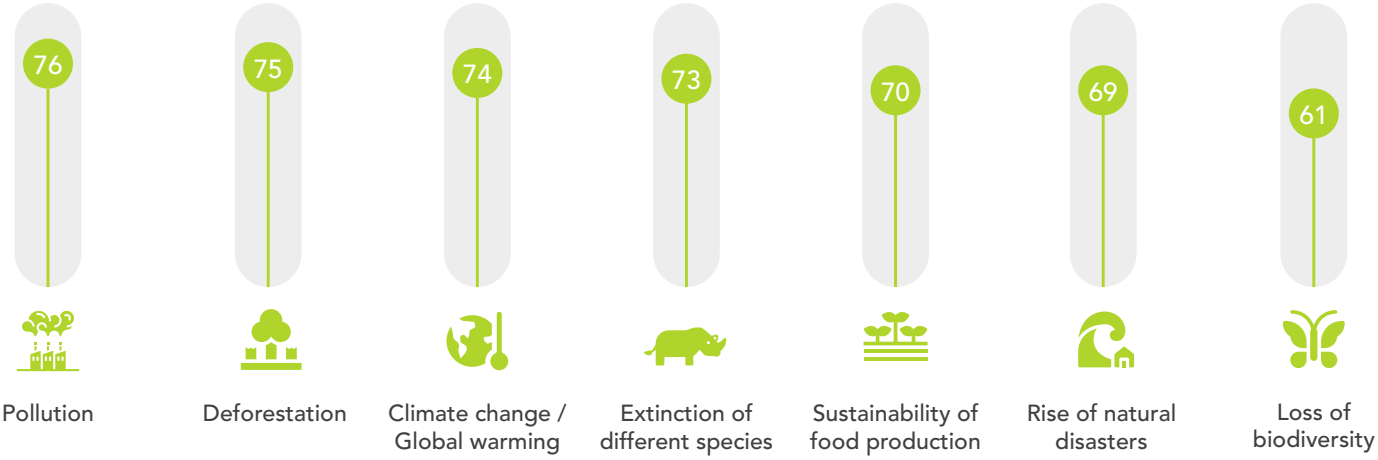
Thinking about my next holiday makes me feel...

...excited

...happy

But that's not to say that people don't care about our planet, or that they don't see themselves as having a role in saving it. When we ask Britons which environmental issues they care about, the majority show concern for all of the issues we prompt them with. A significant minority of the population (12%) even state they have already started to change their behaviour.

Issues that Britons are concerned about (% concerned)



High concern vs. low importance

The low priority of 'sustainable standards' at the decision moment suggests that tourism organisations do not currently need to put their sustainable practices front and centre of communications.

However, Britons' concern around all of the issues suggests that tourism organisations do need to do something. Their concern also suggests that blatant disregard for the environment by tourism organisations is likely to register and be off-putting.

> Britons are slowly coming to understand responsible tourism through connecting their travel motivations and concerns over environmental issues. Climate change and natural disasters are impacting the weather we might want to experience; the price we pay affects the quality of food we receive; safety is only paramount for responsible businesses; with deforestation, pollution, species extinction and biodiversity breakdown, we may not be able to see the scenery and landscapes we like; and if companies don't behave responsibly to staff and locals, we won't enjoy meeting friendly people. Making travel sustainable actually sits at the root of consumer influences and demand. Maybe after coronavirus, we will have more appreciation?

