Overseas Trip Trends

ANTOR HOLIDAY TRENDS REPORT

February 2024

Contents

The travel landscape

Four key trends since the pandemic

1

A younger trip-taker

2

More last-minute booking

3

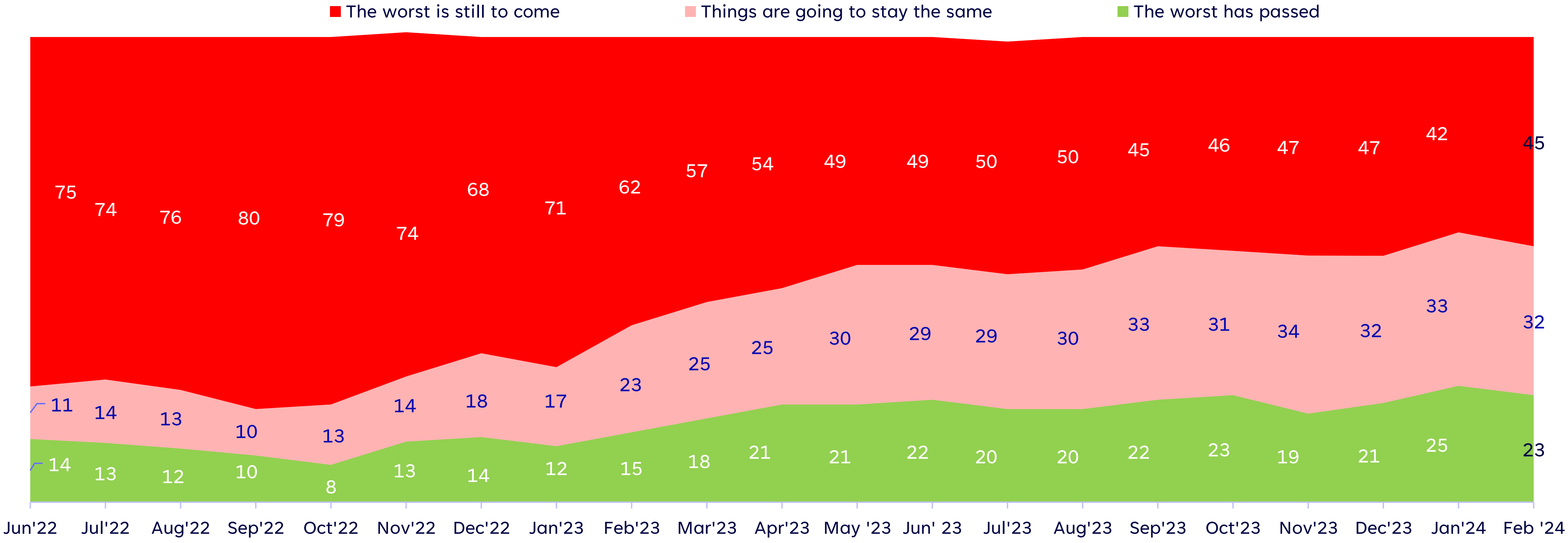
Short-haul bouncing back quicker than long haul

4

Tour operators preferred to independent booking

The public remain pessimistic about the cost of living crisis, but there are signs of increased optimism

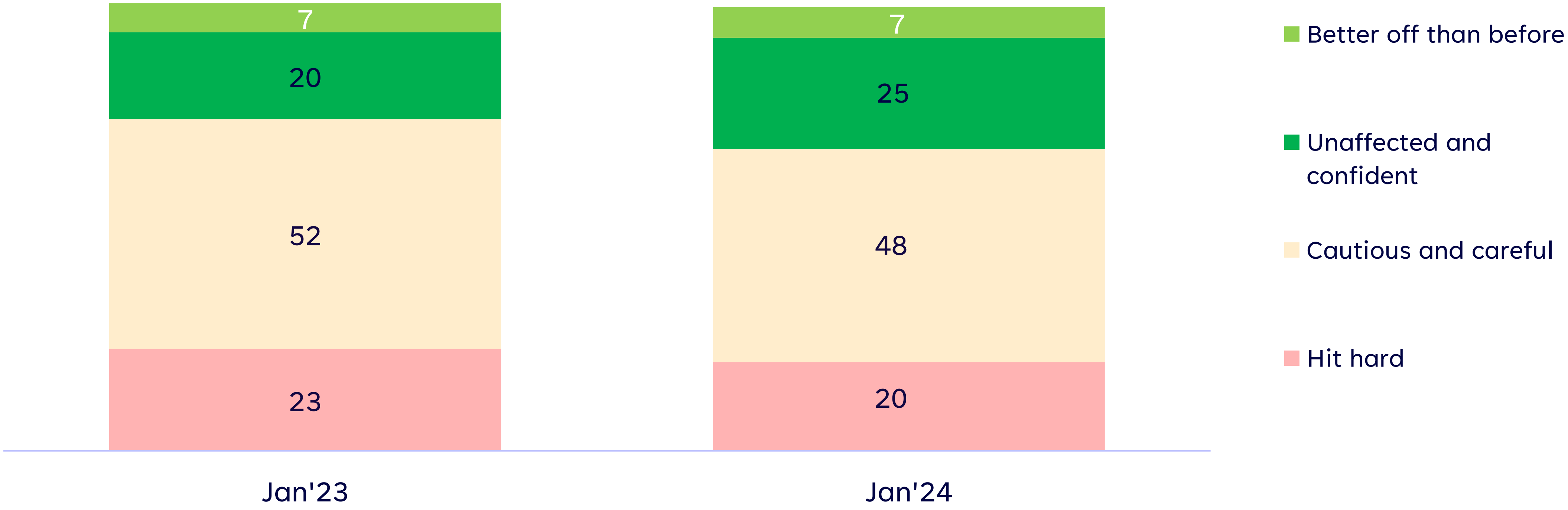
Perception of the situation with regards to cost of living crisis (%)



Question: Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All respondents. January 2024 = 1,756

Most of the public are hit hard or cautious but this proportion has also fallen since last year

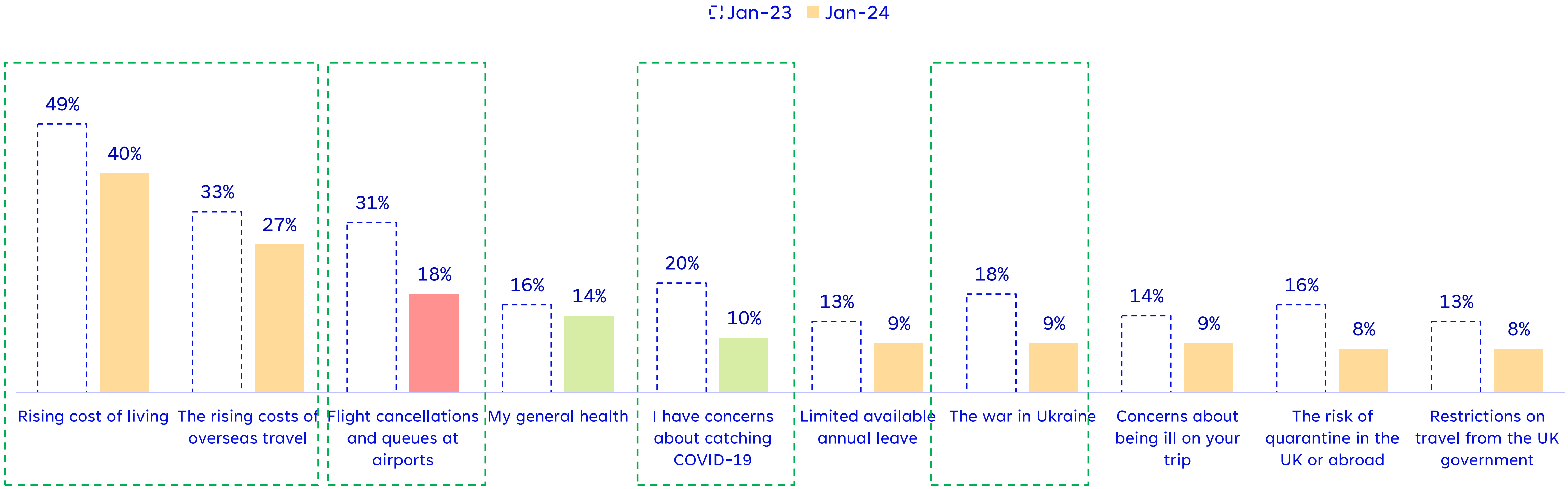
Personal impact of cost of living crisis (%)



q17: There has been a lot of talk about how the coronavirus pandemic is affecting people's financial circumstances. If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now? Base: All respondents. January 2024 = 1,756

Increased optimism translates to fewer cost-related barriers to overseas travel – other barriers have also dropped

Perceived barriers to overseas travel in next few months (%)



7 Q16. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in the next few months?
n=1,000

Cost remains a reason for choosing for domestic trips over overseas but there are other factors that drive overseas visits

