

Holiday Trends 2015



Introduction

The BDRC Continental Holiday Trends report examines the latest holiday behaviours and attitudes, with a focus upon identifying emerging trends.

The report includes up-to-date information on emerging destinations, booking habits and accommodation favourites, both overseas and within the UK.

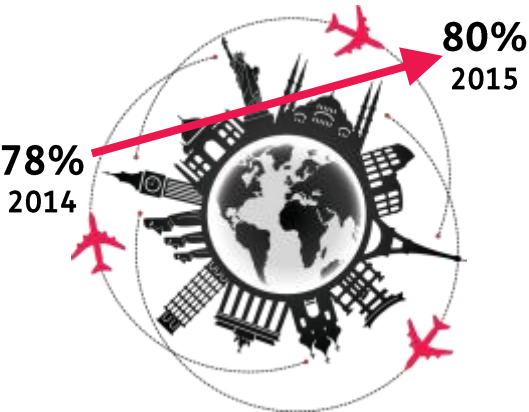
With digital media ever increasing in its importance at each stage of the holiday process, from inspiration through to experience review, the report also has a strong focus in this area. The changing roles of social media, online review sites and mobile communications each come under the spotlight.

Survey details

The BDRC Continental Holiday Report 2015 is based upon up-to-date primary research among a national sample of 1009 UK adults aged 20 to 64 years. All were interviewed online in January 2015. The sample interviewed reflects the demographic profile of UK adults aged 20 to 64 years who are online. The data was weighted at the analysis stage to reflect the UK adult online population profile.

Key holiday trends in pictures

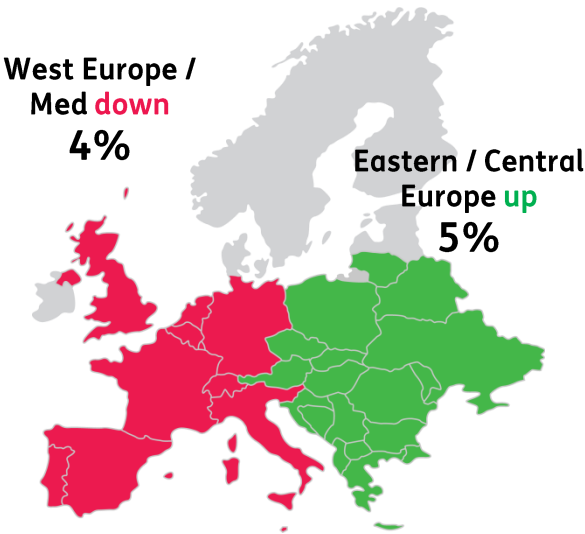
Intention to holiday overseas has risen for the 3rd year in a row



Long haul destinations driving overseas increase



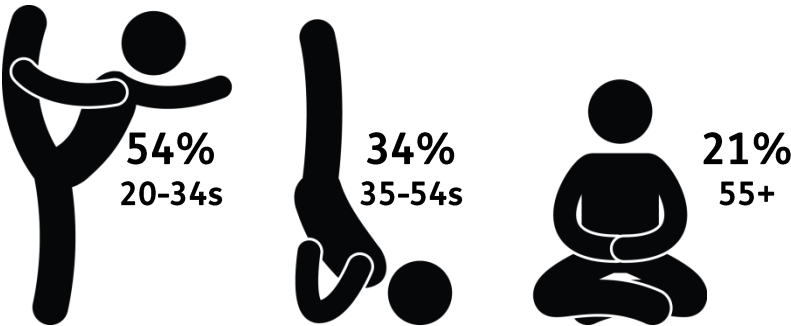
New Europe making a charge



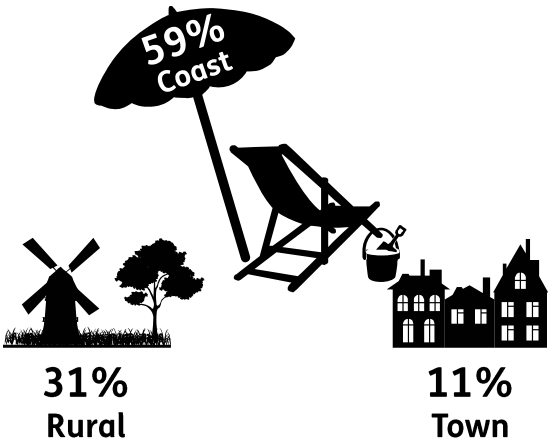
40% of Britons have taken a wellness holiday



Wellness driven by younger generation

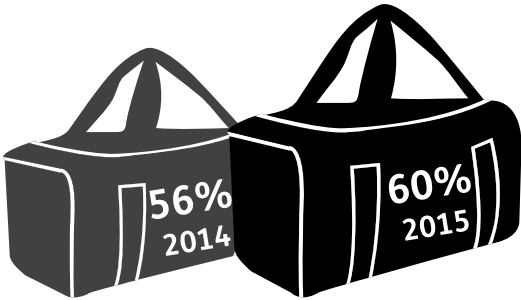


UK coast most appealing Wellness destination

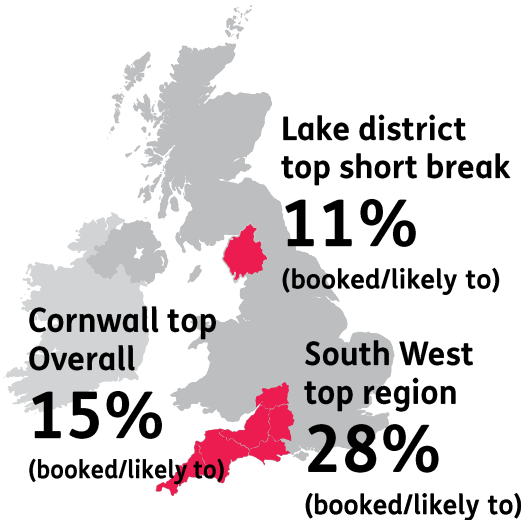


Domestic tourism in pictures

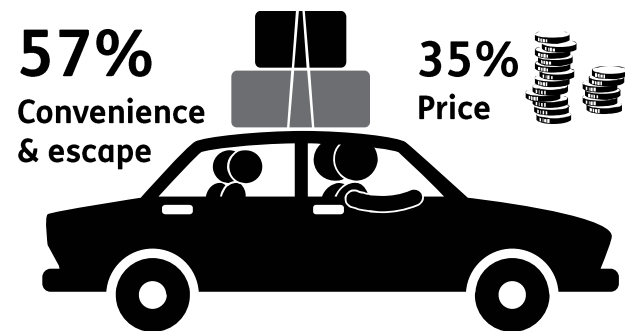
UK short breaks have bounced back



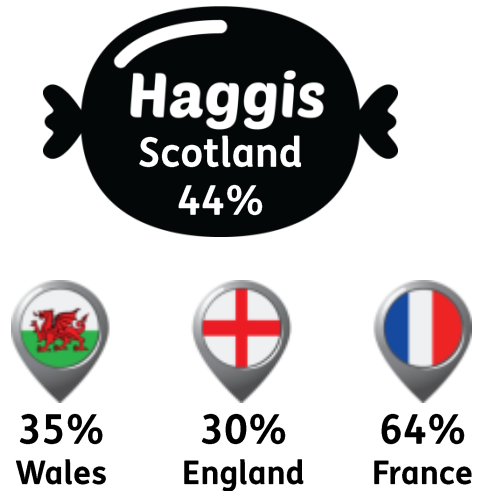
Top domestic destinations



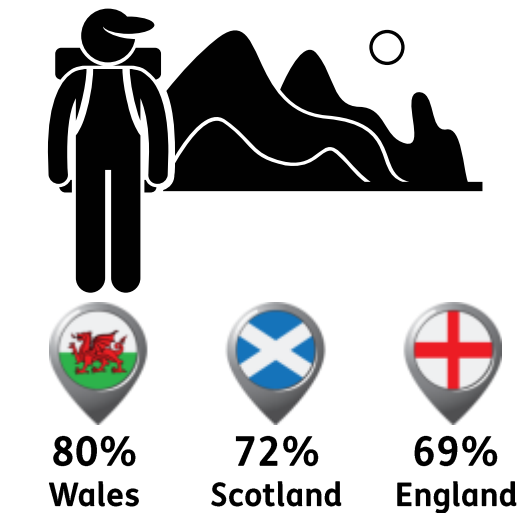
Convenience & escape biggest driver of staycation rise, not cost



UK scores low on provenance although Scotland does best



Natural environment biggest pull for each home nation



Top Holiday Trends for 2015

Holiday ambitions and spend on the rise

4 in 5 Britons are expecting to spend more or the same amount of money on their holidays in 2015, a rise on 2014. Rising financial confidence is supported by the consideration of more holiday options, particularly long haul, emphasising the need for destinations to remain top-of-mind. Marketing remains central to achieving this, influencing 1 in 4 Britons' most recent holiday decision. Role of social media also increasing, particularly amongst the younger generations.

Overseas holidays up but not to traditional destinations

Intention to holiday overseas has risen for the third consecutive year but trips to traditional Western Europe/Mediterranean countries are set to decline. The overseas rise is led by adventurous long-haul destinations such as USA/Canada, Central/South America, Asia and Australasia. Alternative short-haul locations such as Eastern and Central Europe are also set to rise in popularity.

Generation Y leading the breakaway

The rise in consideration of more adventurous destinations is led by Generation Y (20-34 year olds). Driven by their use of social media and a fear of missing out, they are the more 'experience-hungry' age group. Social media check-ins and photo sharing present a constant stream of holiday possibilities and the quest to stand out becomes more competitive. Tellingly, Generation Y are most likely to holiday in the UK because it's cheaper, unlike older generations who do so because of the UK's appeal. The onus is on traditional destinations to communicate what 'tick-box' experiences they have to offer.

Longer planning and stay

The predicted rise in long haul holidays means that the lead time between booking and travelling has increased, as has the expected length of holiday. Holidays to North America require the most amount of planning (5.1 months), over a month more than holidays to the UK (4.1 months). Destinations seeking to compete with long-haul will need to schedule their marketing accordingly.

UK main holidays have dropped short breaks have bounced back

Intentions to take a main holiday in the UK have continued to fall, although not to the extent witnessed in 2014. Reassuringly for the UK holiday market, intentions to take a domestic short break have increased and make up the vast majority of all UK holidays. The prevalence of short breaks means that venues and attractions need to promote themselves as must-see to avoid being overlooked by time-pressed holiday-makers.

Top Holiday Trends for 2015

UK holidays are hassle free

'Less hassle to organise' was the most popular reason given for choosing a UK holiday over a holiday overseas, not cost. 'Not enough time to go abroad' was also cited. This matches research elsewhere which paints a picture of an increasingly time-pressured and impatient society, who when faced with dozens of reviews and booking options, opt for the path of convenience. For outbound operators the onus should be on simplifying the booking and research process. For the domestic market it is important to communicate the ease and familiarity of staying at home.

Staycation legacy of improved perceptions of UK offer

The staycation has left a legacy of improved awareness of the UK's offer, almost half citing this as a reason for increasing their holidaying in the UK. This is testimony to the work conducted by the UK's 'Visits' as well as by individual destinations. It also suggests that an improved financial situation won't necessarily lead to a drop in domestic holidays. The overriding reason for Britons taking a domestic holiday is 'the natural environment', with Wales leading the way.

Provenance an area for development

Our research elsewhere highlights the growing importance of provenance (local experiences and produce) in driving holiday choices and experiences. The UK scores relatively low in this area compared to other countries. Whilst this is to be expected given the familiarity of what is on offer, Scotland does significantly better than the other home nations. Their 'Meet the Scots' campaign draws on typical Scottish experiences and is a good example for others to follow.

Wellness tourism to boost the UK coastline

According to research by SSI, wellness tourism is growing twice as fast as tourism generally. This report reveals that 2 in 5 Britons have taken a wellness holiday, with Generation Y overwhelmingly most likely to have done so. The UK coast is regarded as the most suitable setting for a UK wellness holiday, providing a perfect opportunity to rejuvenate struggling coastal towns. The wellness findings are in line with other research we conducted with the National Coastal Tourism Academy (NCTA) in 2015 (more info on their website <https://microsites.bournemouth.ac.uk/destinationfeelgood/>)

Wellness includes any health-enhancing activity, not just spa and body treatments. Many destinations already provide this, and will just need to change the tone of their communications. Others who wish to get on board should ensure they provide adequate facilities. Local and responsibly sourced food, knowledge of the local countryside and provision for bicycles are a must.

Top Holiday Trends for 2015

Review sites continue to be influential in Holiday-booking behaviour

Review sites have an increased influence on bookings in 2015, with 7 in 10 using online reviews to help decide the holiday destination for at least some of the holidays they take. Review sites are relatively age neutral, with similar influence across generations. There has been a slight increase in the perception of trust and accuracy of online review sites, although this has remained fairly constant since 2014.

Social media influence on holiday bookings has increased

Nearly one third of all Britons are influenced by some form of social media in their holiday decision-making, rising to half amongst 20-24 year olds. Social media sites are a growing influence in selling an experience, particularly Facebook and Instagram which can use imagery to create an emotional connection. User-generated promotion is also important. Around half use social media on their phone on their holiday with nearly 2 in 10 uploading photos. Notably social media use is not restricted to younger generations with a fifth of adults aged 55+ also influenced by this medium. Destinations should encourage check-ins, photo opportunities and offer free wifi to facilitate the process.

Digital detox counter-movement?

Interestingly, the proportion using a smartphone on their last main holiday has decreased across all age groups, most notably amongst adults aged 35yrs+. This may relate to the emerging 'digital detox' trend while on holiday, where digital devices are surrendered in favour of escaping from the day-to-day. Should venues be offering 'wifi-free' as well as 'free-wifi' zones?