Vicky Smith, **Founder of Earth Changers**

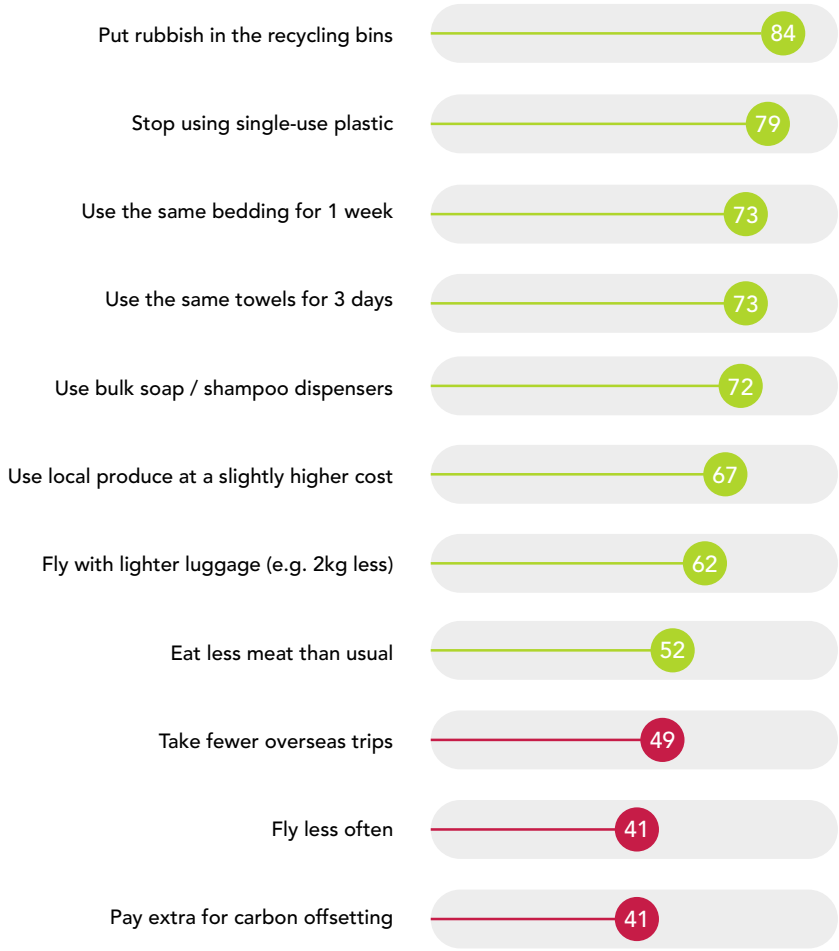
Furthermore, as news of bush fires, rising sea levels and record temperatures continue to penetrate the public consciousness, they will find it harder to block the feelings of guilt and shame out of their minds at the decision moment. So they may actively look for reassurance when booking their trips. We therefore feel it is essential that tourism organisations acknowledge and respond to concerns, even if it isn't the first thing they talk about in their communications.

What sacrifices are people willing to make on their holidays?

To help organisations develop their sustainability positioning, we asked the British public to tell us what they would be willing to do to help the environment on their holidays.

Positively, people were happy to undertake a range of different sustainable practices, from recycling their rubbish to flying with lighter luggage. They showed a willingness to make some small sacrifices, ranging from limited access to conservation areas, to a day without meat on the menu, to low energy hours at their accommodation. The scope of changes people are open to makes welcome reading for long haul destinations who fear a mass abandonment of international travel, and hospitality organisations who may save money by implementing them. It's also worth noting that some of the options we tested have the potential to be re-framed as positive actions rather than as sacrifices, empowering visitors to think they are helping the environment rather than losing out on indulgence. This is a technique currently being effectively employed by the National Trust.

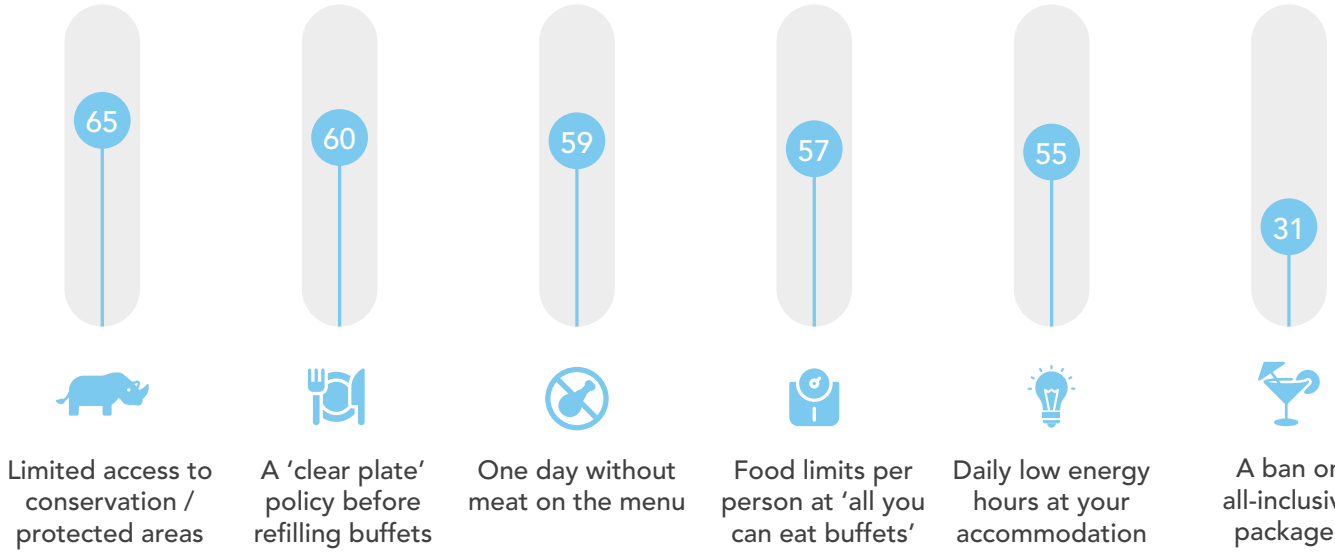
The actions people would be willing to take to help the environment on their holidays (%)



> One of the ways we encourage sustainable behaviour is through expectation transfer. Often sustainable behaviour is synonymous with giving things up, or sacrifice. But we try to reframe it so that our visitors and members feel like they are doing something positive. For example, 'pop-up volunteering' which may include a litter pick on a beach, or something else relevant at a given time and place. It's in the moment smuggling, or nudging of small better behaviours, which can then ladder up to bigger more impactful changes further down the line.