Leading reasons for preferring UK/overseas trips

TOP 5 reasons for UK preference

1. UK holidays are easier to plan (56%)
2. UK holidays are cheaper (51%)
3. Shorter / quicker travel (47%)
4. To avoid long queues at airports/cancelled flights (39%)
5. I want to take holidays in places I am familiar with (28%)

TOP 5 reasons for Overseas preference

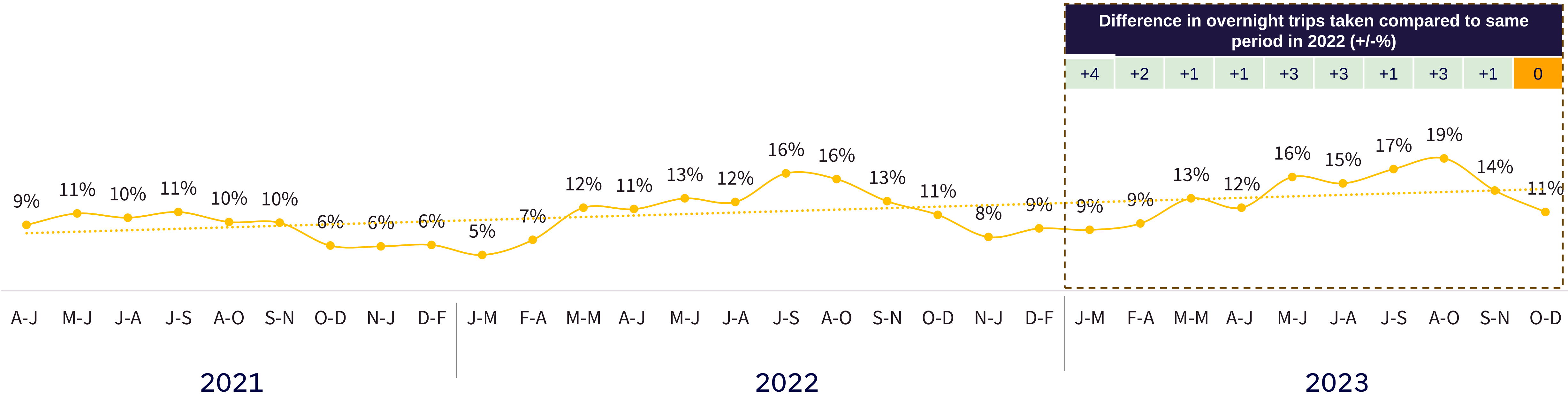
1. Better weather (51%)
2. I want to visit new places/experience new cultures (46%)
3. Overseas holidays are cheaper (30%)
4. I'm prioritising overseas trips after missing out in the last few years (25%)
5. To visit friends or relatives (18%)

VB2k. Why are you more likely to choose a UK trip than an overseas trip? January 2024 = 637 VB2l. Why are you more likely to choose an overseas trip than a UK trip? January 2024 = 454

Trip-taking trends

Overseas trip taking has gradually increased since 2021 and was higher in every period in 2023 than in 2022

OVERSEAS short breaks or holidays taken in last 3 months trended over time (Proportion of population)



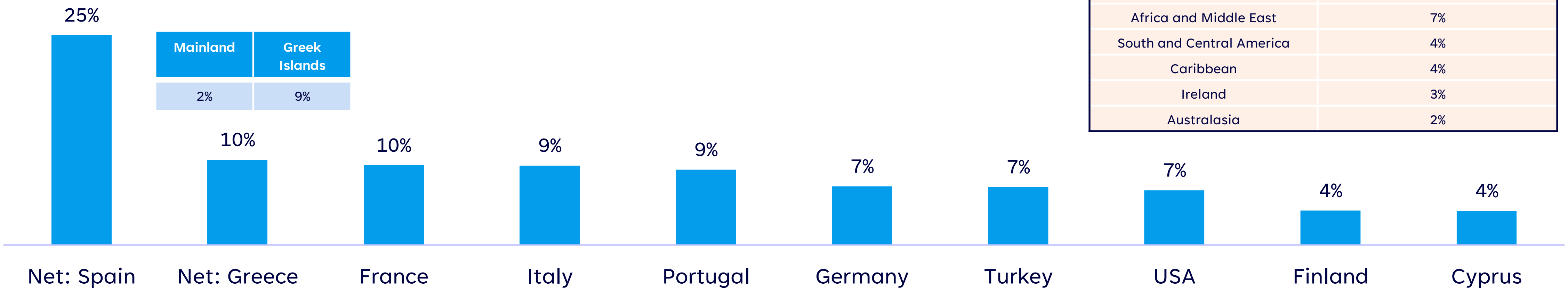
VB13g. In which of the following months have you taken an overnight short break or holiday overseas in the last 12 months?
Base: All UK respondents. n=1776;
*Actual trips taken is only available from April 2021 up to December 2022.

Spain was the leading destination for trips taken this summer – followed by Greece, France, Italy and Portugal

Top 10 individual overseas destinations for trips taken between June and August 2023 (% of all overseas trip-takers with that period)

Mainland	Canary Islands	Balearics
11%	7%	10%

Mainland	Greek Islands
2%	9%

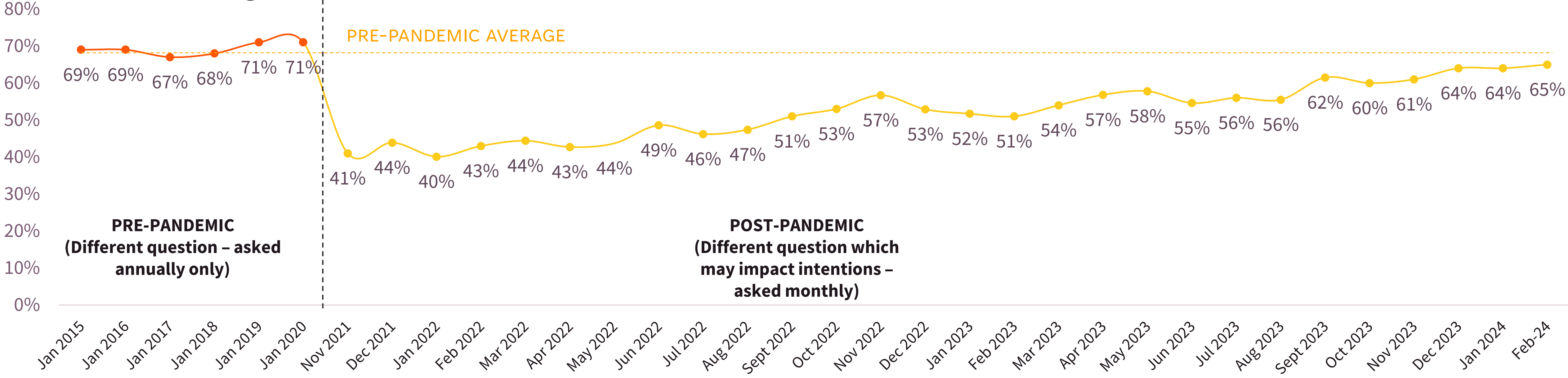


World Region	% of all June to August trip-takers
Iberian Peninsula	33%
South East Europe	24%
Western Europe	16%
Southern Europe	11%
Northern Europe	10%
Central Europe	10%
Eastern Europe	9%
Asia	8%
North America	8%
Africa and Middle East	7%
South and Central America	4%
Caribbean	4%
Ireland	3%
Australasia	2%

11 VB13h. Thinking about your last overnight short break or holiday overseas, where did you go?
Base: 1,750 respondents

Overseas trip intentions suggest that trip taking is nearing pre-pandemic levels

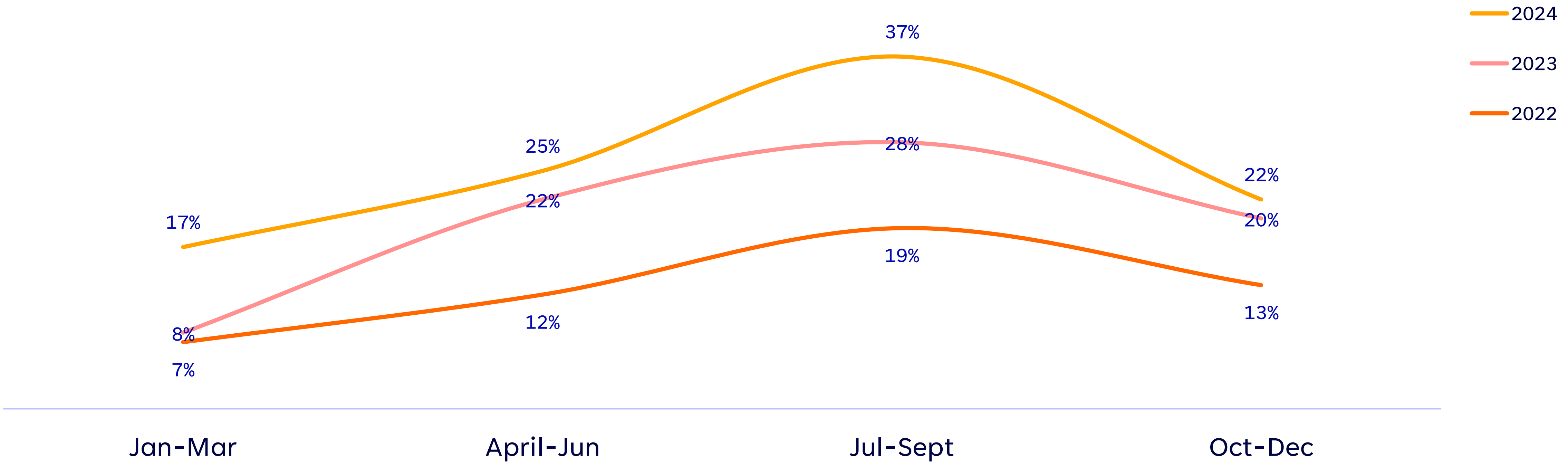
OVERSEAS short breaks or holidays intended within next 12 months (% rolling 12 month percentages)



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All UK respondents. n=1776
*Actual trips taken is only available from April 2021 up to December 2022.