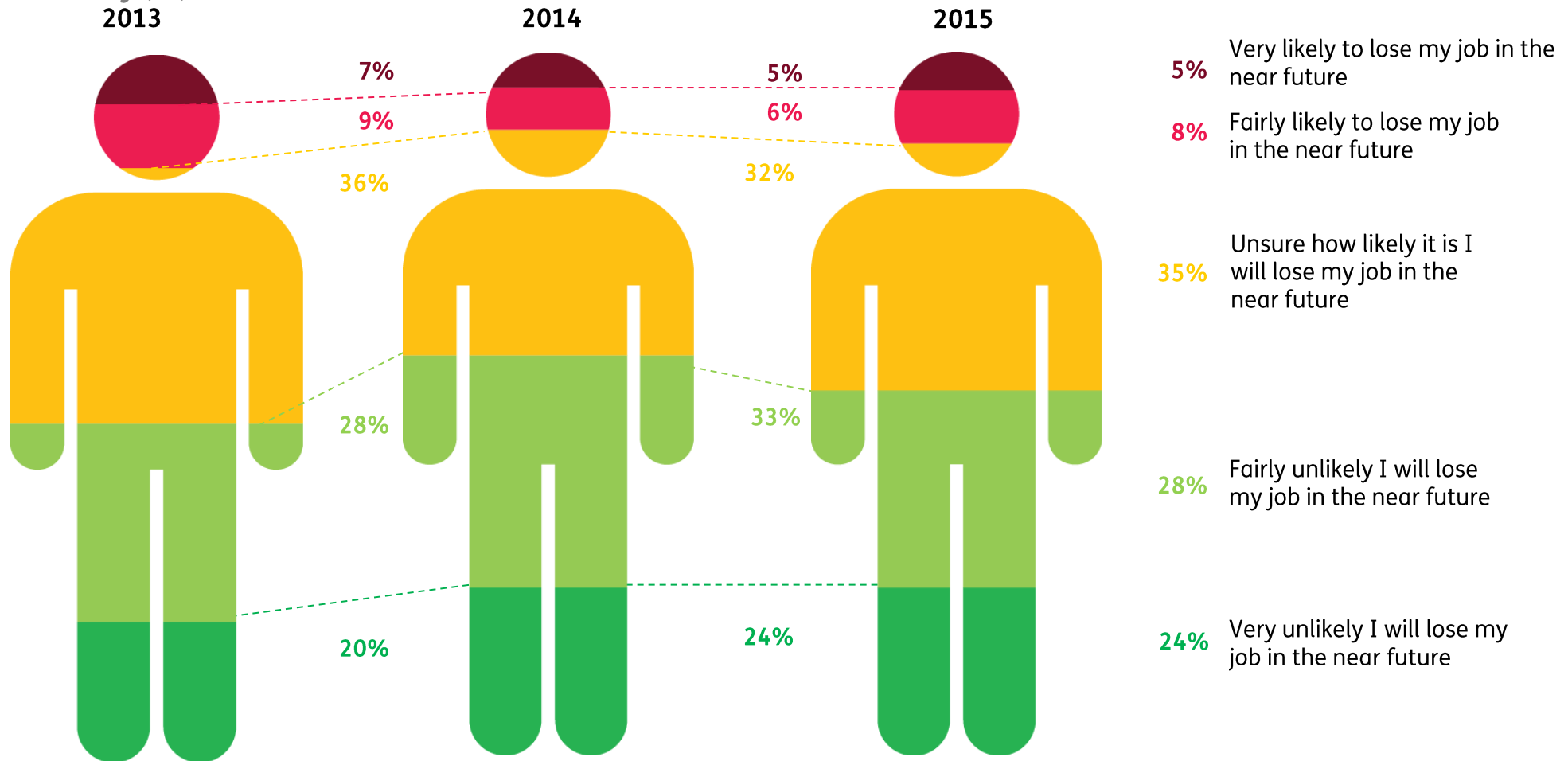
A range of mobile uses

Those who do use their mobile phones on their holiday, do so for a wide range of reasons. The single most common use of smartphones on a holiday is taking photos. Around half use an app, the most common being weather reports, followed by maps. 1 in 5 check their work emails.

Headline tourism intentions

Job security remains consistent with the last two years...

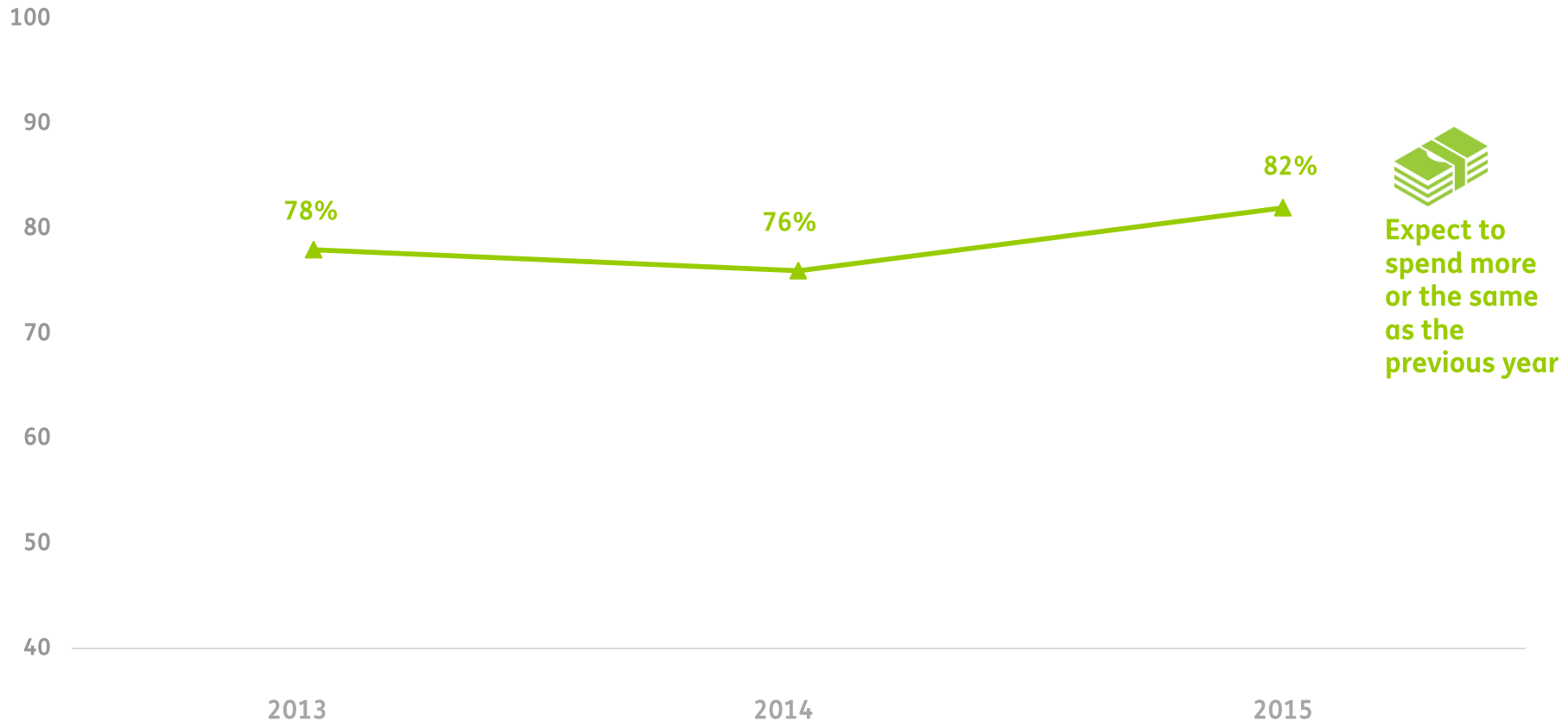
Job security (%)



Which of the following describes how secure you feel in your current job?

...but holiday spending intentions have increased

Holiday spend expectations vs. 2014 (%)



In the next 12 months do you expect to spend more, less or about the same as you spent in the previous 12 month period on all your holiday travel spending?

***Social grade** is a classification system based on occupation and it enables a household and all its members to be classified according to the occupation of the Chief Income Earner. Typically ABC1 households will contain management, professional, students (white collar) and C2DE skilled/unskilled manual workers, state pensioners, unemployed (blue collar)

Increased spending confidence means Britons are ‘seriously considering’ more main holiday destinations

Number of destinations considered



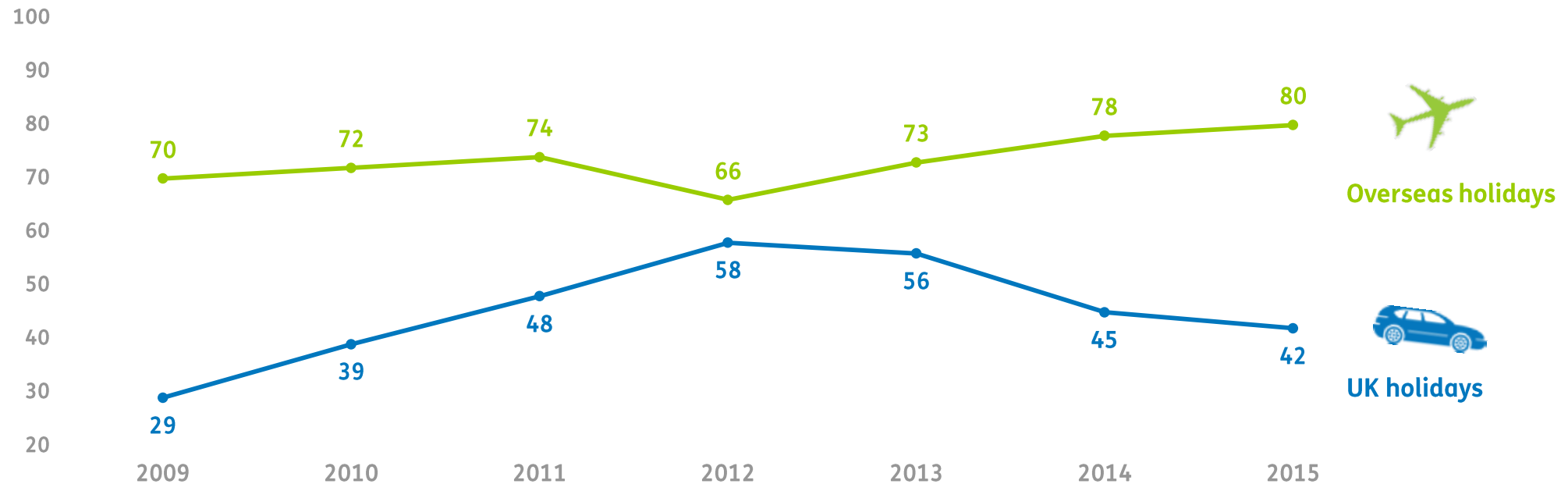
Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

Destinations



Overseas holidays set to increase for the third year in a row. UK main holidays set to drop – but only marginally.

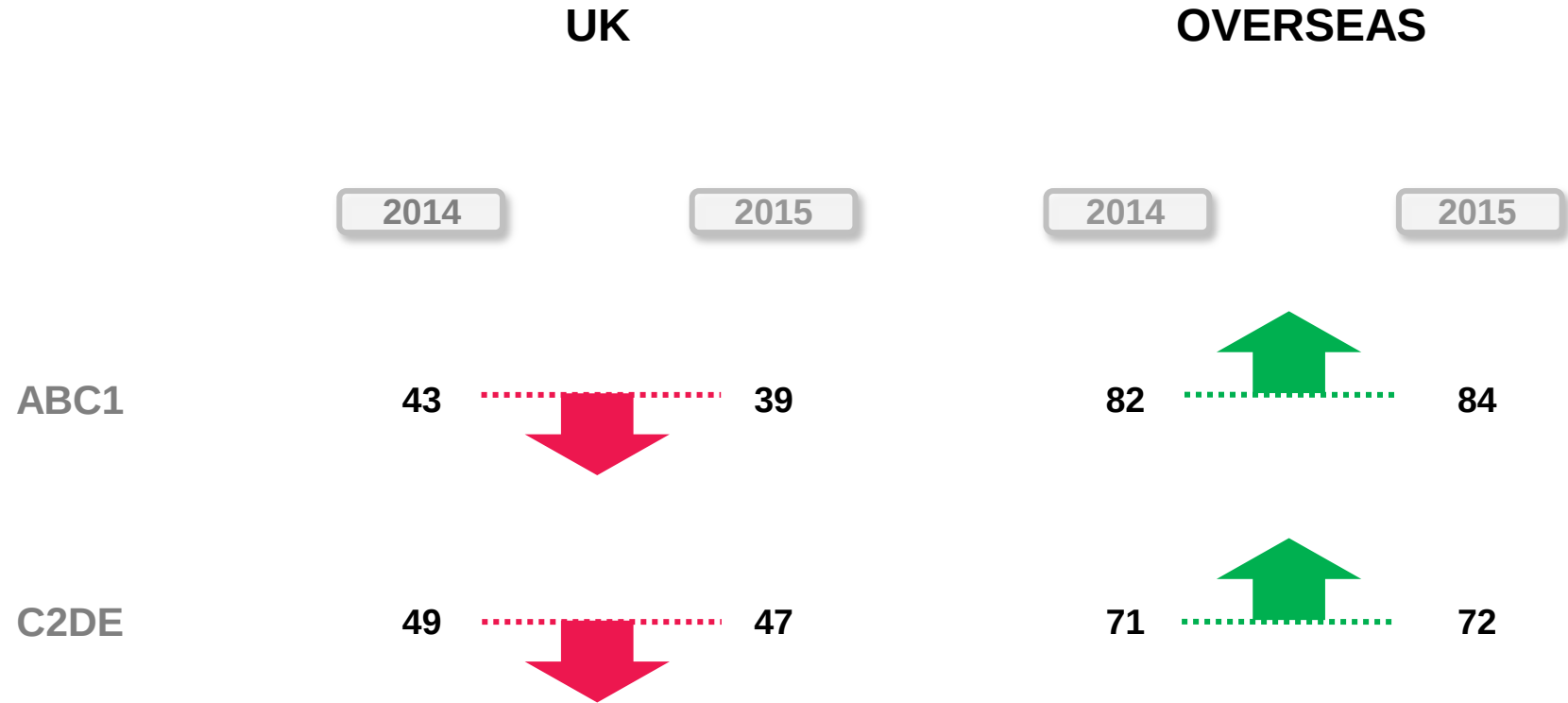
Intended main holidays (4+ nights away from home) (%)



Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

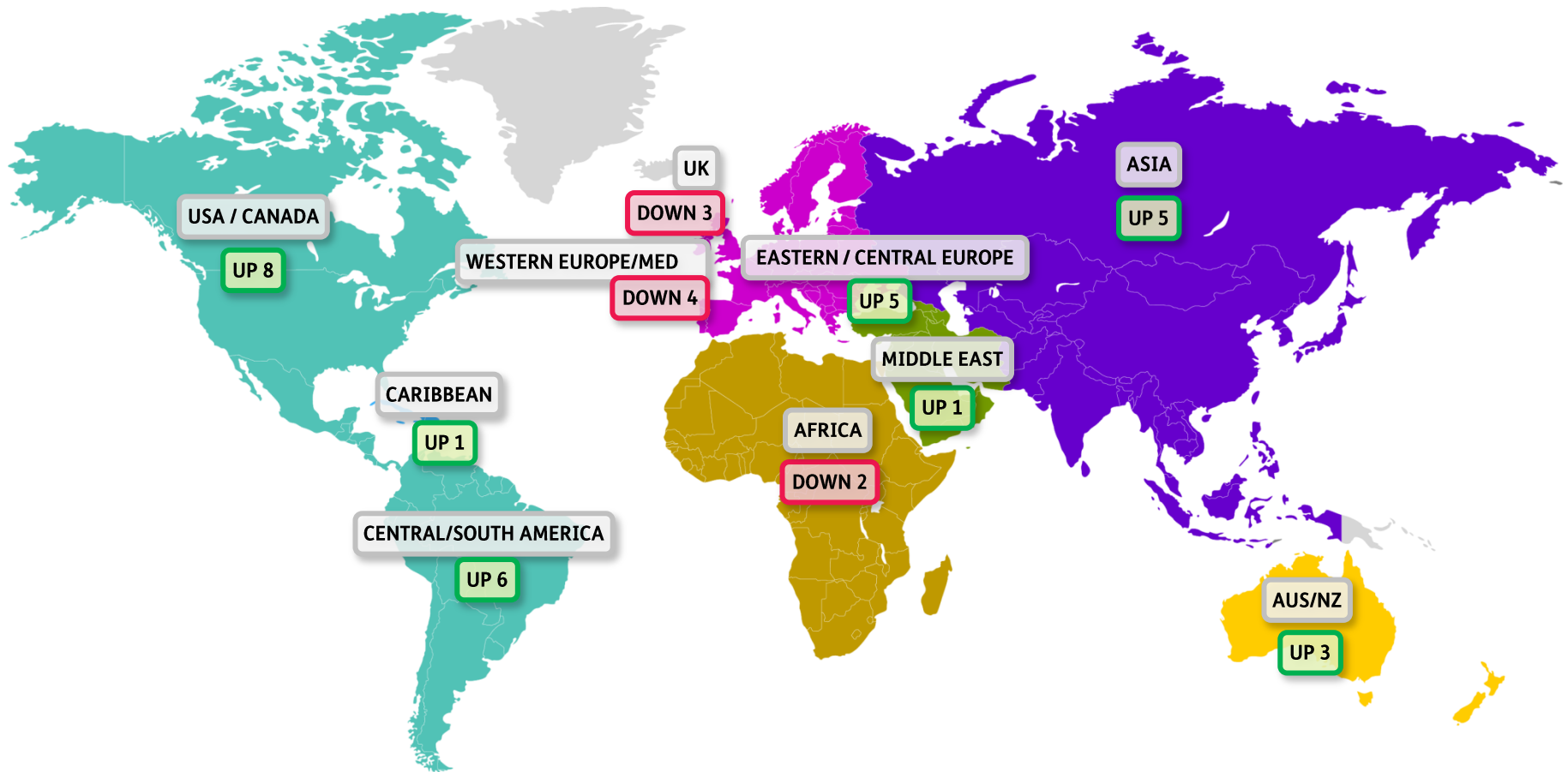
The rise in intention to holiday overseas is consistent across all social grades