Patrick Begg, **Outdoors and Natural Resources Director at National Trust**

Restrictions people would be willing to accept on their holidays (%)



How should we talk about sustainability?

Beyond what people are willing to do, it's also important that organisations communicate sustainable practices in language the public understand. We took a selection of the words tourism organisations and visitor attractions have used to promote sustainability and tested how well they are understood.

The results showed that a large number of terms often used to talk about sustainability are not understood by the general public. The terms that weren't understood tend to be abstract, nebulous or overly scientific. Notably, 'carbon offsetting' – a perceived 'get out of jail card' for numerous organisations – was one that fell into this category.

Sustainable terms we understand...

- Recycling
- Extinction
- Single-use plastic
- Global warming
- Biodegradable
- Solar power
- Fossil fuels
- Climate change
- Compostable

Sustainable terms we don't understand...

- Green energy
- Sustainability
- Carbon footprint
- Eco-friendly tourism
- Biomass energy
- Carbon offsetting
- Renewable technology
- Sustainable sources
- Raw materials
- Anaerobic digestion

As people become more concerned and educated about environmental considerations, commercial tourism operators may want to partner their efforts with respected voices.

When we asked Britons who they are willing to listen to when it comes to the environment, we weren't surprised to see David Attenborough as number one. But perhaps more interesting was the prominence of The National Trust and The Woodlands Trust in position two and three. This clearly shows the positive role that longstanding organisations with conservation at their heart can play in influencing sustainable behaviour.

Also of interest was the positioning of Greta Thunberg and Extinction Rebellion at the bottom of the list. Militant voices do not appear to resonate with the wider public. That is not to undermine their contribution to this discussion – their direct tactics no doubt play a different role, maybe shocking people into thinking about issues they had placed at the back of their minds.

> The National Trust recognises the leadership role we have to play in promoting sustainability issues not just to our members but to wider society as well. These findings help confirm our mandate to do this. We seek to play it as straight as we can, without sensationalising the issues. This research gives us hope and the confidence to push the envelope a little further in the work we do.

Patrick Begg, **Outdoors and Natural Resources Director at National Trust**

The voices the public will listen to about the environment (size of box represents degree of influence)



Summary

Our research clearly shows that Britons care about the issues affecting our planet and this will have at least some impact on their tourism choices. They won't sacrifice their holidays, but they will happily make some small changes when taking them. They won't abandon their bucket list trips to Bangkok, but they may choose accommodation that eases the guilt of that 12 hour flight. Perhaps the human tendency towards consistency and progress means that these small changes will lead to bigger ones further down the line. But organisations won't have any impact on behaviour or perceptions if they use language people don't understand, or voices they don't want to listen to.

This is a nuanced debate and there are numerous differences by generation, region and audience type. Please do get in touch if you'd like to discuss it in detail.



Holiday Planning and Booking

Online information sources dominate holiday planning as their influence continues to grow

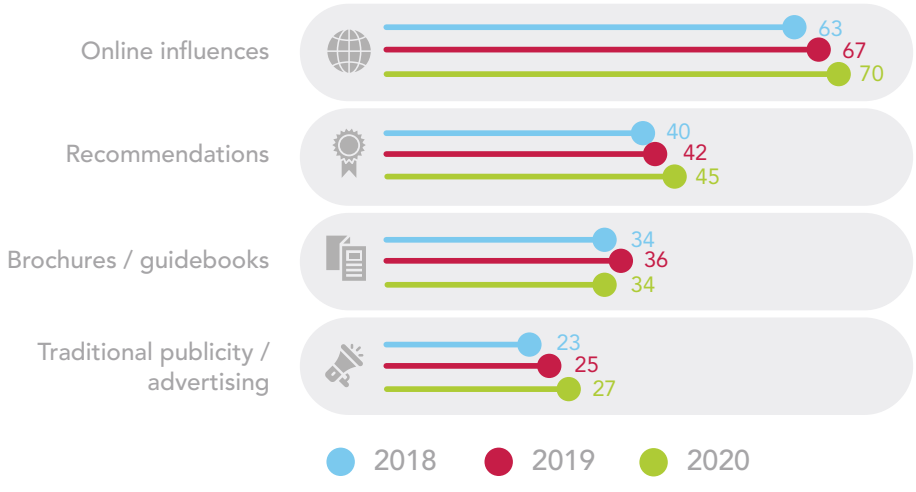
Holiday planning is a complex process that occurs over an extended period of time and across numerous devices and touch points. To aid with understanding, we simplify the process into two stages. The first – the inspiration stage – is arguably always ongoing, with passive and proactive engagements shaping a short-list of potential destinations. The second – the organising stage – is when the holidaymaker has a firm idea of where they are heading, 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.