Intentions are higher for each quarter in 2024 than the equivalent periods in 2023 and 2022

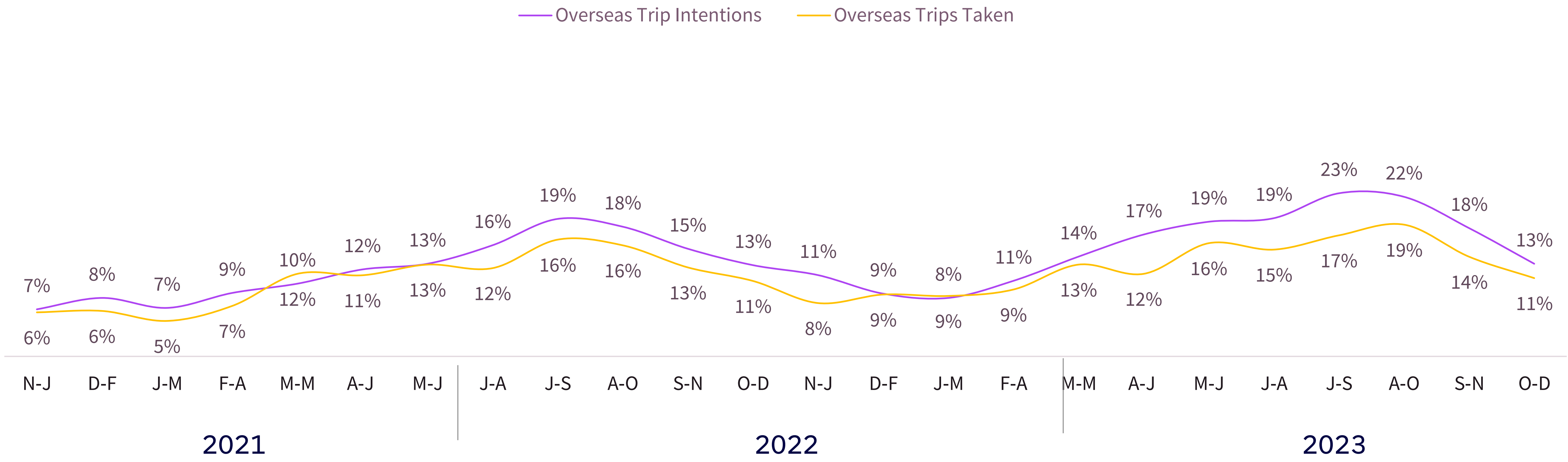
Quarterly trip intention by year (%)



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All UK respondents. n=1776
13 *Actual trips taken is only available from April 2021 up to December 2022.

Overseas intentions are also ‘sticky’ – intentions likely to convert into trips

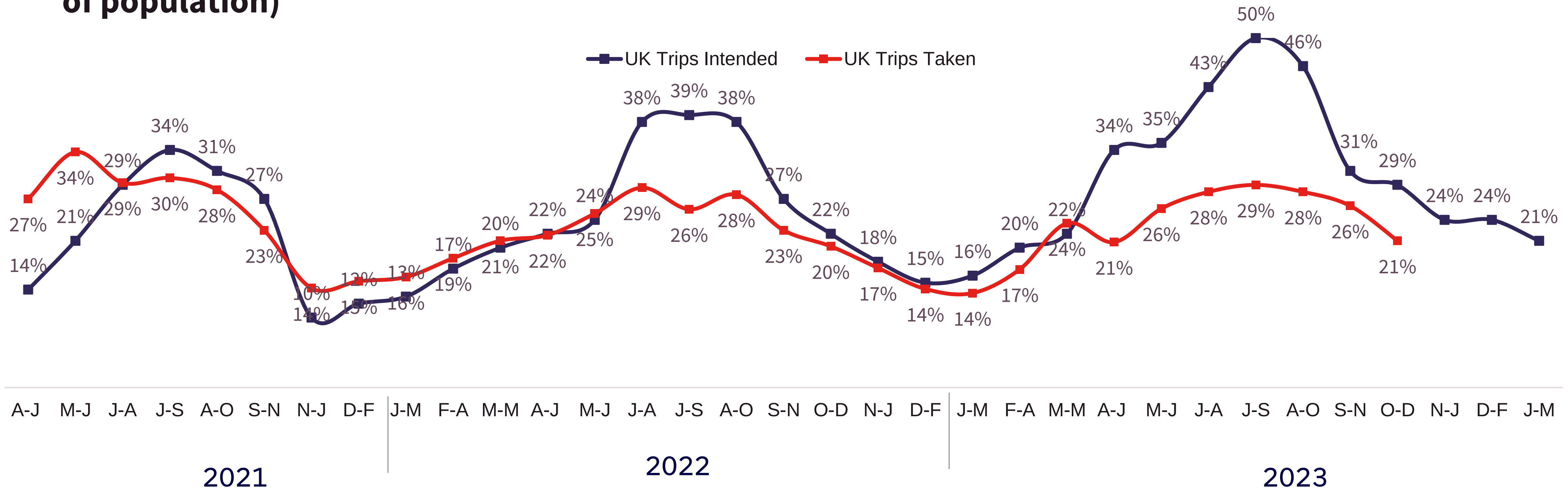
OVERSEAS short breaks or holidays taken in last 3 months trended over time (Proportion of population)



VB13g. In which of the following months have you taken an overnight short break or holiday overseas in the last 12 months?
VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All UK respondents. n=1776;

This is a marked contrast to UK trips – particularly in the peak season, where almost half intending a trip do not end up taking it

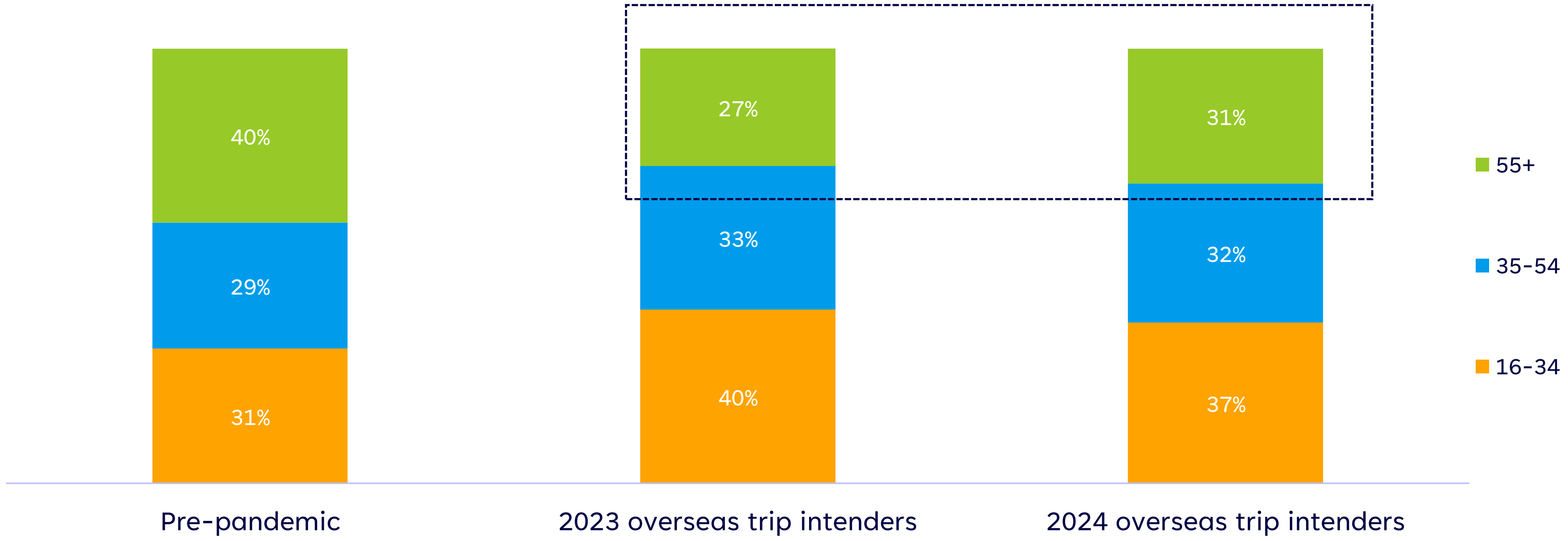
UK short breaks or holidays taken in last 3 months trended over time (Proportion of population)



VB13g. In which of the following months have you taken an overnight short break or holiday overseas in the last 12 months?
Base: All UK respondents. n=1776;
*Actual trips taken is only available from April 2021 up to December 2022.