Intended main holidays (4+ nights away from home) (%)



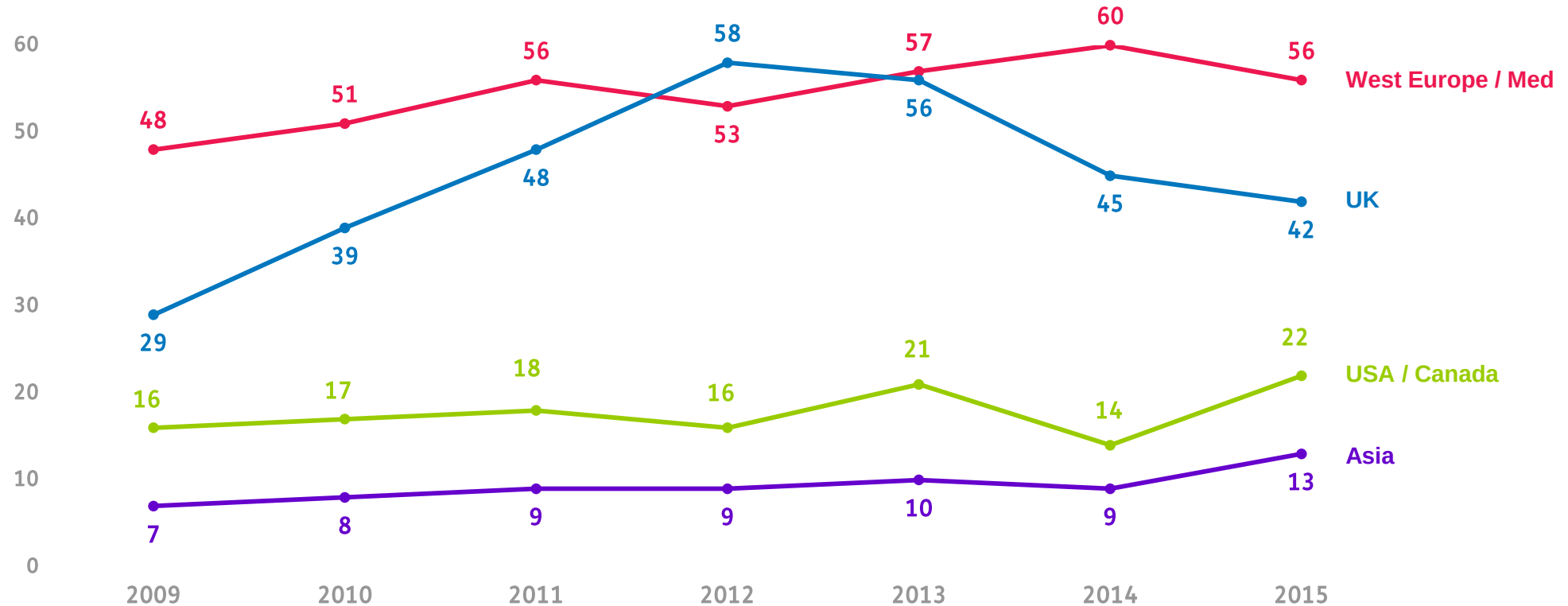
Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?
(Social grade refers to socio-economic group - broadly ABC1 = professionals and students (white collar) C2DE = skilled, unskilled workers, administrative and unemployed)

Main holiday predictions versus 2014 (percentage point movements)



Western Europe/Med remains the most popular region, despite drop. Notable rises for North America and Asia.

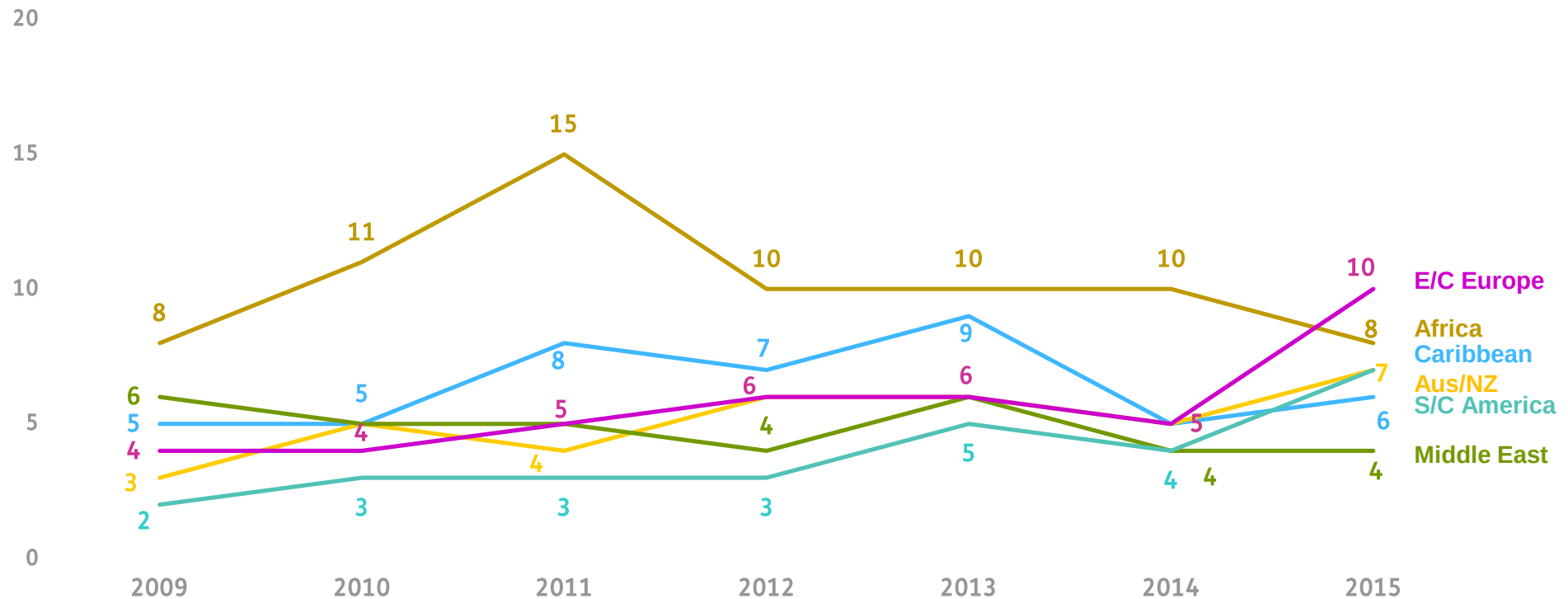
Top regions considered (%)



Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

East and Central Europe the next biggest mover, intention doubling since 2014

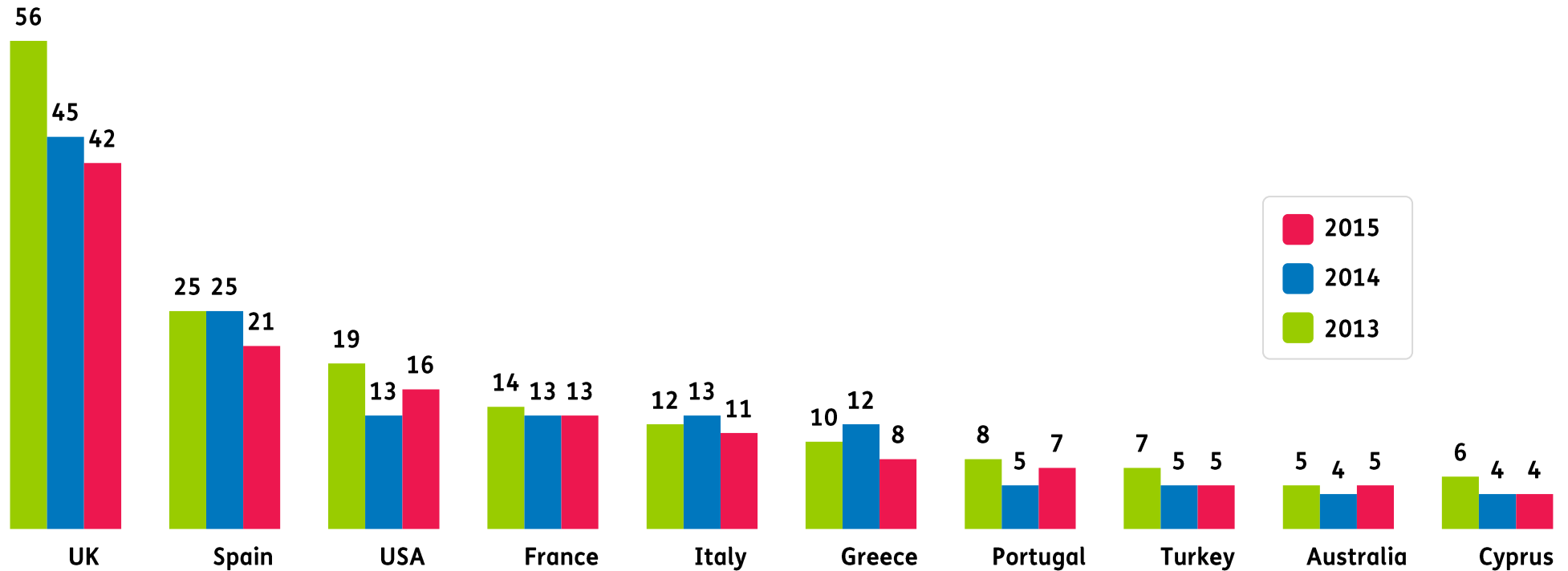
Other regions considered (%)



Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

Spain remains the most popular destination outside the UK. USA only top 6 destination to increase in popularity.

Top destinations considered for 2015 (%)



Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

Generation Y (20-34s) behind the long haul exodus

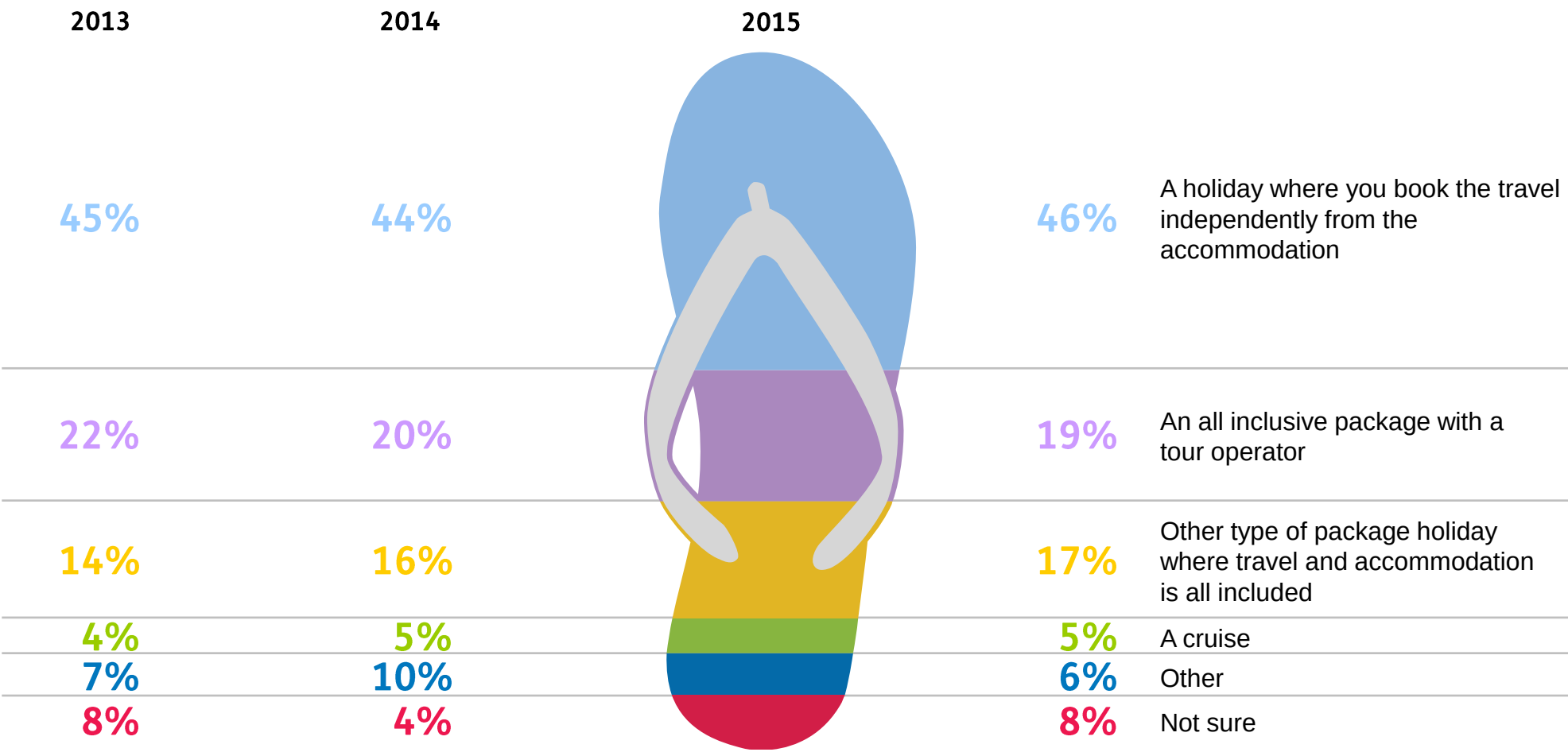
Destination intention by age and social grade (%)

	20-34	35-54	55+	ABC1	C2DE
UK	41	39	50	39	47
Western Europe/Med	56	57	57	56	56
North America	22	25	12	24	18
Asia	18	10	8	14	9
East/Central Europe	17	5	5	9	10
Africa	10	7	5	9	6
Caribbean	9	3	5	7	4
Aus/NZ	10	5	4	7	7
South/Central America	12	5	3	8	6
Middle East	7	3	2	6	2

Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

Consistent with previous years, Britons are most likely to book accommodation and travel independently.