The way in which Britons go about planning their holidays is overwhelmingly dominated by online channels. In 2019, 70% of Britons were influenced by online channels, an increase of 3 percentage points on 2018.

Recommendations from family, friends and colleagues also encourage holiday choice. Almost a third (31%) of Britons received a recommendation from family or friends and 14% received a recommendation from a colleague.

There remains a role for brochures and guidebooks, with 34% citing them as an influence (a small decrease of 2 percentage points on 2019). There is some separation in influence depending on the stage – recommendations, travel agents, brochures and social media are all more likely to be used at the inspiration stage of the holiday.

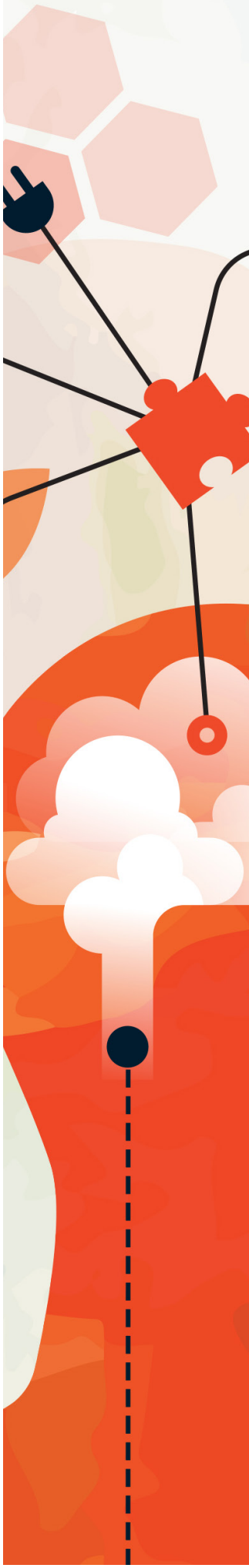
Overall influences on holiday planning (%)



Top 10 influences on holiday planning (%)

	2018	2019	2020
Search engine	30	33	37
Review sites	28	31	32
Friend/family recommendation	27	26	31
Travel agent website	17	18	18
Price comparison website	17	18	19
Online travel agent	16	18	21
Brochure picked up from a travel agent	16	18	16
Resort or tourist board website	19	17	19
Brochure posted to your home	17	15	14
Travel agent staff	14	15	14
Brochure that was downloaded	15	15	14

Of course, 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.



Social Media

Social media continues to play a significant role in holiday choice. Posts from friends and family are an influence for one in seven holidaymakers, and around one in six 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 organisations' 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 prompt a rise in visits to North America?



Influence of an organisation's social media activity

> In the New World we are about to find ourselves in, social media content and advertising may well have an even more pronounced rate of growth than has been demonstrated over the last few years.
>
> It's interesting to see that social advertising has now become even more influential on holiday choices, than social posts from trusted connections, and this clearly highlights the importance of brands investing in this medium.
>
> Many people have been spending significantly more time online and on social channels over the last few weeks than ever before and it is likely that social media content and advertising will rise even more rapidly in importance for brands, and preference by audiences.
>
> This growth could lead to an evolution in the style of social media content that is most effective for inspiring holiday choices. Whilst up until this point, authentic and insightful content about destinations and brands has been most successful, I believe this will evolve into more emotional and human based content, telling more of a travel brands' story, purpose and personality and were seeing many travel brands already adopt this approach.
>
> This should provide a deeper connection with holiday makers and achieve better cut-through at what is arguably going to be one of the most competitive periods our industry has ever seen.

Anthony Rawlins, **CEO at Digital Visitor**

13%

influenced by an organisation's social media page

10%

influenced by an organisation's social media advertising

Travel Agents and Brochures

As the influence of online information sources grow, the relevance of traditional information sources (such as travel agents and printed brochures) is called more and more into question. However, our research would suggest that both remain influential, consistently year on year. Travel agent staff were still an influence for one in seven British holidaymakers on their last main holiday, similar to recent years.