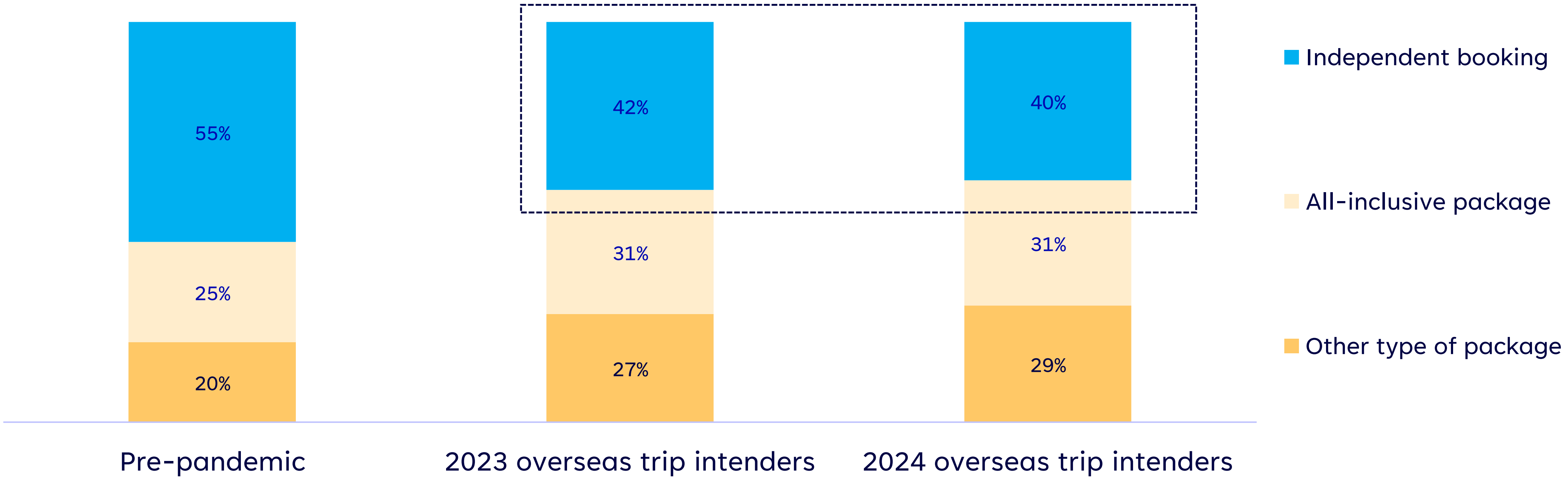
The rise in intention is driven by older age groups, who appear to be returning to overseas travel

Age of overseas trip intenders (%)



Trip-types are still far more likely to be package than independently booked however

Types of trips pre and post pandemic (%)



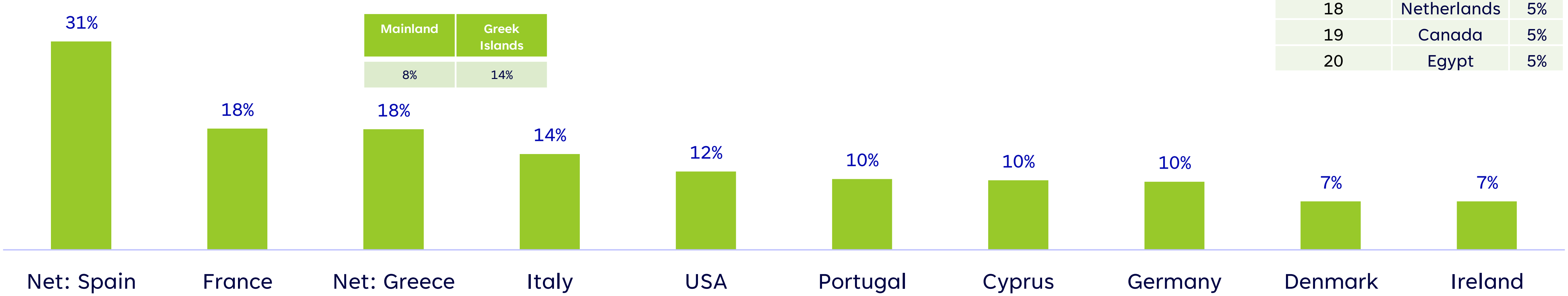
Profiles and destinations

Spain is the leading destination for 2024 trips, followed by France, Greece, Italy and the USA

Top 10 individual overseas destinations for trips planned in the next 12 months (% all respondents)

Mainland	Canary Islands	Balearics
17%	15%	14%

Mainland	Greek Islands
8%	14%



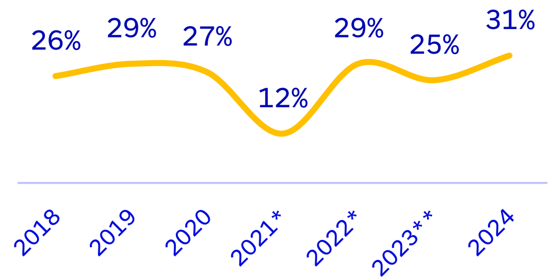
TOP 11-20 DESTINATIONS		
11	Turkey	7%
12	Belgium	7%
13	Finland	6%
14	Austria	6%
15	Dubai	6%
16	Croatia	5%
17	Iceland	5%
18	Netherlands	5%
19	Canada	5%
20	Egypt	5%

Which of these countries will you be visiting or are you seriously thinking about visiting for a short break holiday (1-3 nights away)/longer holiday of 4+ nights in the next 12 months?
Base: 1,750 respondents
*Trips will be biased to upcoming months

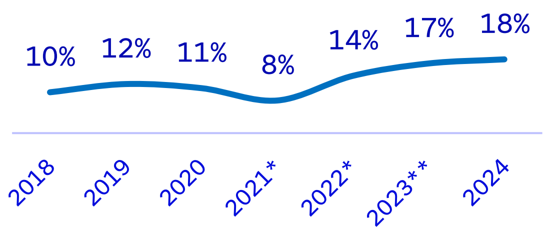
Over time Spain's position has been consistently strong, Greece is the big mover, and independent destinations on the rise.

Notable trends by destination*** (All respondents)