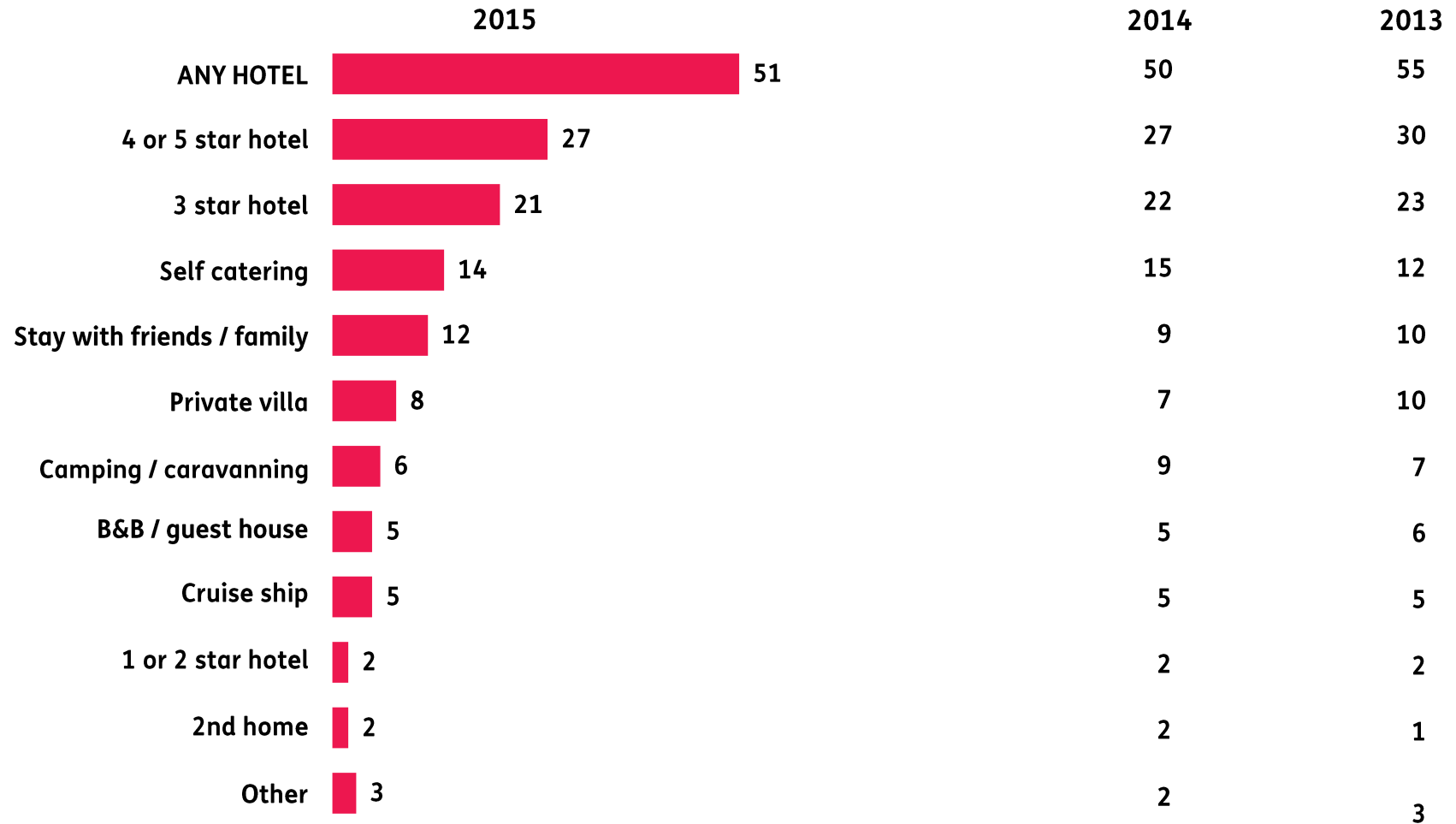
Types of main holiday (%)



Will your main holiday be...?

The type of holiday accommodation has also remained consistent. 4 or 5 star hotels the most popular.

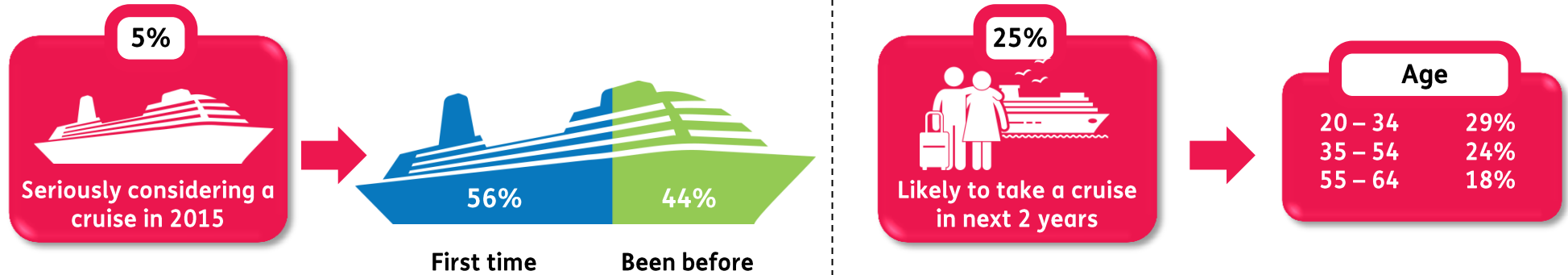
Types of accommodation (%)



And what type of accommodation are you most likely to stay in on your main 2011 holiday?

1 in 4 Britons likely to take a cruise in the next 2 years. Generation Y (20-34s) most open to doing so

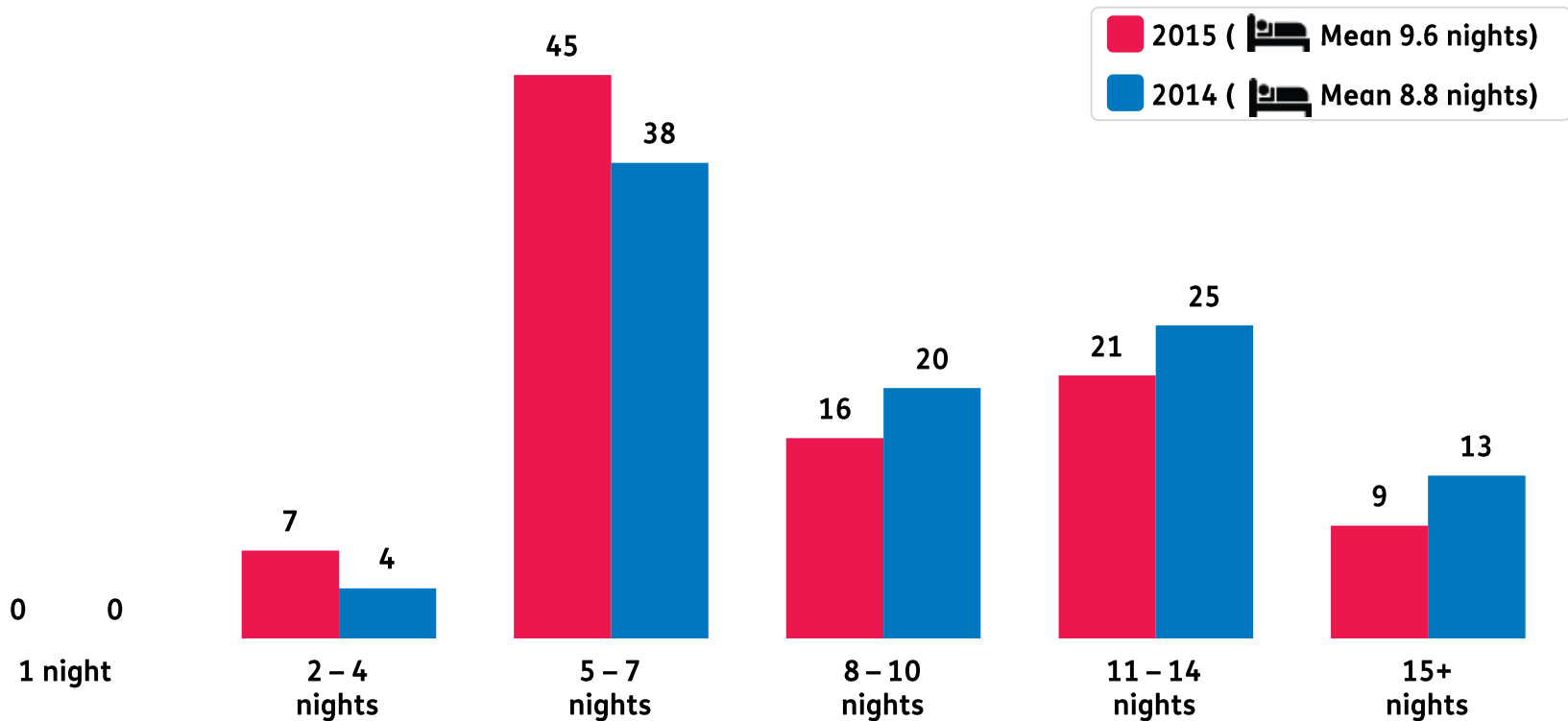
Likelihood of cruise holiday (%)



Will your main holiday be...? Will this be your first cruise holiday or have you been before? Generally speaking how likely are you to take a cruise holiday in the next 2 years?

In line with uplift in long haul holiday intention, the expected holiday length has increased since 2014

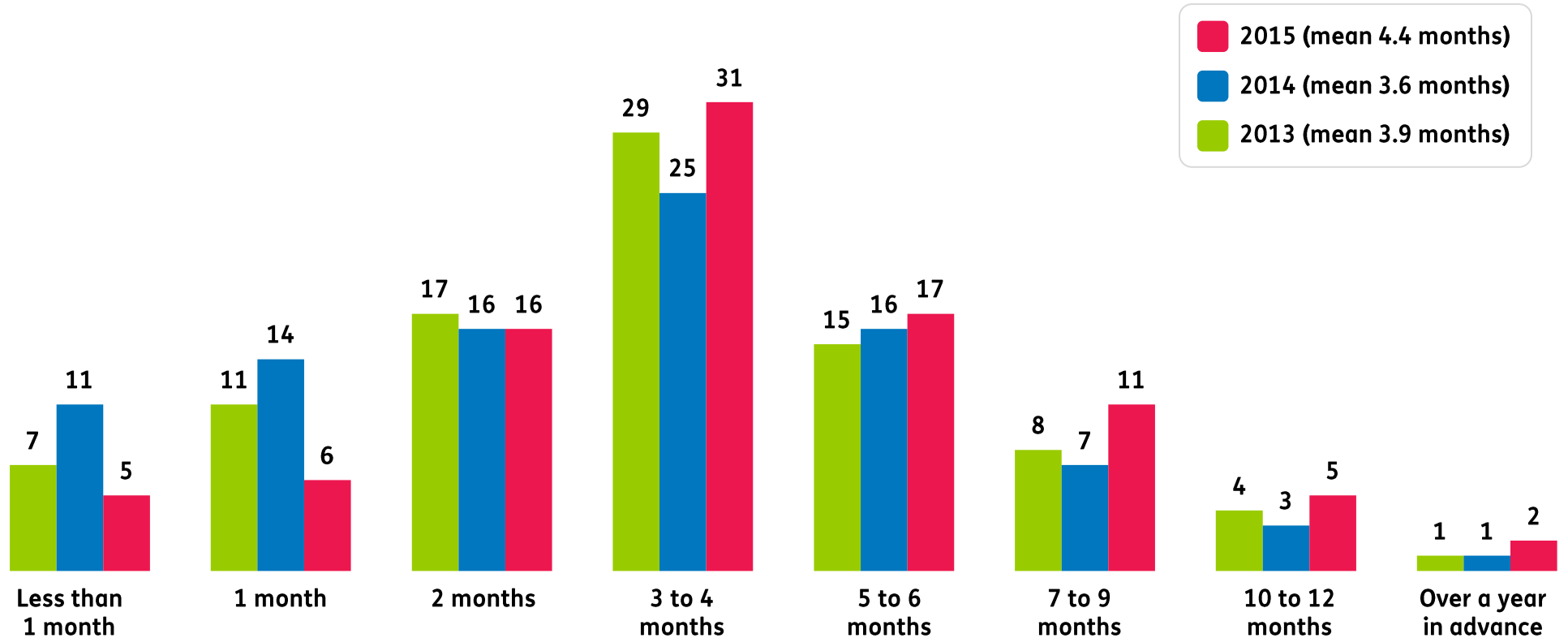
Nights expected to stay on holiday (%)



How many nights away from home do you expect to spend on your next main holiday?

This has knock-on effects on holiday planning time

Lead time between booking and departure (%)



How far in advance will or have you book(ed) your main holiday?

Unsurprisingly, long haul holidays are more time-consuming in terms of planning and trip duration.

Planning, holiday length and accommodation summary by destination

	UK	Western Europe	North America	Asia
Average planning time (months)	4.1	4.3	5.1	4.8
Average length (Nights)	6	9	12	14
Top accommodation choice	 Self catering (25%)	 4 / 5 star (30%)	 4 / 5 & 3 star (27% each)	 4 / 5 star (37% each)

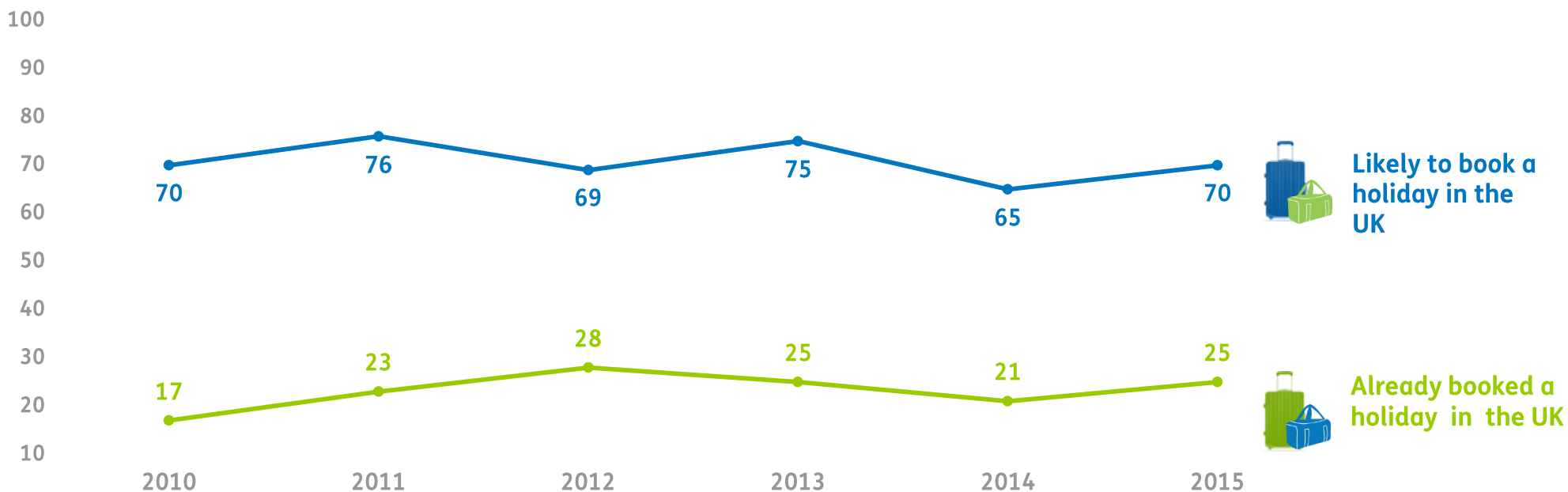
How far in advance will or have you book(ed) your main holiday? / Roughly how many nights do you expect to spend away from home on this holiday? / And what type of accommodation are you most likely to stay in on your next main holiday?