Physical brochures and guidebooks are even more important, with over a third of Britons saying they influenced their holiday. Other research 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 too.

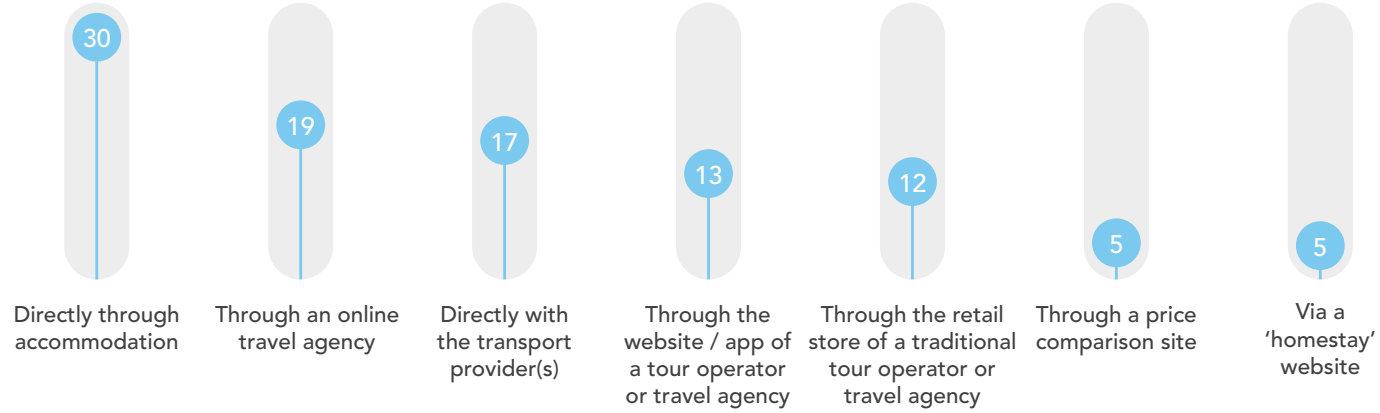
14% influenced by travel agent staff

34% influenced by a brochure or guidebook

Holidaymakers are most likely to book their accommodation directly with the accommodation provider (30%). Online travel agencies are also popular, 1 in 5 using them to book their main trip last year.

17% of holidaymakers booked with a transport provider, combining their transport and accommodation bookings in this way.

Method of booking accommodation (%)



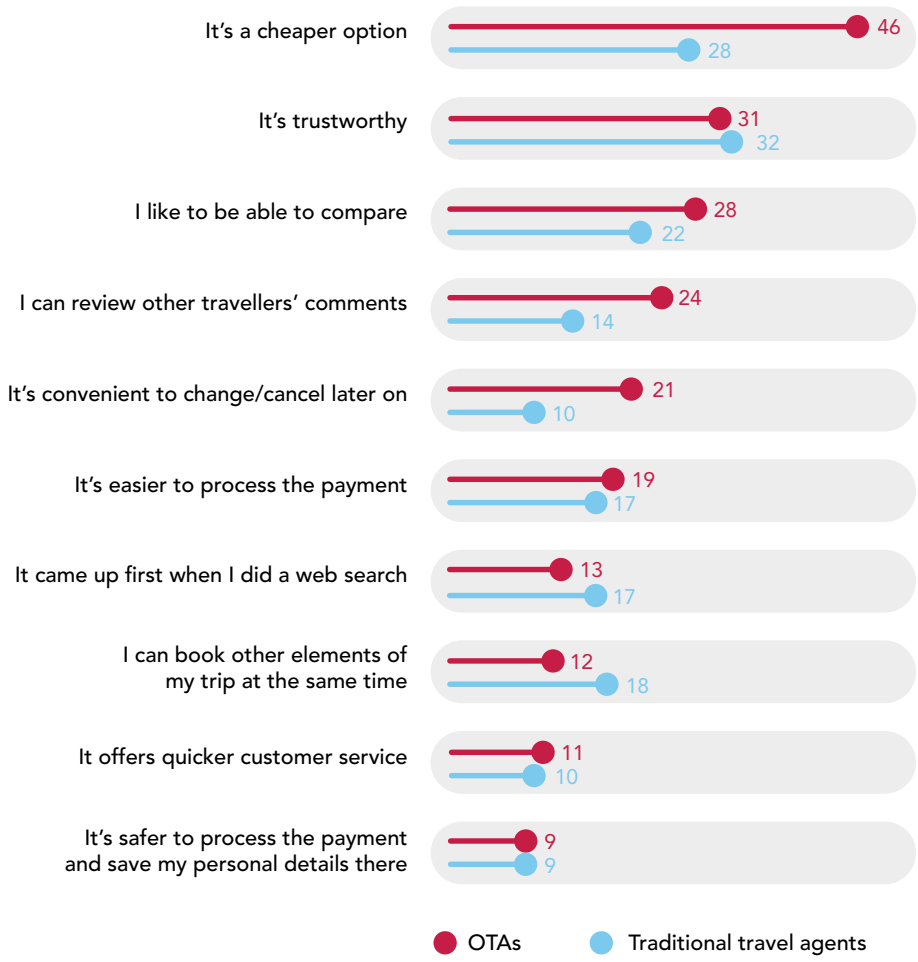
OTAs or Travel Agents?