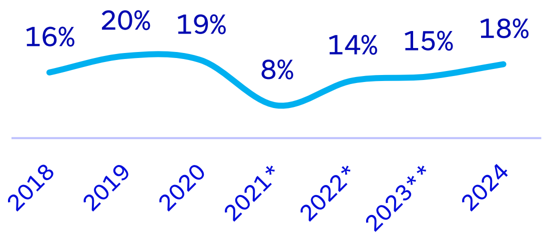
Spain



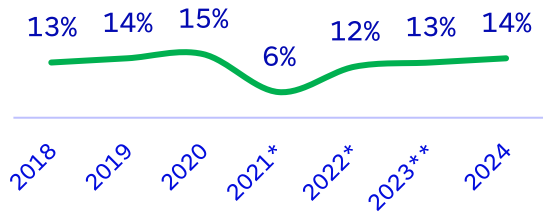
Greece



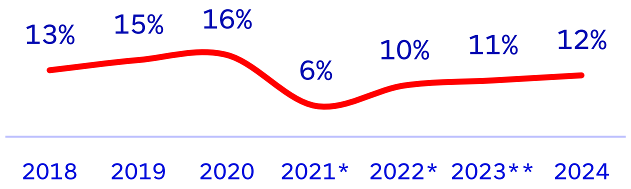
France



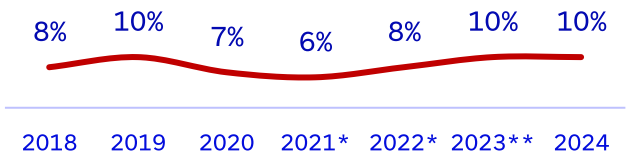
Italy



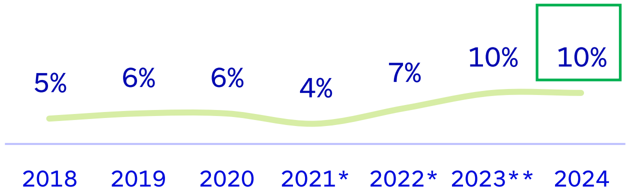
USA



Portugal



Cyprus

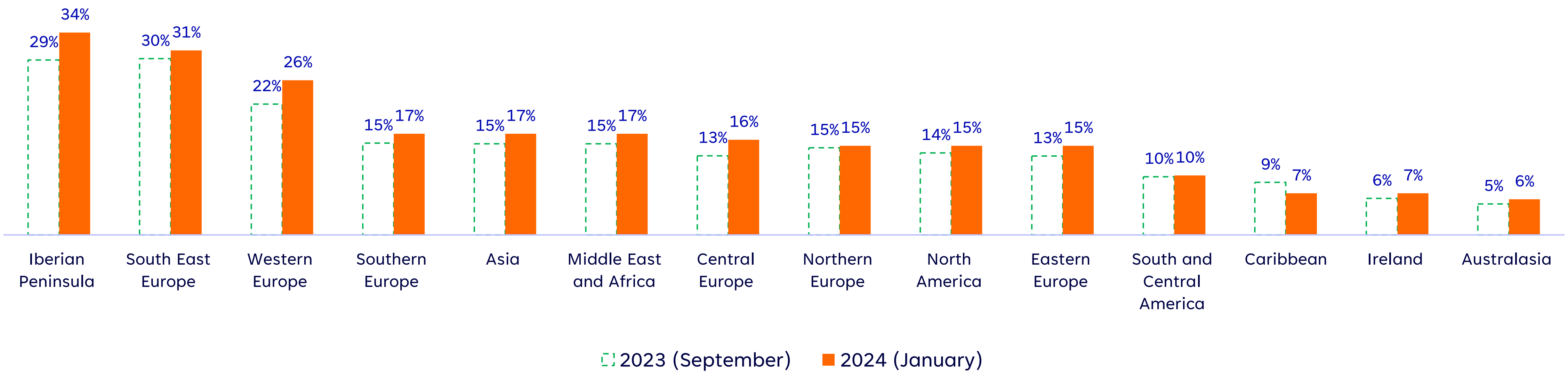


Note: Due to below reasons, trends are indicative only *2021 and 2022 surveys asked in June meaning seasonal saliency may boost some 'summer' destinations such as Spain **2023 survey asked in September meaning seasonal saliency may boost some 'autumn/winter' destinations (e.g. city break/Christmas destinations) such as Germany/Denmark. 2023 survey also excluded UK destinations, which is likely to boost overseas destinations

Almost every world region is set to experience an uplift in UK visitors in the next year

Leading regions for trips planned in the next 12 months (All respondents)

1st in region	Spain 31%	Greece 14%	France 18%	Italy 14%	Japan 4%	Dubai 6%	Germany 10%	Denmark 7%	USA 12%	Poland 4%	Mexico 4%	Jamaica 3%		Australia 4%
2nd in region	Portugal 10%	Cyprus 10%	Belgium 7%	Malta 5%	Thailand 4%	Egypt 5%	Austria 6%	Finland 6%	Canada 5%	Romania 3%	Costa Rica 3%	Cuba 2%		New Zealand 3%

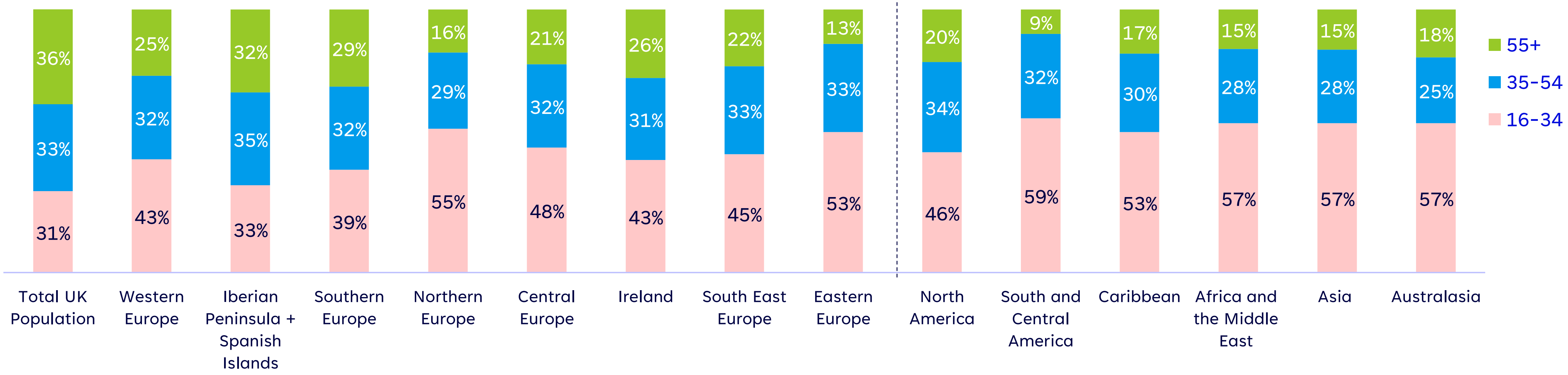


Which of these countries will you be visiting or are you seriously thinking about visiting for a short break holiday (1-3 nights away)/longer holiday of 4+ nights in the next 12 months?
Base: 1,750 respondents
*Trips will be biased to upcoming months

The age profile differs considerably by destination

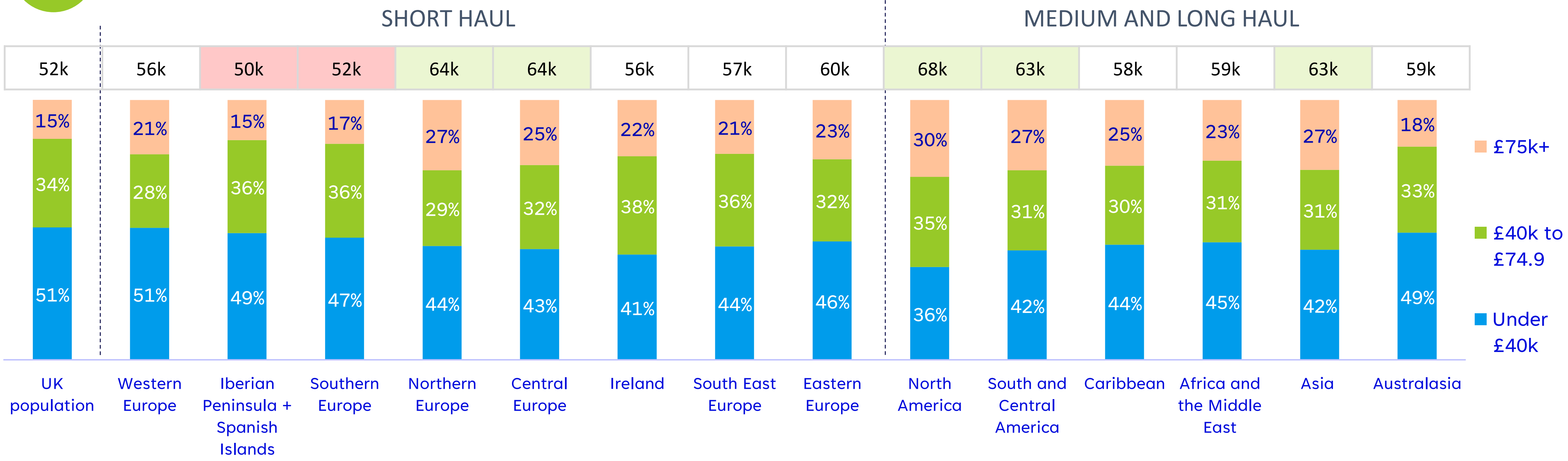
Age by intended destination

	SHORT HAUL									MEDIUM AND LONG HAUL					
Average	47	42	46	44	37	40	42	40	37	41	35	38	37	36	38



Income also varies – Spain for all of its popularity attracts the visitor with the lowest household income