Holidaying in the UK



Reassuringly for the UK market, booking and intention to book a UK holiday have bounced back since last year

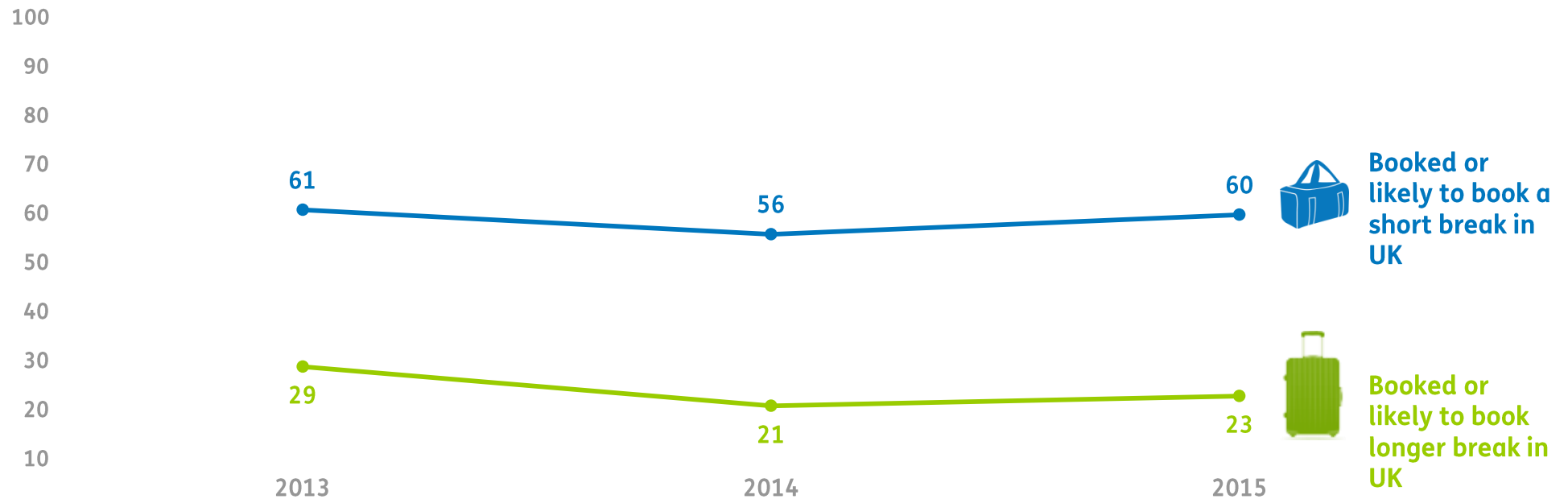
UK short breaks and 7 day holidays intentions (%)



Have you already booked/are you likely to book a main holiday or short break in paid accommodation in the UK?

The majority of predicted UK holidays will be short breaks.

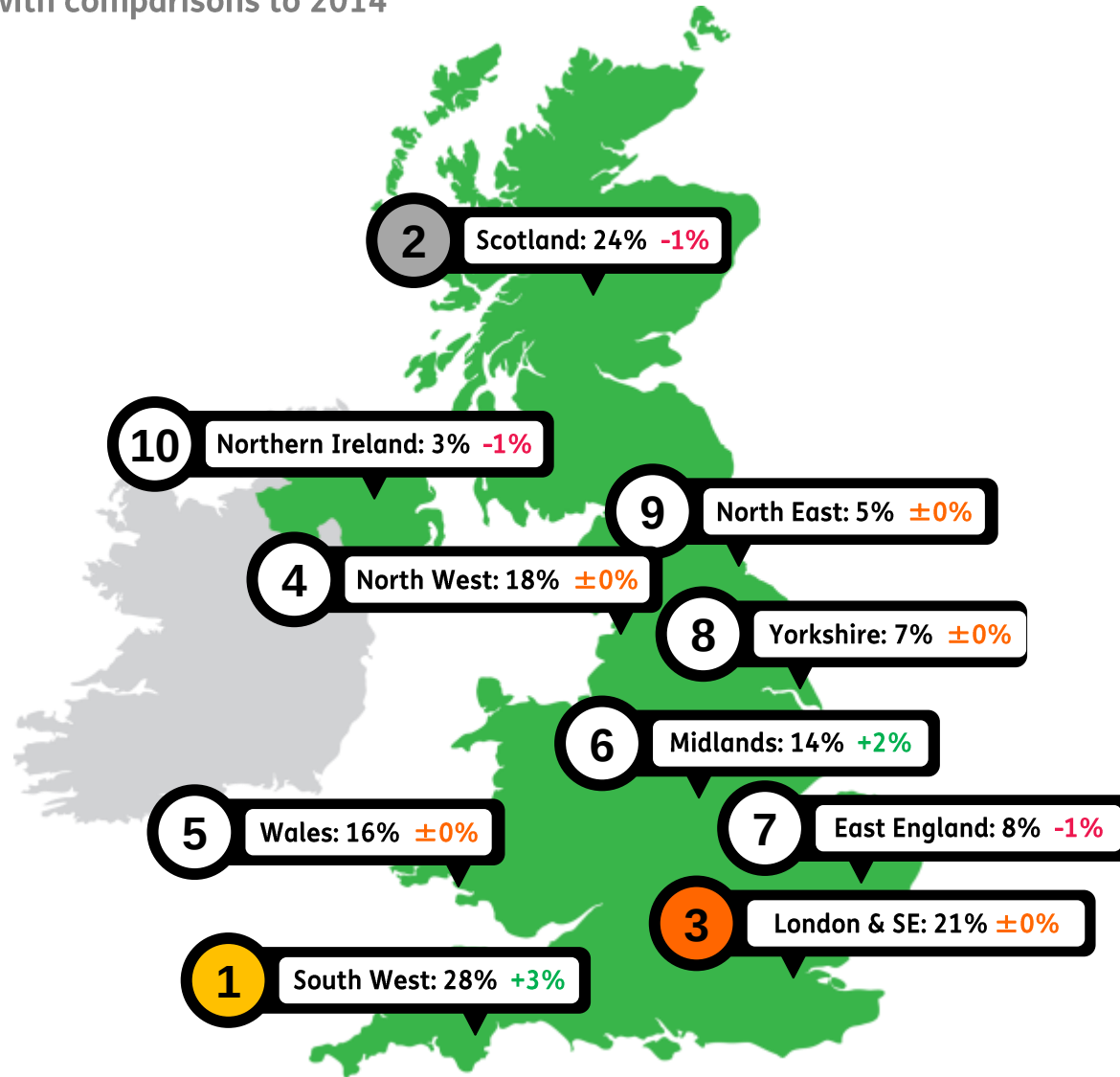
UK short breaks vs. long breaks (last 3 years)



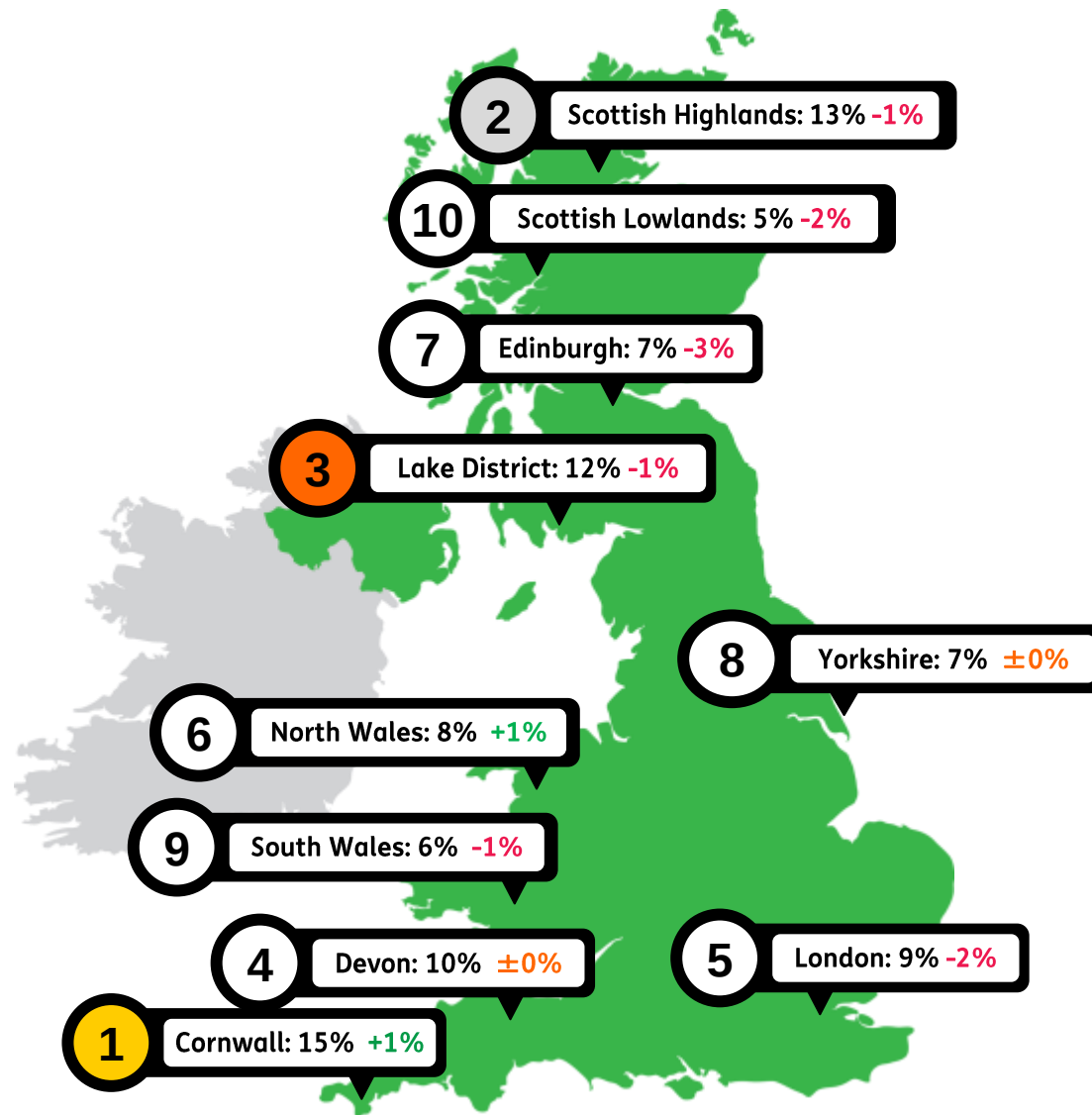
Have you already booked/are you likely to book a main holiday or short break in paid accommodation in the UK?

For the second consecutive year, The South West is the most popular area for a domestic holiday.

Top 10 areas for domestic holidays with comparisons to 2014

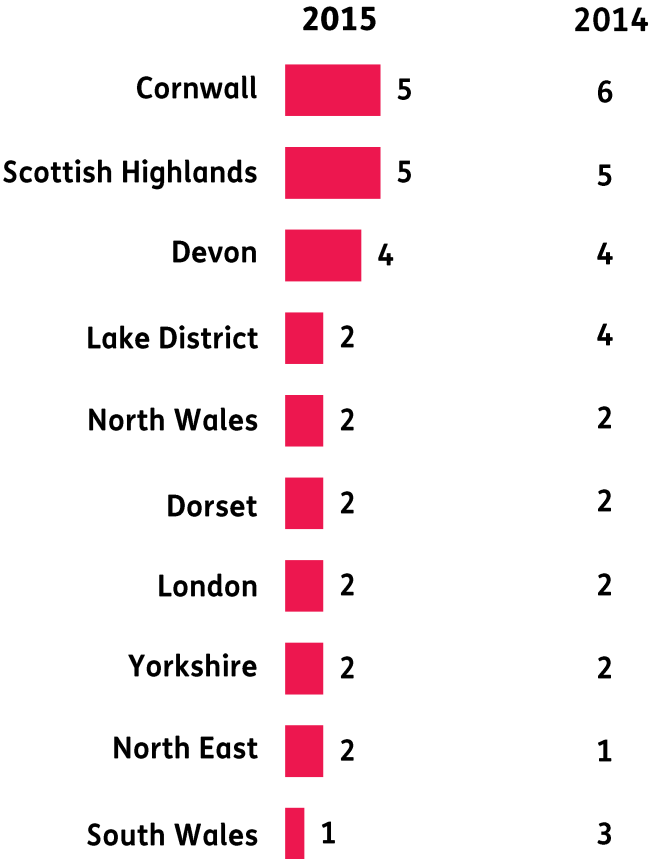


Cornwall is the most popular destination, followed by the Scottish Highlands and the Lake District

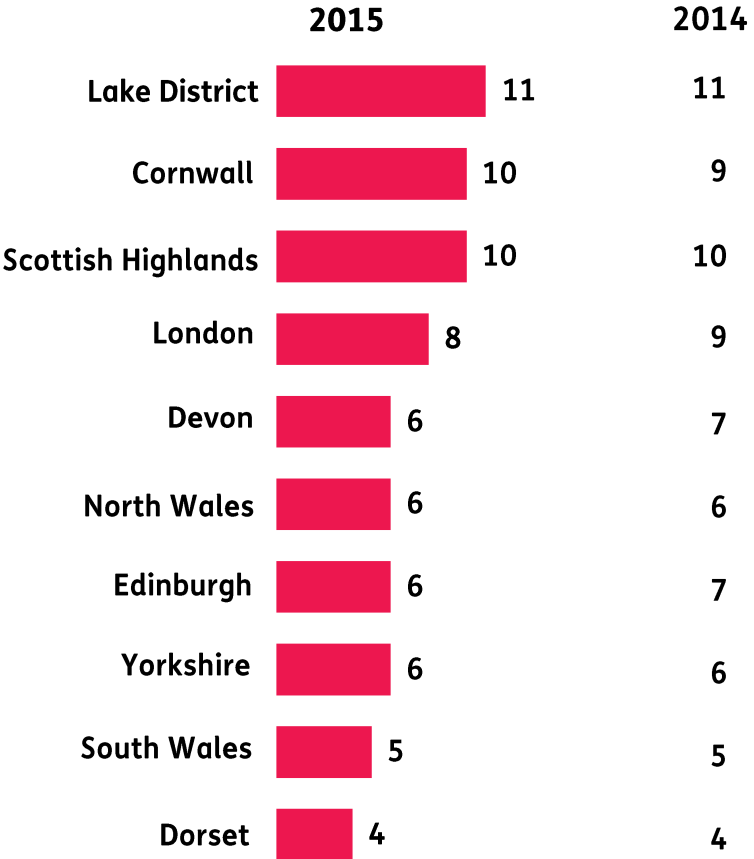


Cornwall top long-break destination and Lake District top short break destination