As online travel agents (OTAs) continue to increase their share of the booking market, we sought to understand the reasons that drive their appeal instead of going direct to a provider. As a benchmark we also included the traditional travel agent, a booking source that has lost ground in recent years.

Unsurprisingly, cost was the main driver for booking via an OTA. Also unsurprising was the importance of the ability to compare accommodation, review other travellers' experiences and change/cancel later on. However, it may be surprising to learn that behind price, trustworthiness was regarded as the second most important reason for booking via an OTA. This may make worrying reading for traditional travel agents, many of whom tend to position the trust generated by personalisation as one of their unique selling points.

Also worrying to traditional travel agents seeking to claw back market share is that OTAs tend to score higher for 7 out of 10 of the booking reasons we tested.

The reasons people book through the intermediaries instead o the provider (%)





The Changing Holiday Landscape

The demand for different holidays is increasing, but barriers to taking these trips remain.

At the start of the last decade, VisitEngland produced a visionary report predicting how the holiday market would change by the year 2020. Many of their predictions were predicated on demographic changes, how an ageing (but active) population and trends away from traditional households would prompt a change in the make-up of holiday parties.

In this short closing chapter, we will put some numbers and context behind these predictions as 2020 gets under way. We'll be drawing on our Holiday Trends research, as well as some of the other comprehensive sources out there. We will especially rely on Silver Travel Advisor's comprehensive Holiday Report.

Solo Travel

According to the Office for National Statistics the proportion of people living alone in the UK has risen from 6.8 million in 1999 to 8.2 million in 2019. The average age of marriage has increased by around 3-4 years in the same time, gender equality is improving and more fluid relationships are on the rise. Alongside these social trends, we've seen a rise in wellness and transformational tourism (e.g. yoga retreats) which do not necessarily require travel companions. Technologically, omnipresent Wi-Fi and social media has created a world where it's possible to be in company even when you are physically alone – as is now being abundantly demonstrated by self-isolated home working.

All of these conditions provide the perfect backdrop for a rise in solo travel. Our research illustrates that nearly one in 10 Britons took their main holiday alone last year. Solo travellers go to all corners of the world, but our data show that they over-index on long haul destinations such as Africa, the Middle East, and South East Asia.

9%

of Britons took their main holiday alone in 2019

When thinking of the solo traveller, it's easy to imagine young carefree singles, travelling the world, in the hope of finding their place in it. But whilst these people undoubtedly exist, it's a misconception to put all solo travellers in this bracket. Silver Travel Advisor's comprehensive report on the over 50s market demonstrates that over half of this age group have taken a holiday on their own in the last 5 years. According to Mintel, around a third of solo travellers are in a relationship – solo holidays give them the opportunity to pursue interests that their partner is not interested in, meeting new like-minded people in the process.

Silver Travel Advisor highlight some of the barriers to taking solo trips. Single supplements are the greatest barrier to solo trips, but interestingly a significant proportion stated that they wouldn't want people to think they are looking for a relationship. If these barriers can be overcome, solo trips may increase in future years.

Multi-generational holidays

The polar opposite of solo trips is multi-generational holidays, when more than one generation holiday together. These types of trips have increased in prominence in recent years and there are varying drivers behind this. Insurance company Aviva report that 1.5 million households have three generations or more in them, a figure expected to rise by 2025. For these households the trip may be a natural extension, although some may have the opposite effect. The baby boomer population have high disposable income and an experience of travel that generations before them had not experienced. It's easy to think of pensioners as inactive, but the current wave is the generation of Julie Walters and Mick Jagger, incredibly active and living life to the full.