Household Income by intended destination



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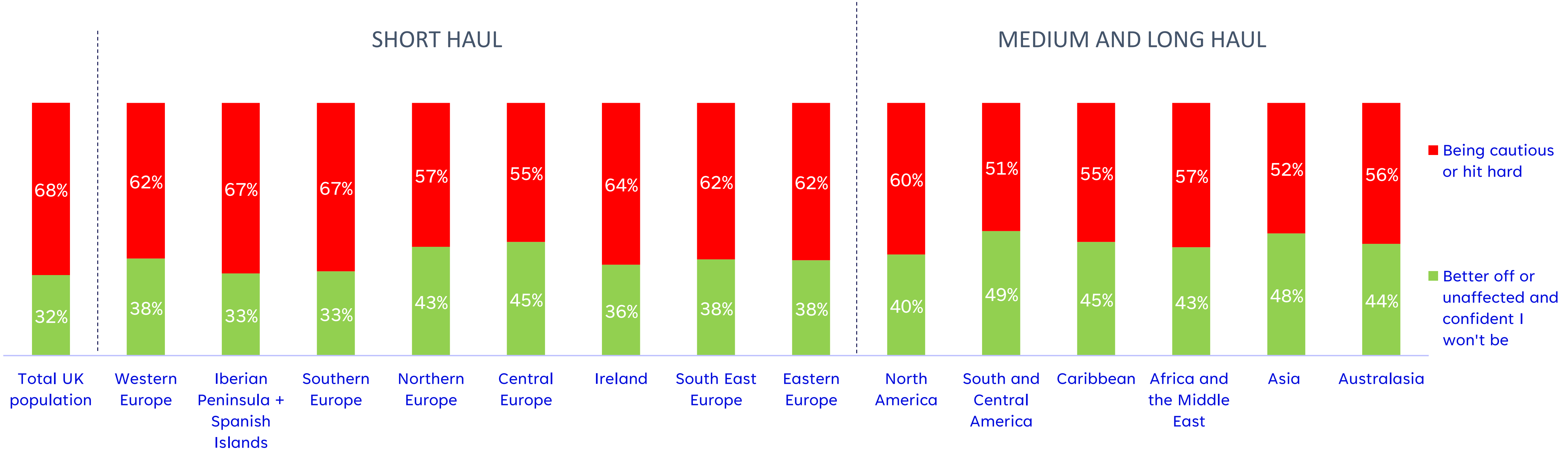
Income correlates with impact of cost-of-living – Spain the most impacted

Cost-of-living impact by destination



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Bucket-list destinations

The ranking of bucket-list destinations is very different to general destination intention

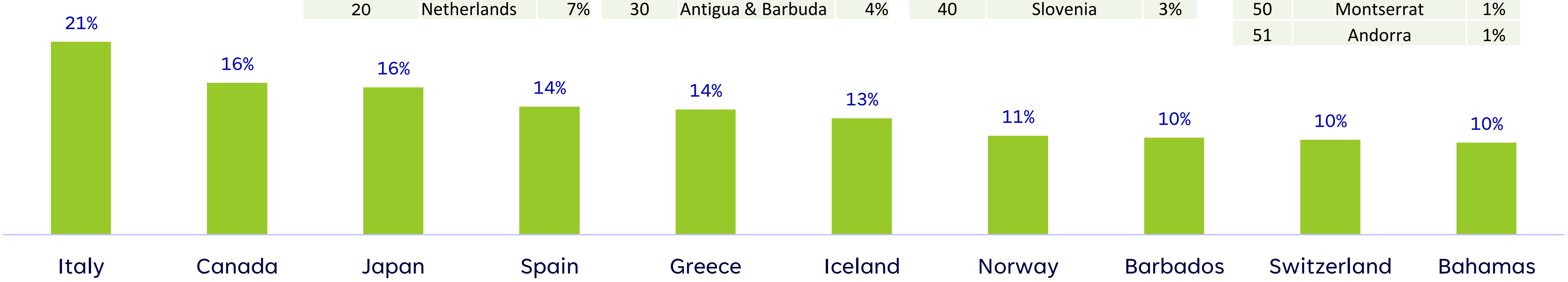
Top 10 individual 'bucket-list' destinations – of ANTOR members.
(% all respondents)

TOP 11-20 DESTINATIONS		
11	France	10%
12	Croatia	9%
13	The Seychelles	9%
14	Egypt	8%
15	Ireland	8%
16	Cyprus	8%
17	Miami	7%
18	Germany	7%
19	Sweden	7%
20	Netherlands	7%

TOP 21-30 DESTINATIONS		
21	Lapland	7%
22	Morrocco	7%
23	Malta	6%
24	Austria	6%
25	Denmark	6%
26	Malaysia	5%
27	Philippines	5%
28	Sri Lanka	5%
29	Jersey	5%
30	Antigua & Barbuda	4%

TOP 31-40 DESTINATIONS		
31	Poland	4%
32	Gibraltar	4%
33	Finland	4%
34	Korea	4%
35	Isle of Man	4%
36	Czech Republic	3%
37	Belgium - Flanders	3%
38	Guernsey	3%
39	Israel	3%
40	Slovenia	3%

TOP 41-51 DESTINATIONS		
41	Tunisia	2%
42	Luxembourg	2%
43	Catalonia	2%
44	Nassau Paradise Isl	2%
45	Taiwan	2%
46	Belgium - Wallonia	2%
47	Samoa	1%
48	Estonia	1%
49	Ras Al Khaimah	1%
50	Montserrat	1%
51	Andorra	1%

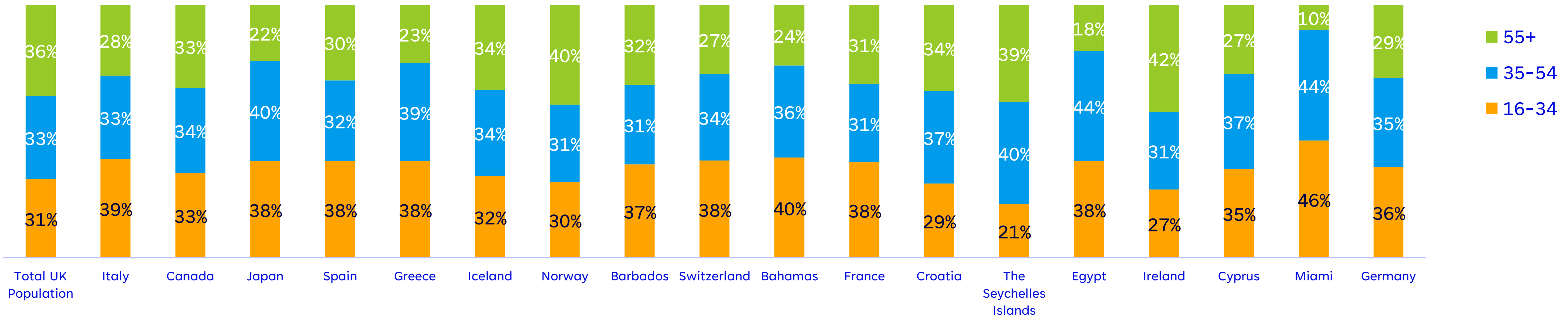


29 HT6w56: People often have a list of bucket-list holiday destinations that they really hope to visit at some point in the future. Which, if any, of the list below are on your bucket-list?
Base: 1,750 respondents

Age by bucket-list destination: Summary

Age by bucket-list destination

Average	Total UK Population	Italy	Canada	Japan	Spain	Greece	Iceland	Norway	Barbados	Switzerland	Bahamas	France	Croatia	The Seychelles Islands	Egypt	Ireland	Cyprus	Miami	Germany
	47	44	46	42	44	42	46	49	45	43	42	45	47	49	42	50	44	37	44

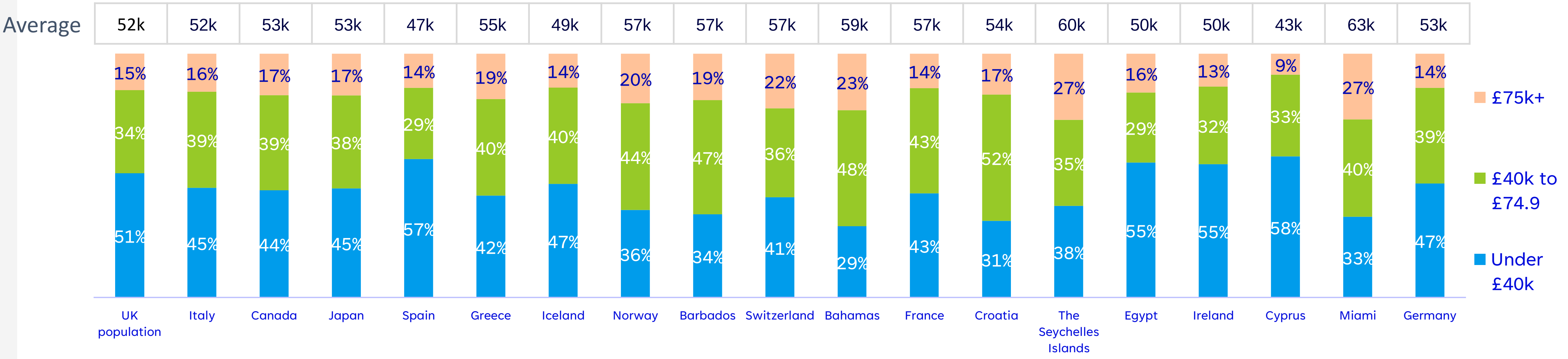


Base sizes

Italy	Canada	Japan	Spain	Greece	Iceland	Norway	Barbados	Switzerland	Bahamas	France	Croatia	The Seychelles Islands	Egypt	Ireland	Cyprus	Miami	Germany
290	237	237	214	192	191	149	149	159	151	148	131	117	117	121	115	116	112