Top 10 long break destinations



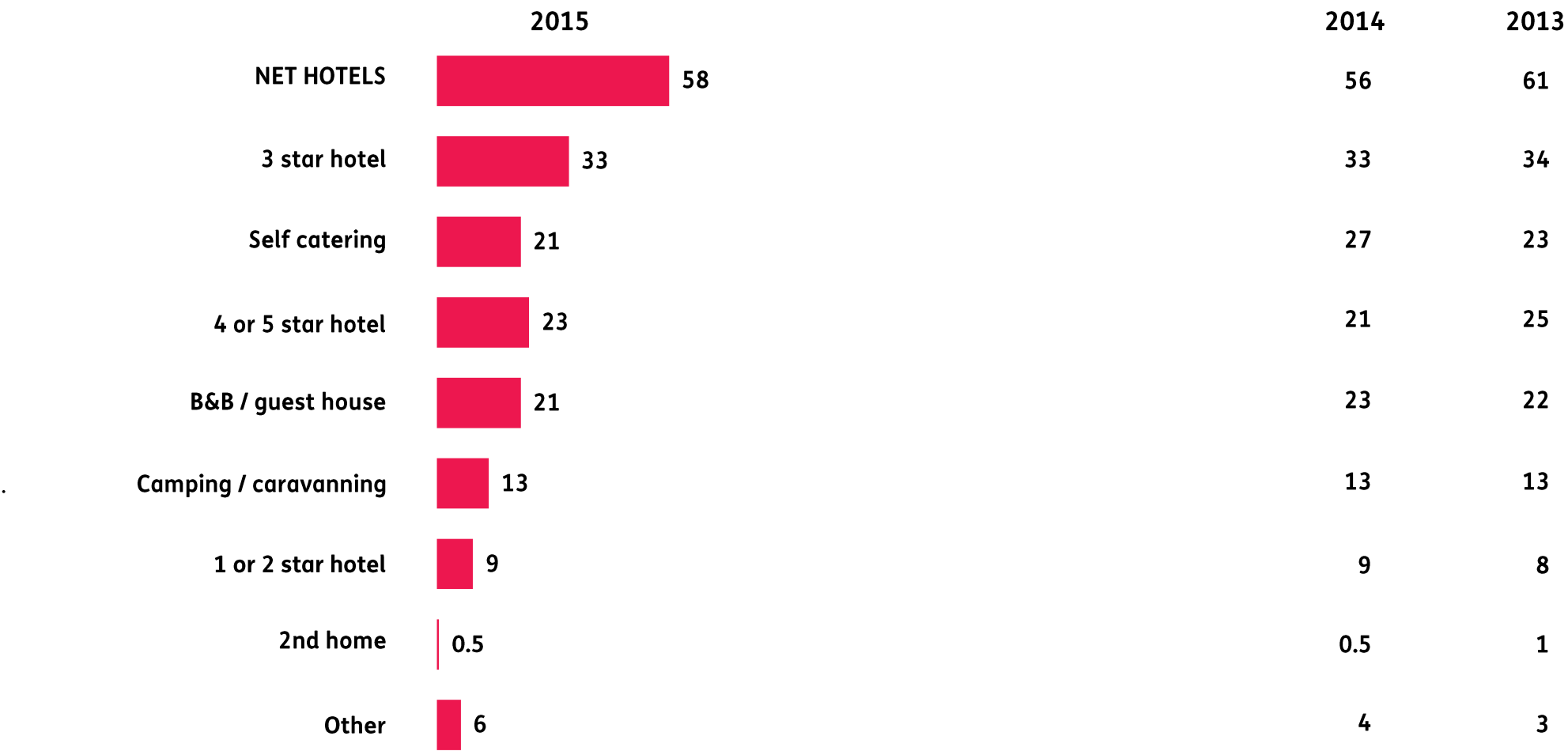
Top 10 short break destinations



Which of these describes where you have already booked/intend to book your UK holiday of 7 nights or more / short break of 1-4 nights?
(All respondents)

3 star hotels remain the most popular type of accommodation for domestic holidays

Accommodation booked / likely to book in the UK (%)



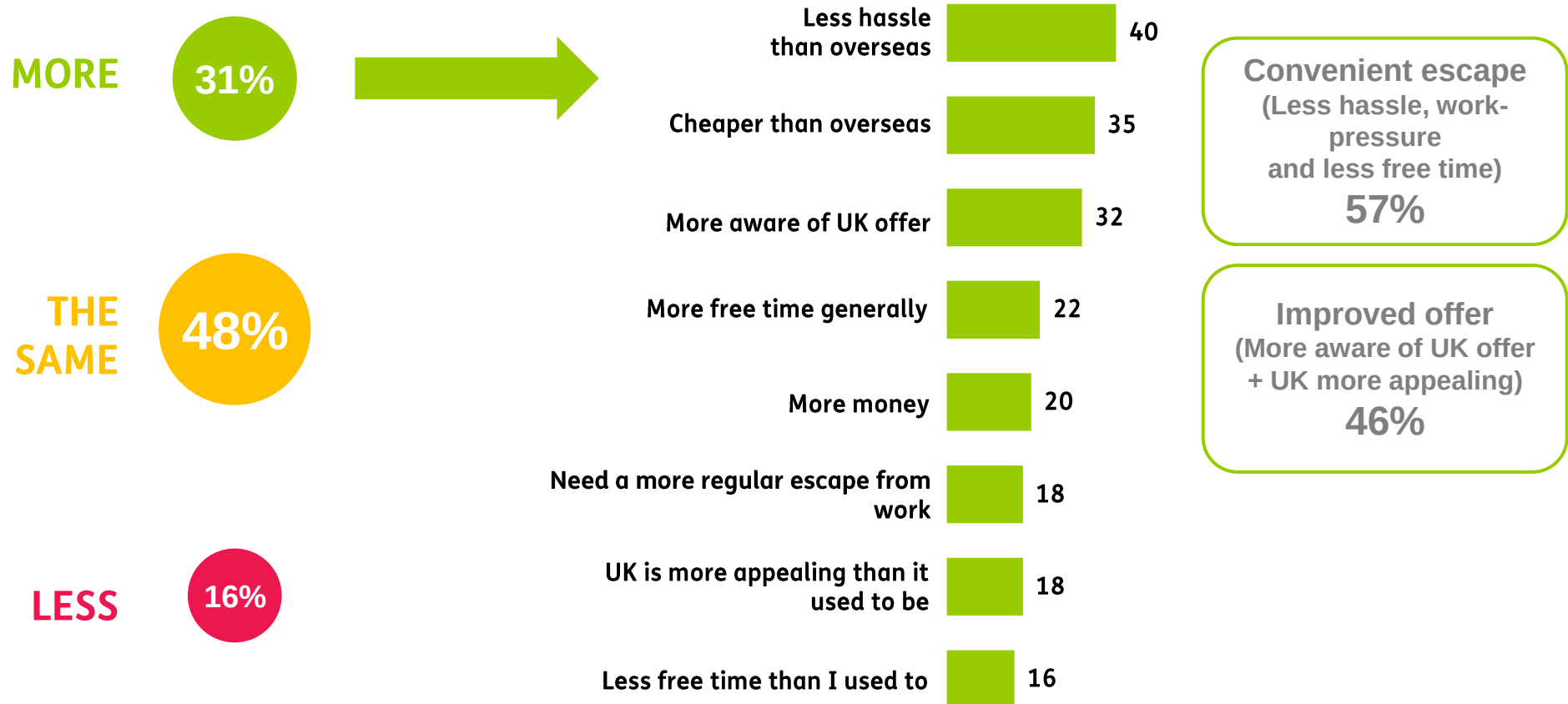
What type of accommodation are you likely to stay in on any of these holidays in the UK?

Showcasing the UK



Convenience, time-pressure, and a better UK offer are more important than cost in the increase in domestic holidays

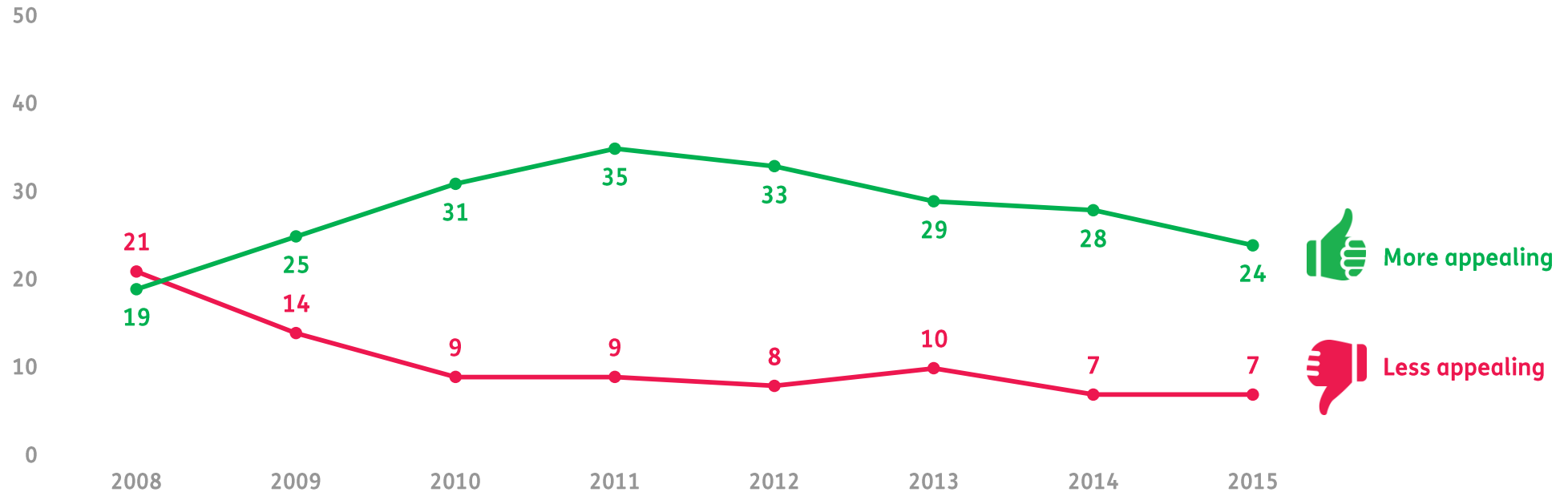
UK holiday patterns in last 5 years and reasons behind them (%)



Would you say you take more or less holidays/short breaks in the UK than you did 4-5 years ago? / For which of the following reasons do you take more (or less) holidays/short breaks in the UK than you did 4-5 years ago? /

However, appeal of the UK is steadily dropping, particularly amongst 20-34 year olds.

UK as destination (% more appealing)



In the last few years would you say the UK has become more appealing or less appealing to you as a destination for either a main holiday or a short break?

UK countries do well for natural environment but other countries steal a march in all-important 'provenance' motivation

Motivations for considering next main holiday by country (%)

						
Natural Environment 	69	72	80	76	49	63
Sights & events 	60	76	56	53	80	72
Social 	49	42	36	30	32	44
Provenance 	30	44	34	66	69	43
R & R 	39	37	37	42	29	35
Self development 	31	37	36	23	36	27
Adventure 	8	12	8	12	13	24
Weather 	6	3	4	39	17	35

Which of these describe why you are visiting or are seriously thinking about visiting (NAME OF COUNTRY) for a short break holiday (1-3 nights away) in the next 12 months? / Which of these describe why you are visiting or are seriously thinking about visiting (NAME OF COUNTRY) for a longer holiday (4 or more nights away) in the next 12 months? / And which one of these describes the most important reason...?

Wellness Tourism: An opportunity for the UK holiday market

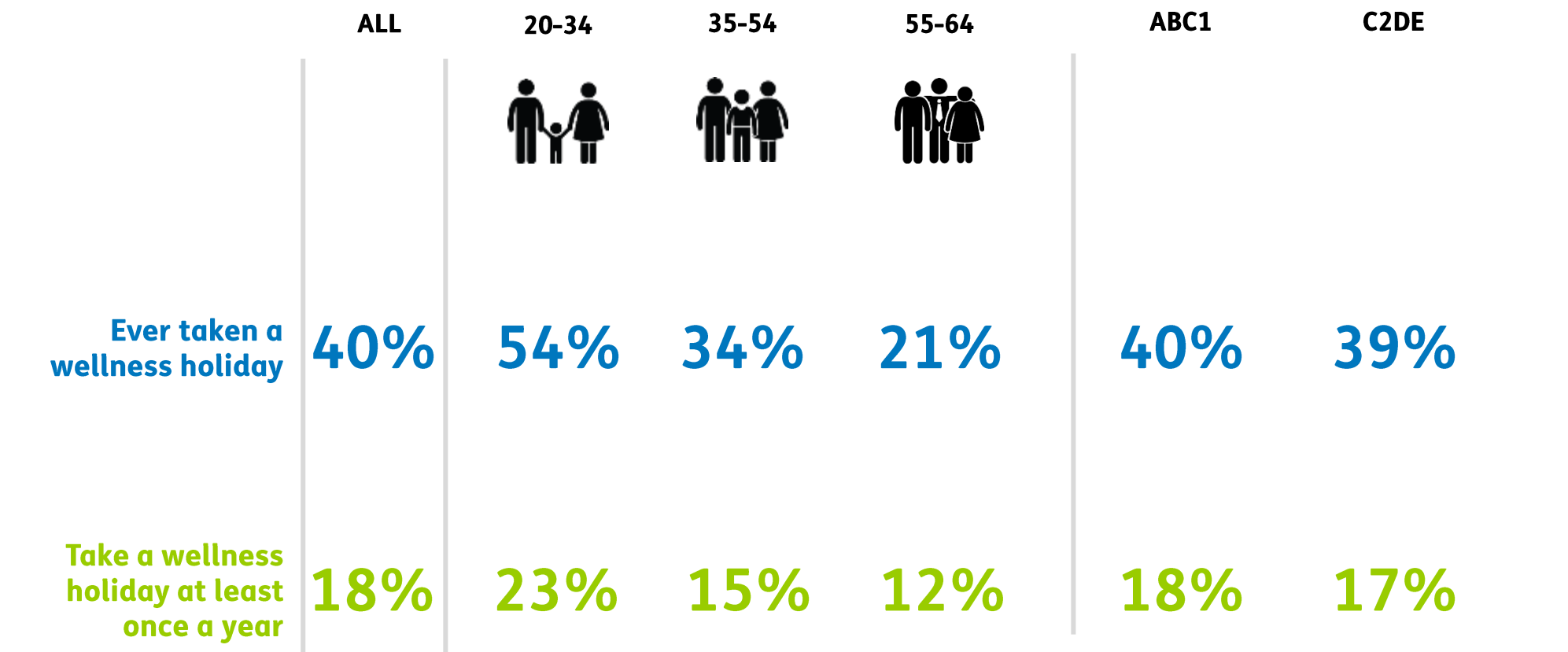
Definition: A holiday where the main driver of choice is to take part in activities and/or use facilities that specifically enhance your health and wellbeing



Worldwide, wellness tourism is growing twice as fast as tourism generally (SSI international)

2 in 5 Britons have taken a wellness holiday, rising to 54% amongst 20-34 year olds. Wellness holidays are social grade neutral.