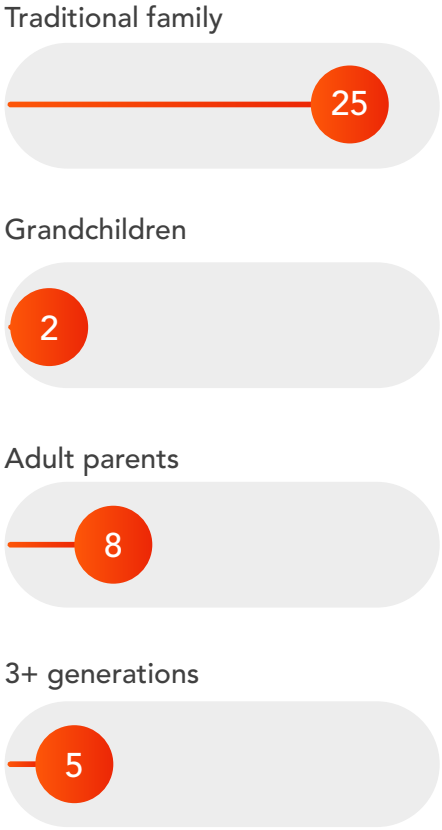
There are a range of definitions of multi-generational trips. For the purposes of this report we have broadly followed the model used by VisitEngland in their comprehensive report on the subject.

1. **Traditional family:** A trip that involves own children but no other generations
2. **Grandchildren:** A trip that does not involve own children, but does involve grandchildren
3. **Adult parents:** A trip with older parents but no children
4. **3+ generations:** A trip that involves three generations or more including children

Overall, 40% of Britons' main holiday in 2019 was with a family member from another generation.

Unsurprisingly, traditional family trips (parent and child only) were the most popular type of multi-generational trip, 25% of Britons' falling into this category, followed by a trip with adult parents (8%). 2% of Britons took a trip with their grandchildren and 5% took a trip which involved 3 or more generations. Trips with 3+ generations are more likely than average to be taken in the UK (46% compared to 39% of all Britons), although they also index higher on trips to the USA (14% compared to 5% on average).

Proportion of Britons that took the following types of main holidays in 2019 (%, proportions are mutually exclusive)



Silver Travel Advisor's 2020 report highlighted the importance of activities for all generations on their trip. This finding is supported in our research – both 'beaches' and 'activities available' index significantly higher than average as destination influences. Visitor attractions can play a vital role here – they are already well versed at appealing to all age groups, particularly the youngest and oldest. Safety is also more likely to be cited as a priority, underlining the concerns that may be held around travelling with children and the elderly.

In their launch event in January 2020, Silver Travel Advisor brought a four generations family to explain how and why they undertake their trips together. For the generation with children, having family to look after their children was especially important. It's not all parlour games around the fire though. Space was regarded as important to all generations – multiple bathrooms a priority, as also somewhere quiet to relax.

Our research indicates that of the parties that took a 3G+ multi-generational holiday, 41% had a mobility issue or impairment, highlighting the importance of accessible facilities as well. This type of trip is likely to assume even greater prominence following Coronavirus, with families seeking to reconnect after enforced time apart.

> 3, 4 and even 5 generation families are one of the consequences of the ageing population, and with big birthdays and big anniversaries to celebrate, there's a growing trend for the whole family to get together on holiday to mark the occasion. The travel industry has identified this emerging sector and is coming up with solutions for multi-generational groups where there is something on offer for everyone. Large villas are seen as an ideal choice, especially where self-contained annexes ensure grandparents can get a little peace and quiet, along with family cruises which offer children's clubs, teenage discos, adult-only deck areas, plus activities and entertainment suitable for all ages. Another growing trend is private escorted tours with family groups tailor-making their own adventure in a large minibus with a driver and guide. And of course UK holidays are also very popular, as they involve no flying for the oldest generation and no worries about health care insurance. The multi-generational market demographic reflects a societal shift, and our own research has shown that 25% of grandparents are footing the bill for the big family holiday.

Debbie Marshall, **Managing Director at Silver Travel Advisor**

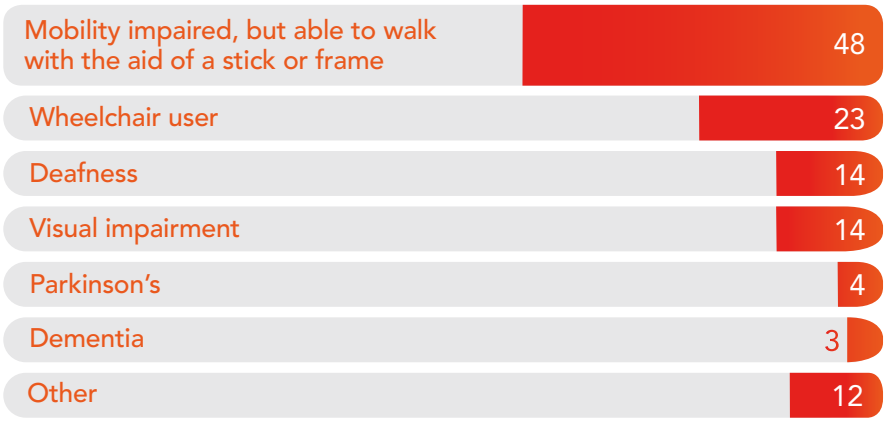
Accessible holidays

The UK population is ageing, and the ONS predicts that by 2040 one in seven of the population will be aged 75+. An ageing population brings with it a rise in physical impairments and greater demand for accessible holidays. Our research indicates that 1 in 5 Britons have taken a holiday in the last 2 years where one of their party members had a disability or a special need. Mobility impairment was the most common disability (48%), followed by wheelchair use (23%), deafness (14%), and visual impairment (also 14%).