Household Income by bucket-list destination

Household Income by bucket-list destination



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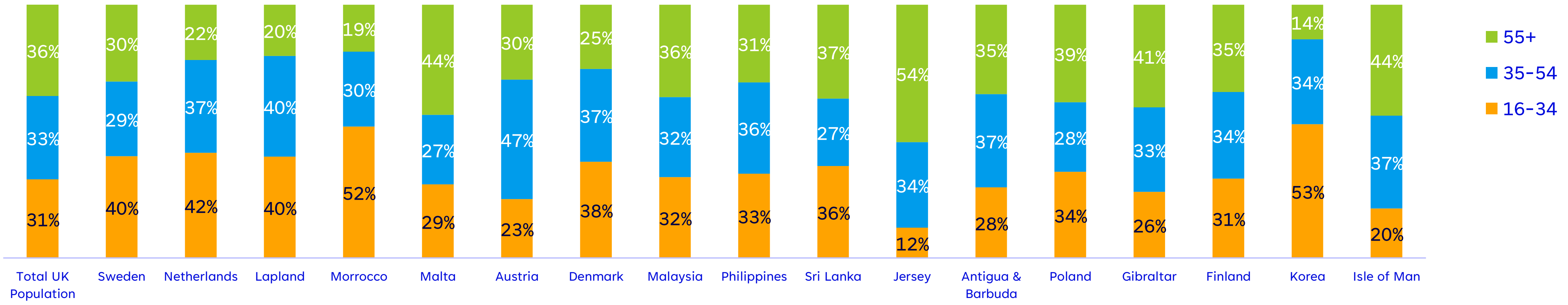
290	237	237	214	192	191	149	149	159	151	148	131	117	117	121	115	116	112

Age by bucket-list destination: Summary

Age by bucket-list destination

Average	Total UK Population	Sweden	Netherlands	Lapland	Morrocco	Malta	Austria	Denmark	Malaysia	Philippines	Sri Lanka	Jersey	Antigua & Barbuda	Poland	Gibraltar	Finland	Korea	Isle of Man
Average	47	43	42	41	38	49	47	43	47	46	47	57	48	48	50	47	37	52

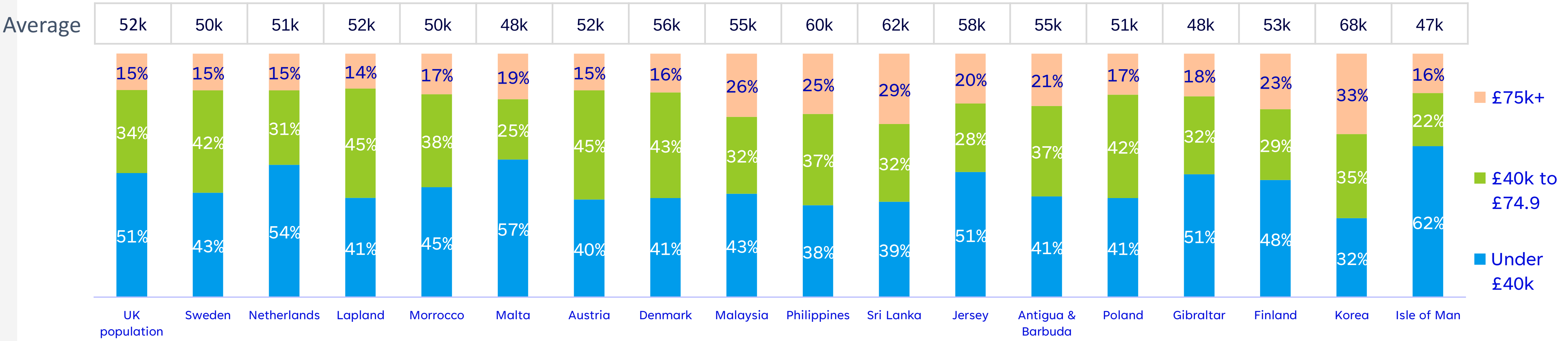


Base sizes

Sweden	Netherlands	Lapland	Morrocco	Malta	Austria	Denmark	Malaysia	Philippines	Sri Lanka	Jersey	Antigua & Barbuda	Poland	Gibraltar	Finland	Korea	Isle of Man
97	97	110	94	88	83	78	63	68	73	60	69	73	64	68	62	53

Household Income by bucket-list destination

Household Income by bucket-list destination



Base sizes

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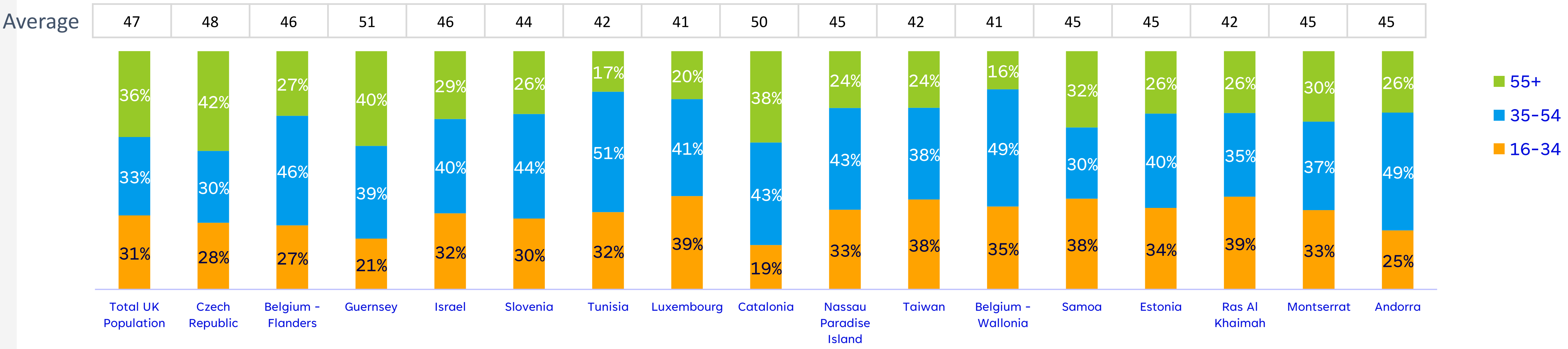
97	97	110	94	88	83	78	63	68	73	60	69	73	64	68	62	53

Age by bucket-list destination: Summary

Age by bucket-list destination

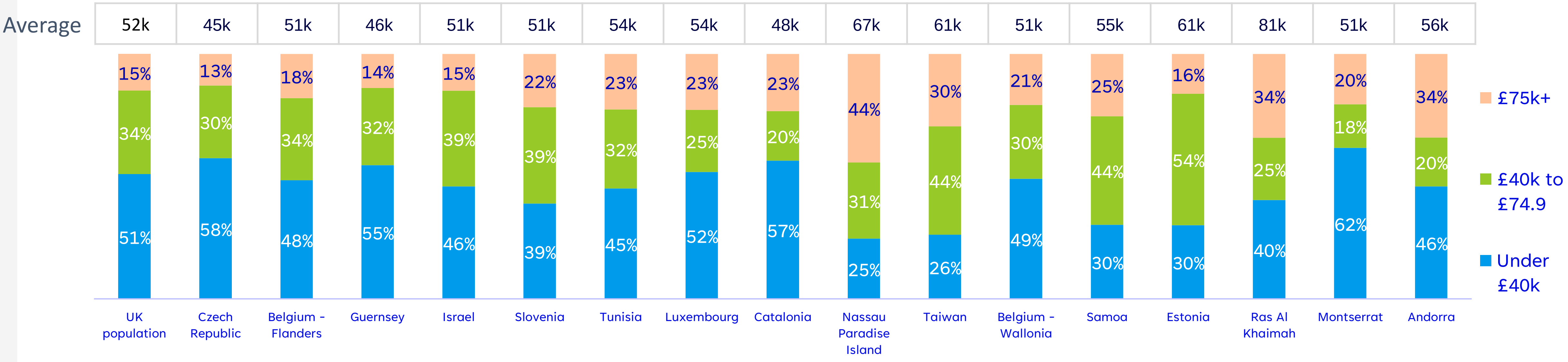


Base sizes: Treat with caution

Czech Republic	Belgium - Flanders	Guernsey	Israel	Slovenia	Tunisia	Luxembourg	Catalonia	Nassau Paradise Island	Taiwan	Belgium - Wallonia	Samoa	Estonia	Ras Al Khaimah	Montserrat	Andorra
53	42	38	36	34	38	34	32	27	30	26	20	24	16	16	19

Household Income by bucket-list destination

Household Income by bucket-list destination



Base sizes: Treat with caution

Czech Republic	Belgium - Flanders	Guernsey	Israel	Slovenia	Tunisia	Luxembourg	Catalonia	Nassau Paradise Island	Taiwan	Belgium - Wallonia	Samoa	Estonia	Ras Al Khaimah	Montserrat	Andorra
53	42	38	36	34	38	34	32	27	30	26	20	24	16	16	19

Sustainability

Sustainability is a concern of the public's but not yet a big driver of decision making