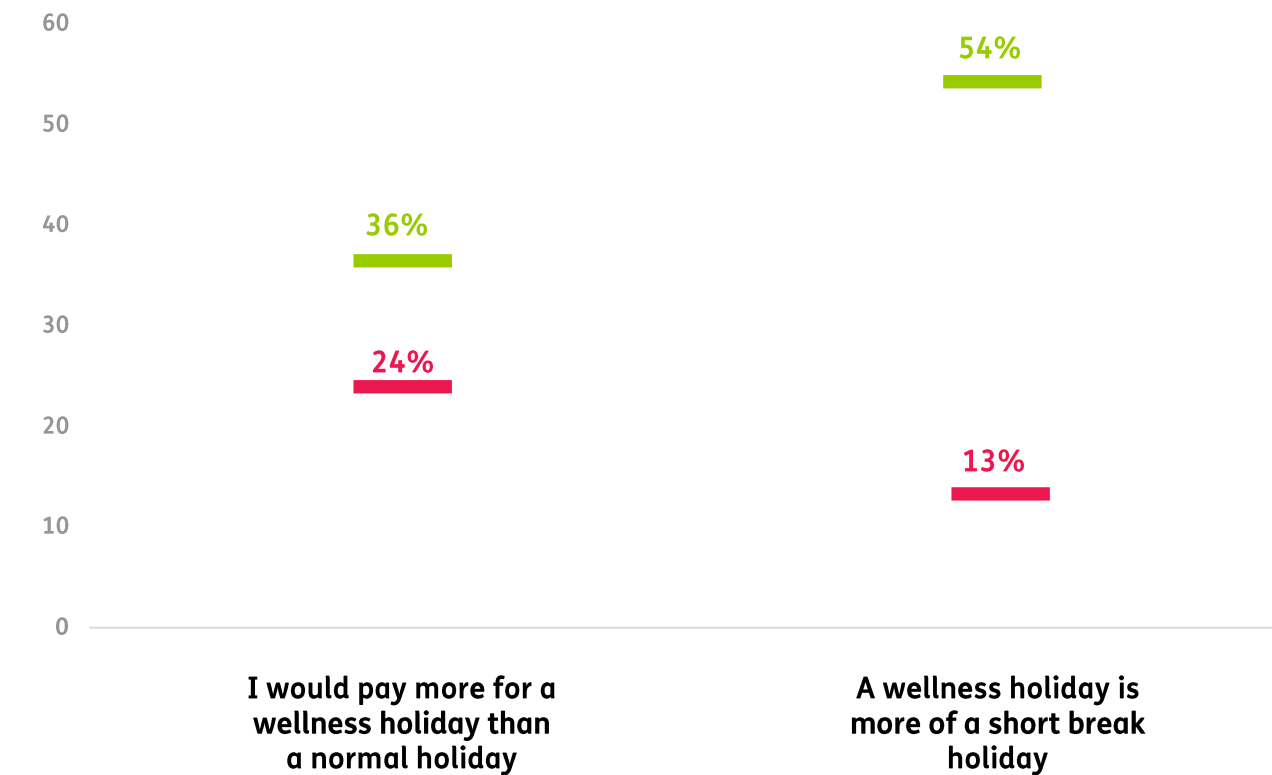
Proportion who take a wellness holidays by age and social grade



How often do you go on the following where the primary purpose is wellness?

Wellness holidays tend to be more of a short break holiday and attract a higher spend.

Agreement with statements on wellness holidays amongst wellness holiday makers (%)



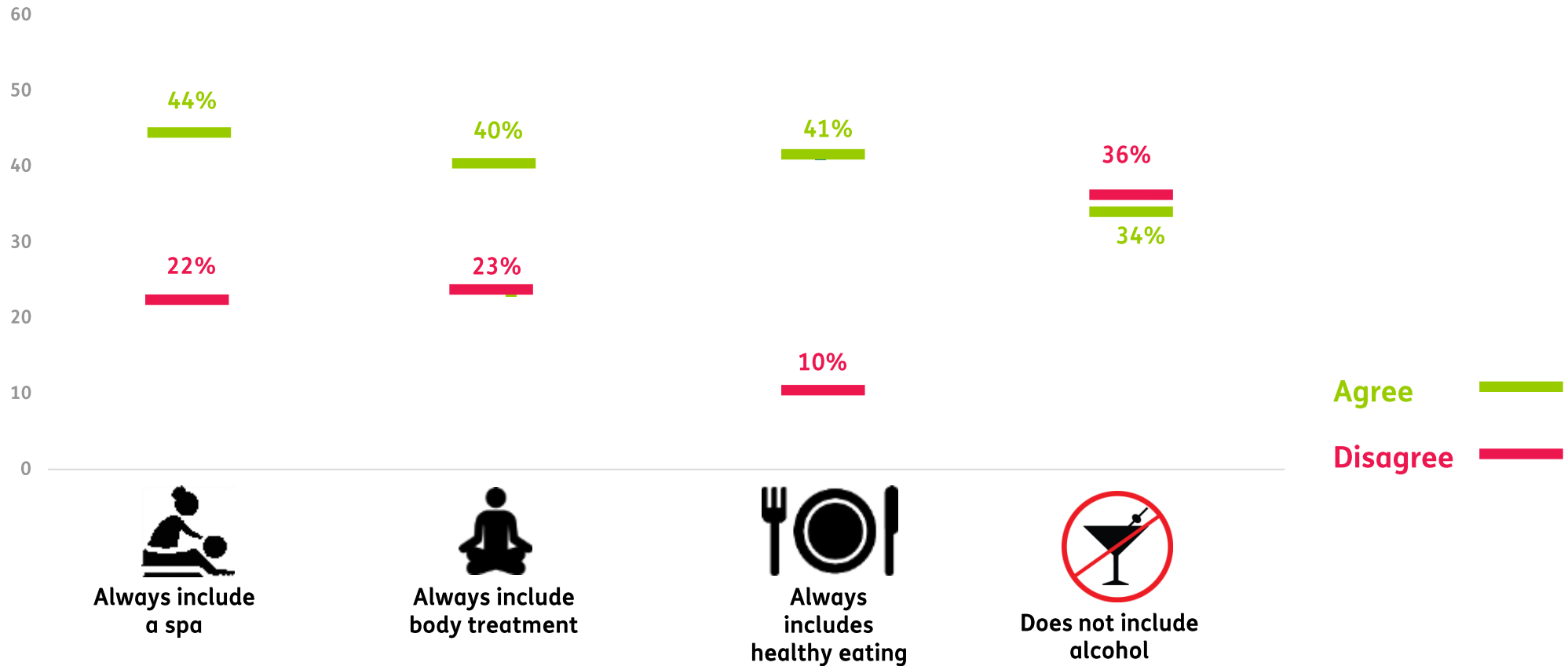
Anticipated cost (%)



Please state how much you agree /disagree with the following statements other people have made about wellness (Neither agree nor disagree excluded from chart) / Compared to the level of accommodation you would stay in on a non-wellness holiday, what level of accommodation would you expect to stay in on a wellness holiday?

Wellness generally includes a spa, body treatments and healthy eating. But it doesn't exclude alcohol. Wellness isn't detox.

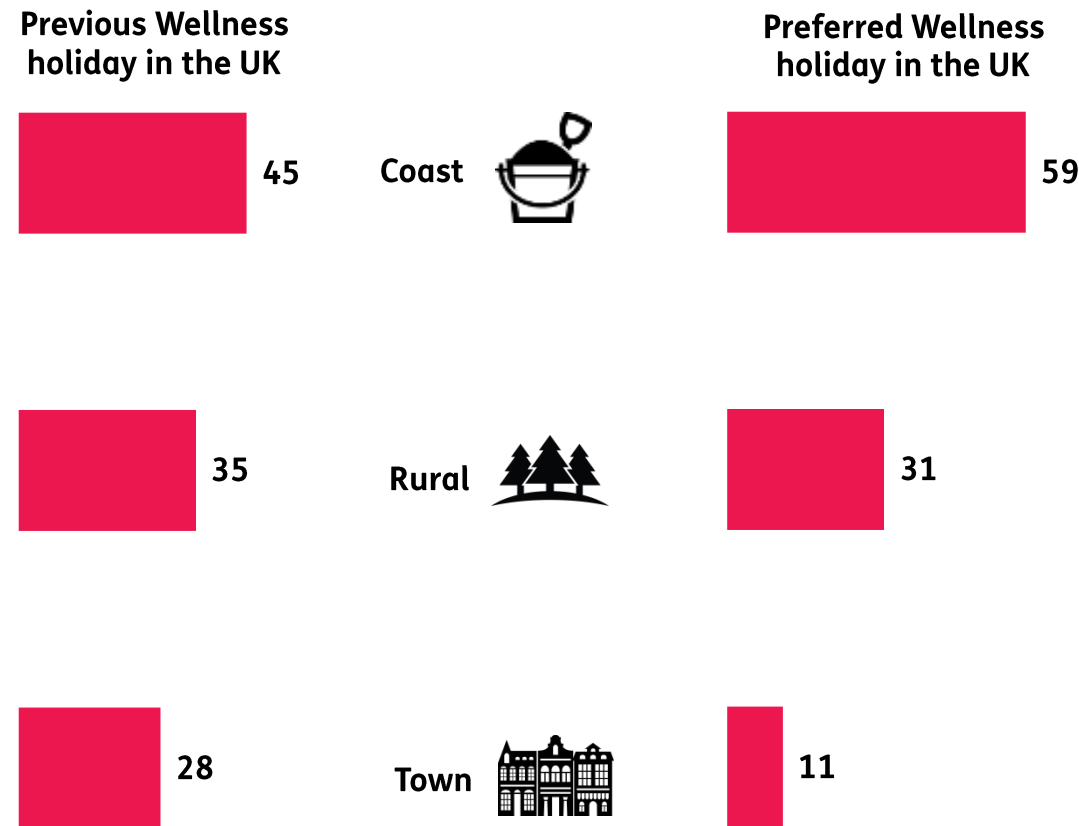
Perceptions of a wellness holiday (% agree or disagree)



Please state how much you agree /disagree with the following statements other people have made about wellness? (Neither agree nor disagree excluded from chart)

The coast is preferred destination for a wellness holiday, although this is less obvious in current habits. Opportunity gap?

Wellness holiday preference (%)

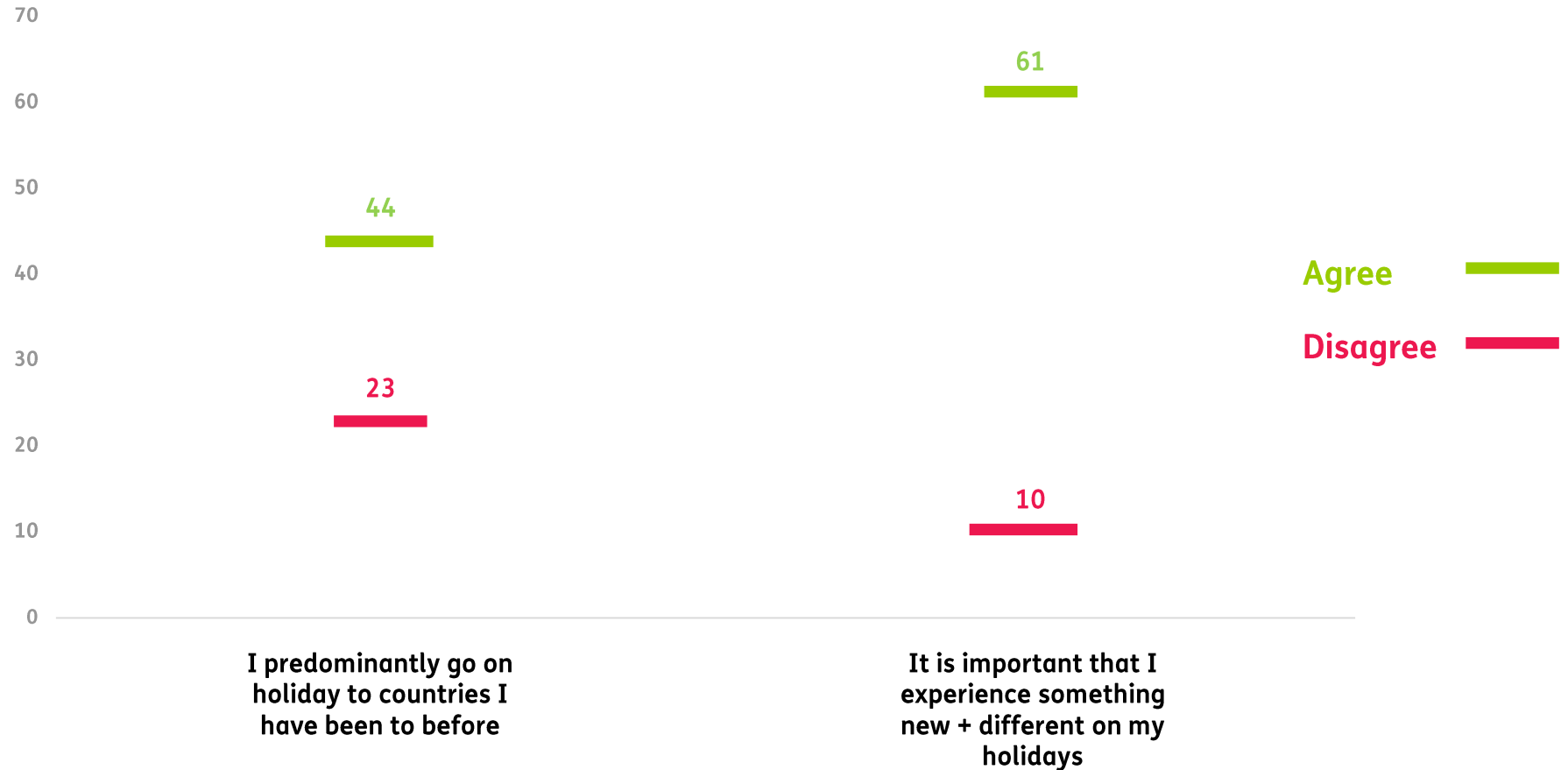


Where have you taken a holiday or short break where the primary purpose has been wellness? / Given the equal choice of three dedicated UK wellness destinations which setting would you instinctively prefer?