19%

took a holiday in the last 2 years where either themselves or immediate party member had a disability or special need

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



Not all of these holiday-makers will be on a multi-generational trip with children or grandchildren to provide support. Many will be hoping the hospitality organisations, restaurants, transport providers and visitor attractions will provide adequate support and facilities themselves.

Whether or not someone will go on a holiday with someone with accessibility needs will depend very much on the information they can glean at the planning stage. Our research indicates that for around seven in 10 of those with a disability or special need finding relevant information in advance of their trips was 'easy'. Accommodation providers were regarded the most positively, restaurants the least positively, although there was only seven percentage points difference between the two.

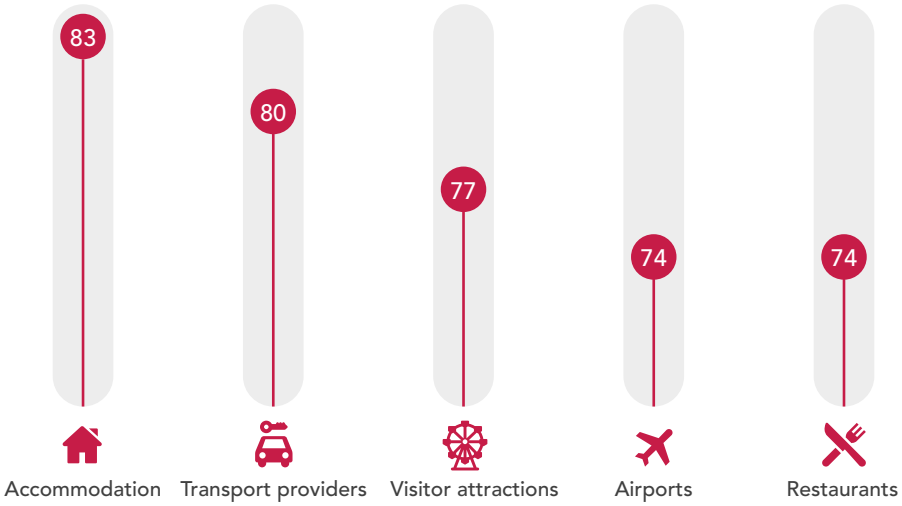
Ease of finding necessary information (% easy)





When it comes to how well organisations cater to the needs of those with disabilities or impairments, accommodation providers and restaurants again take up first and last place, although this time the latter are joined by airports.

Effectiveness in catering to your needs (% good)



Although the high ratings are clearly a positive, a notable minority did not provide positive ratings for information provision or catering to their needs, suggesting for some brands more can be done to improve the process.

Developing accessible information and provision may give more confidence to the 10% of Britons who would like to have gone on a holiday with someone with a disability in the last two years, but haven't been able to.

10%

would have liked to go on holiday (in the last 2 years) with someone with a disability or special need but decided against it

> With nearly 14m people registered disabled in the UK, of which 6.5 million aged over 60, the so-called "purple pound" is a huge opportunity for the travel industry. However, it's a market segment which needs to be handled carefully and respectfully, recognising that many disabilities are hidden and that each disabled person has individual requirements and limitations. Selecting a hotel with adapted rooms and appropriate service is only part of the challenge, and many people living with a disability actually find the hardest part of going on holiday can be getting through an airport and securing appropriate travel insurance. Whilst some mainstream operators offer a good level of assistance and information, it's the specialist companies who excel in this area with dedicated and individually audited properties for those with limited mobility or other disabilities, care-assisted and accessible coach tours, dementia-friendly holidays and personal service and support from experienced and trained staff.

Debbie Marshall, **Managing Director at Silver Travel Advisor**

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 Report 2020 is based upon up-to-date primary research among a nationally representative sample of 1000 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 2020. In addition to the January research, 500 respondents were interviewed between 20th and 23rd March. A breakdown of demographics from both waves can be provided on request. Both waves of research were 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.

Report Contributors

We are incredibly grateful to the industry experts who provided quotes to add colour and context to each of our chapters. In exchange for this free report, we urge readers to check out their websites below.



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