It's a concern…

71%

of the U.K. population are '**very concerned**' about the environment

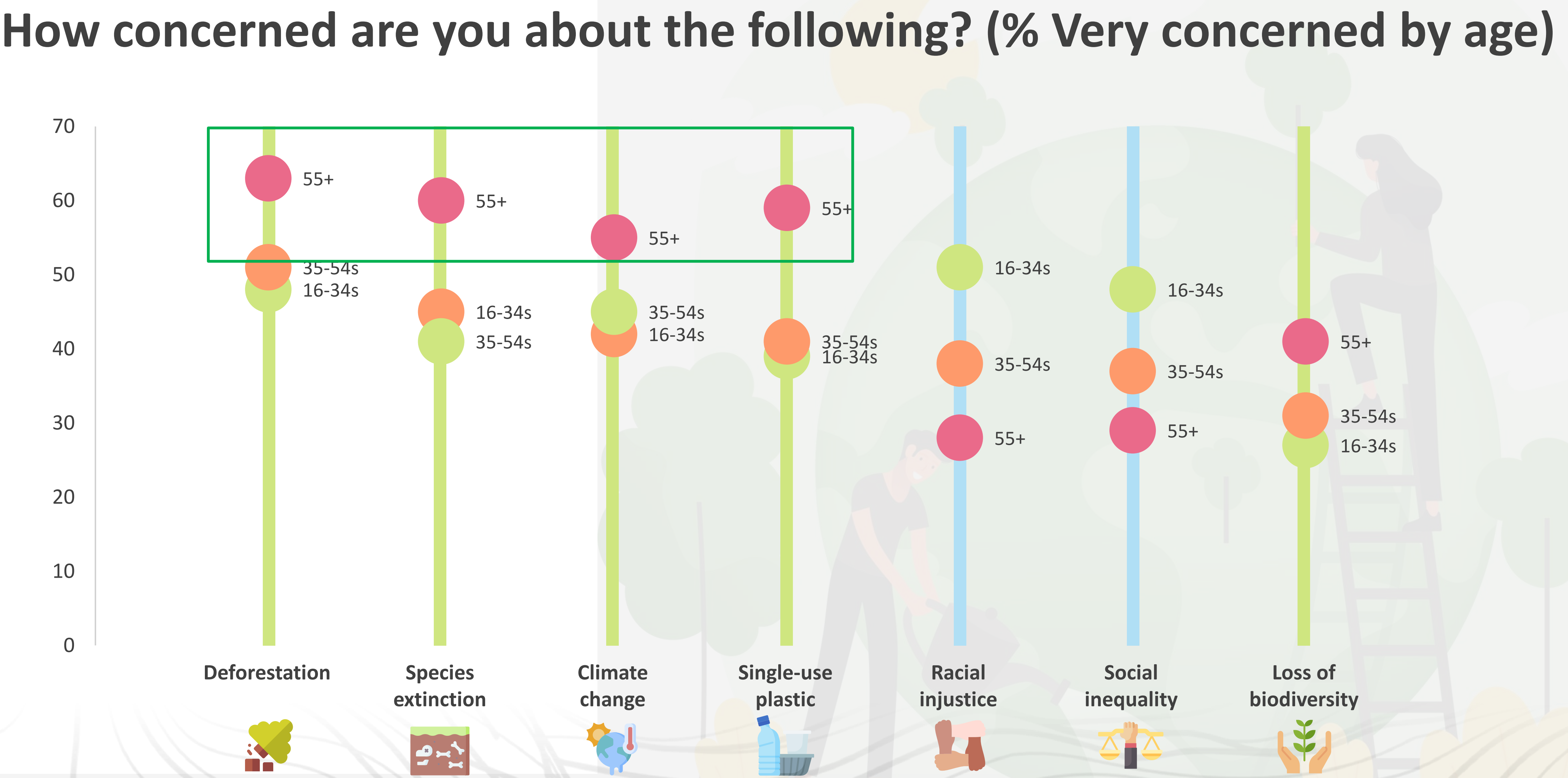
…but not a decision driver

24th

most influential factor in booking a hotel (out of 30) amongst U.K. market

24th	17th	17th	17th	21st

Environmentalism is not just 'a young-person's thing'



Sustainability is not one size fits all…

Eco Evangelists	Good Intentions	Accidentally Green	Affluent Hedonists	Climate Sceptics
"We need to save the world and I'm doing whatever it takes to play my part"	*"I try to be green but it's difficult and pretty overwhelming"*	*"I look after the things I own and turn off the lights. If that makes me green, then so be it"*	*"Life is about enjoyment and experiences – I'm not cutting back on that for anyone"*	*"Climate change is just another way of controlling what we do."*
16	27	19	27	11

ADVOCATES — AGNOSTICS — ANTAGONISTS

Eco Evangelists: Behavioural Strategies

Reciprocity
PROVIDE A SERVICE, GIFT OR HELP TO CREATE A SOCIAL DEBT AND ENCOURAGE OTHERS TO RETURN THE FAVOUR

Fairness
APPEAL TO THE SUBJECT'S SENSE OF JUSTICE OR EQUITY

Changes your organization can make:

- Source and promote local food on menus
- Offer more vegetarian and vegan options
- Stock green essentials for items like toiletries, teas, coffees, etc.

Behaviour changes you can guide your guests toward:

- Booking through alternative sustainable websites
- Attract and cater to domestic/local travelers
- Allow for opt-in on carbon offsetting programs or supporting green initiatives like reforesting or wild flower planting

Good Intentions: Behavioural Strategies

Default
PRESENT A CHOICE WHERE THE PRE-SELECTED OPTION IS THE DESIRED BEHAVIOUR

Easiness
MAKE THE DESIRED BEHAVIOUR THE EASIEST OPTION REQUIRING THE LEAST EFFORT

Changes your organization can make:

- Make recycling easy and visible – and actually recycle!
- Install towel racks to make re-using towels simple
- Install a faucet/fountain so filling water bottles easy and expected

Behaviour changes you can guide your guests toward:

- Pack light, reframe luggage limits as not simply about cost, but also impact
- Reusing linens and towels, perhaps with an incentive
- Make non-essential items on a by-request basis

Affluent Hedonists: Behavioural Strategies

Transmitter
CHOOSE THE RIGHT MESSENGER TO CONVEY THE MESSAGE

Ego
REINFORCE SELF-IMAGE BY RECOGNISING AND REWARDING BEHAVIOUR

Norms
USE THE POWER OF SOCIAL CONFORMITY TO ENCOURAGE THE DESIRED BEHAVIOUR

Changes your organization can make:

- Choose the right transmitter to promote your brand with sustainability in their messaging
- Install or highlight electric car charging stations within reach of your property or attraction, provide bikes or scooters
- Upgrade to automatic thermostats and lighting systems that cater to the guest without effort

Behaviour changes you can guide your guests toward:

- Guide passengers to direct flights
- Highlight local fine dining establishments with local suppliers
- Promote local shops & boutiques with eco-friendly products

Closing thoughts

Closing thoughts

1

All of the indicators suggest overseas travel is set to grow in 2024, with trips approaching pre-pandemic levels. This growth is driven predominantly by older members of the public who appear to be regaining their confidence around international travel. Spain continues to be the leading destination, but there have been notable increases in intentions to visit Greece and Cyprus. This may be driven by their package holiday status (see point 2) but – at least in Greece's case – may also be linked to the limited closures during the pandemic.

2

Despite positive indicators, cost-of-living is still front of mind and there is limited evidence of people thinking they will emerge any time soon. Concerns around finances mean that people are more likely to book package holidays through travel operators than before the pandemic. These trip types involve fewer hidden or unexpected costs, and are resorted to when finances are unpredictable.

3

People are still dreaming of bucket-list destinations which differ markedly from regular holiday destinations. Many ANTOR members fall into the bucket-list category, which has a number of implications – not least in terms of researching, planning and booking lead times, which can start years in advance. ANTOR members should consider the bucket-list travellers when designing campaigns and advising on trip itinerary lead times

4

Sustainability is front of mind but not driving trip choice for the majority. That said, sustainability is not one size fits all – some are passionate and do make choices with sustainability in mind (Eco Evangelists), others want to make sustainable choices but struggle (Good Intentions), whilst some will be sustainable if it makes them look good (Affluent Hedonists). Destinations should seek to appeal to each of these when making sustainable choices.

Thank you!

Methodology

ClearSight on UK International Holiday Trends deploys data collected by BVA BDRC in its monthly consumer tracking research.

The data collection methodology is an online survey, with a 'per wave' sample of approximately 1,750 with waves grouped together to increase base sizes.

The data is weighted to be representative of the UK on age, gender, region and social grade.

Comparisons are made to previous similar surveys but should be looked at indicatively only due to slightly different methodologies.

Explaining statistical significance

As the survey is conducted with a sample of the target audience, we cannot be 100% certain that a census of the whole population would yield the same results.

We can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure.

The percentages within the table represent the error variance on incidence percentages.

	Survey finding of…		
Base	**5 / 95%**	**20 / 80%**	**50 / 50%**
Total Sample *(1,757)*	+/- 1.0%	+/- 1.9%	+/- 2.3%

BVA BDRC – Quality & Accreditations

BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

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