The holiday decision making process

Over 4 in 10 return to previous destination. 20-34yrs most likely to seek new experiences.

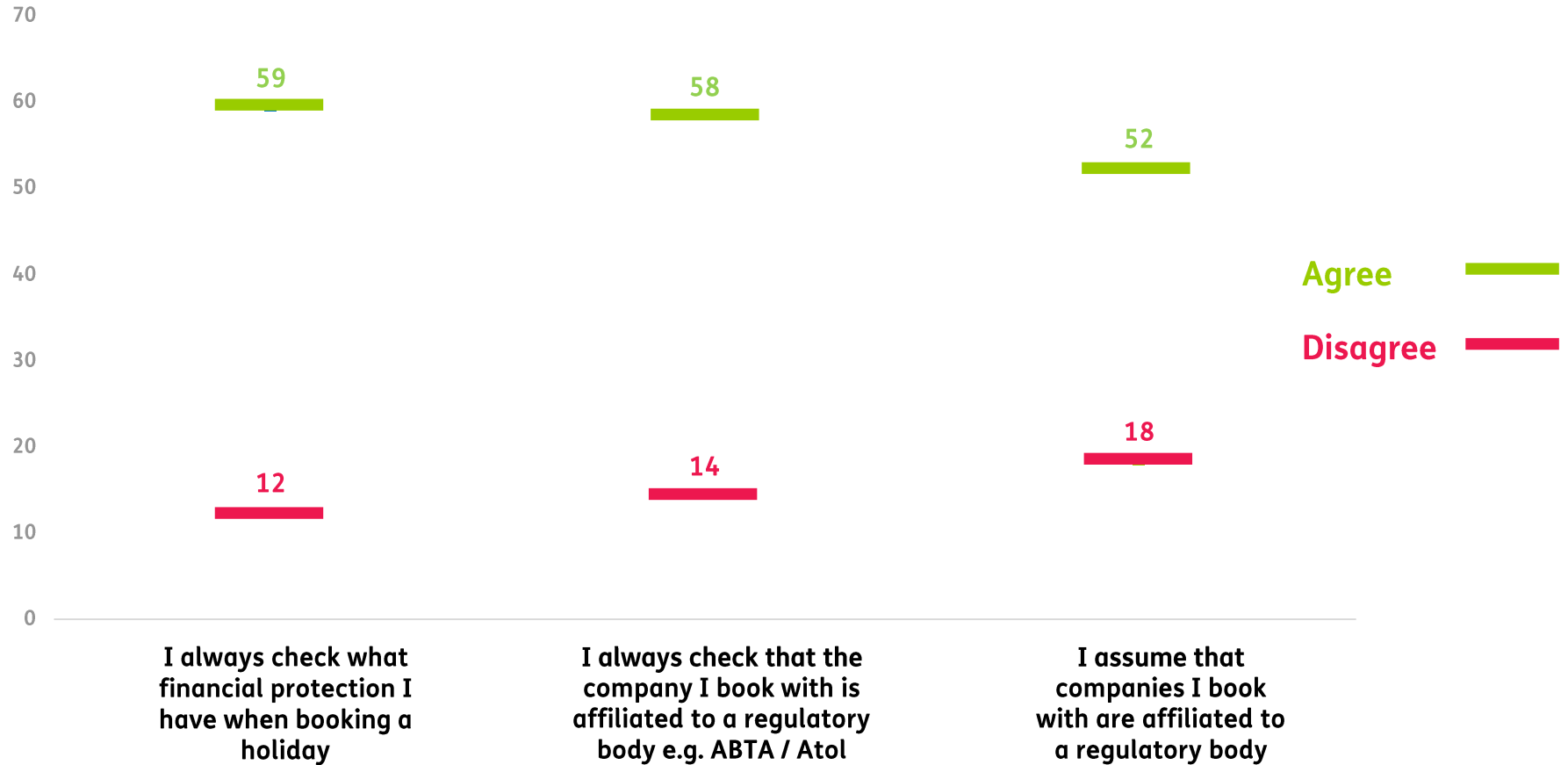
Holiday destination preference (%)



How much do you agree or disagree with the following statements?

Majority check financial protection and company regulation particularly older generations

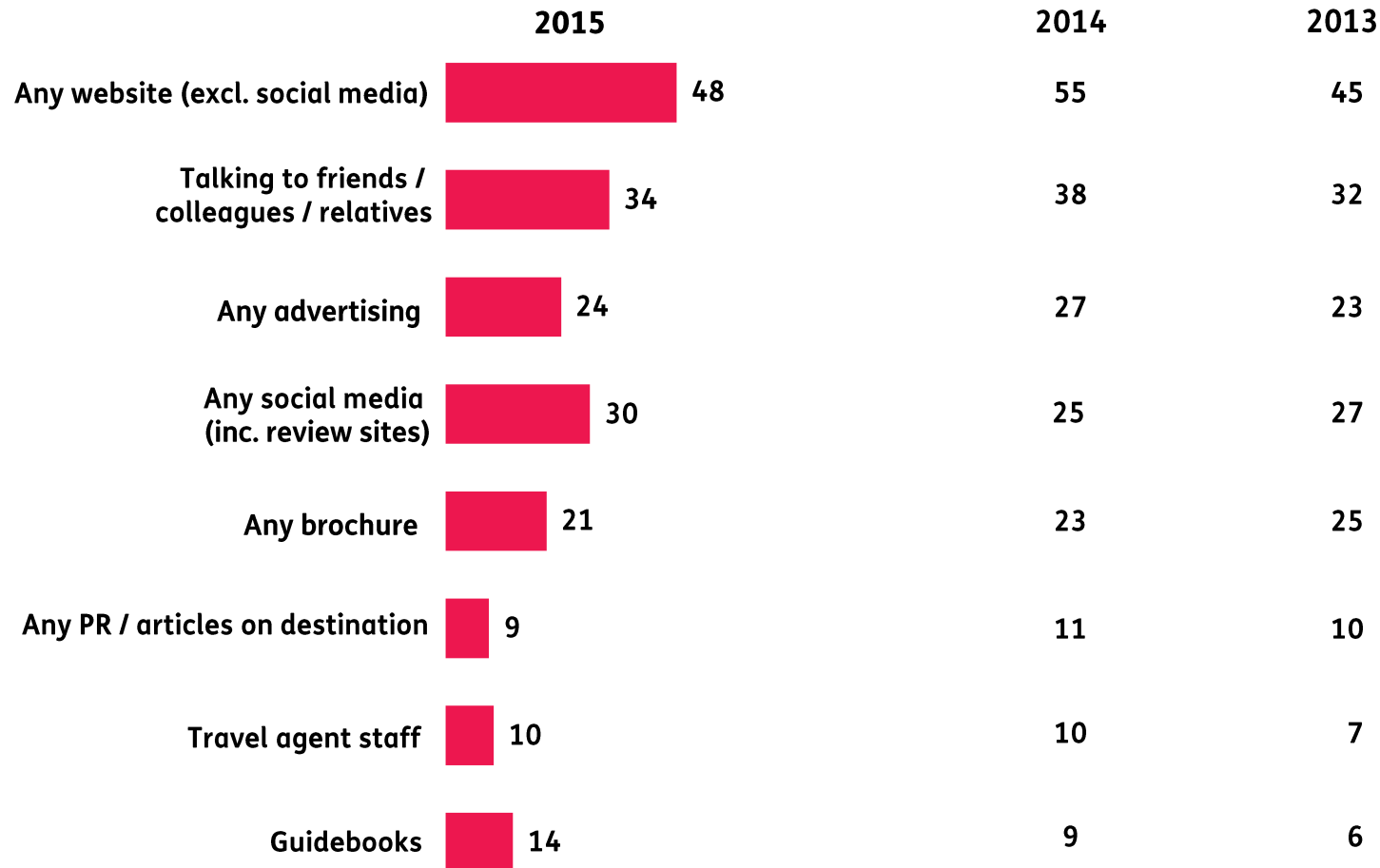
Financial considerations when booking a holiday (%)



How much do you agree or disagree with the following statements?

Website influence has dropped, social media increased. Guidebooks also increased.

Overall influences on holiday booking (%)

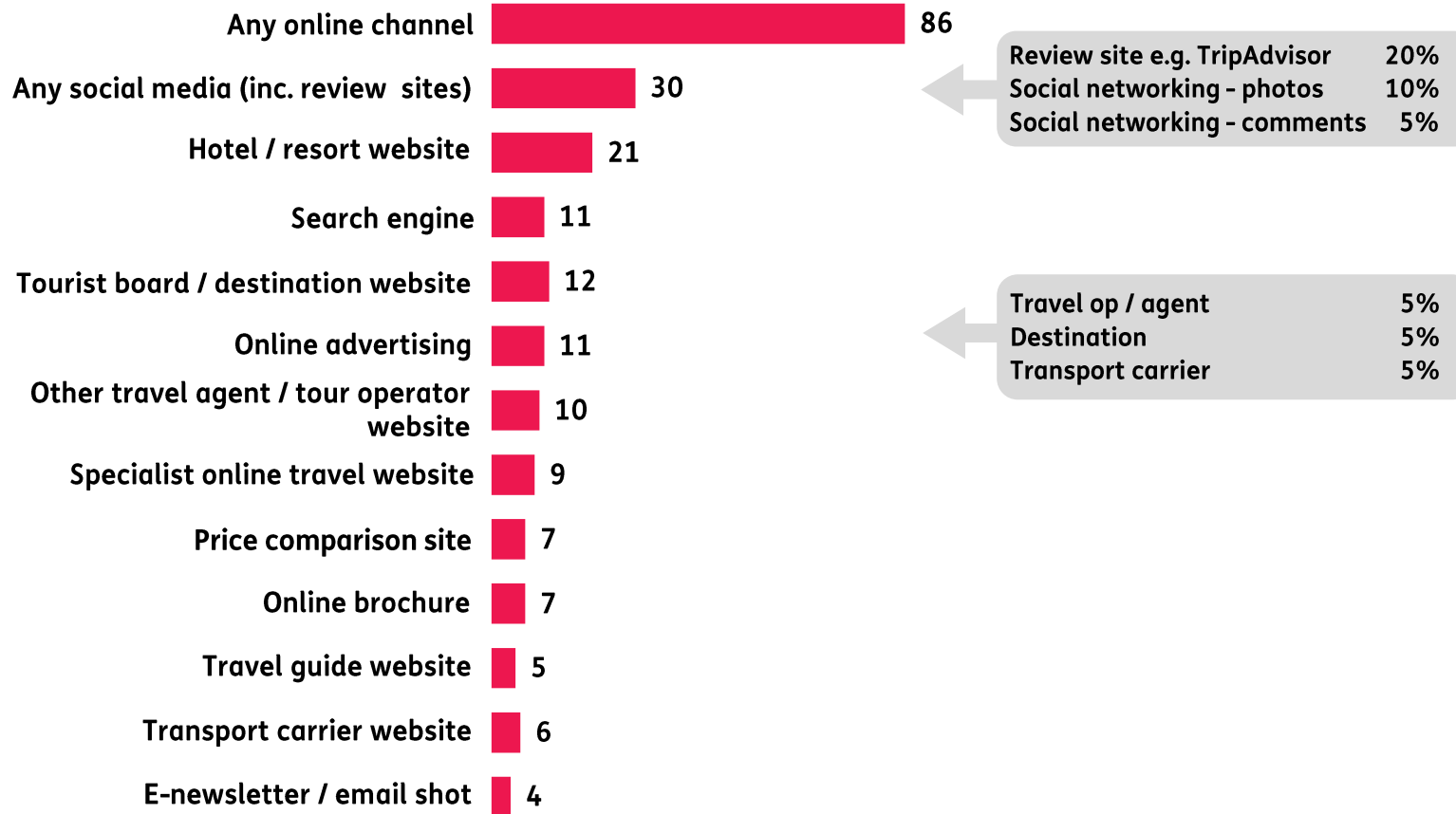


Thinking about this holiday, which of these sources of information influenced your decision to book?
And which of these sources of information influenced your decision to book this holiday?

Nearly 9 in 10 were influenced by any online channel.

Online Influences on holiday booking (%)

2015



Thinking about this holiday, which of these sources of information influenced your decision to book?

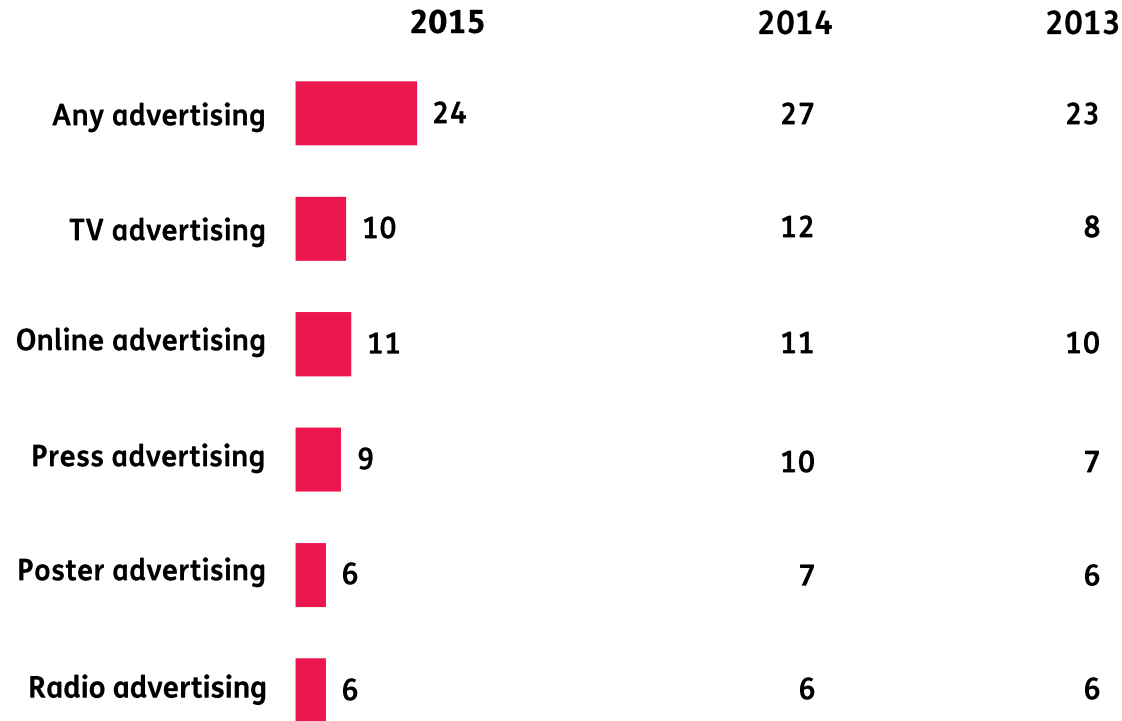
And which of these sources of information influenced your decision to book this holiday?

(No Comparison due to change of questionnaire change in 2015)

TV and online advertising influential for 1 in 10 holiday-makers.

Advertising influencing 1 in 4 overall.

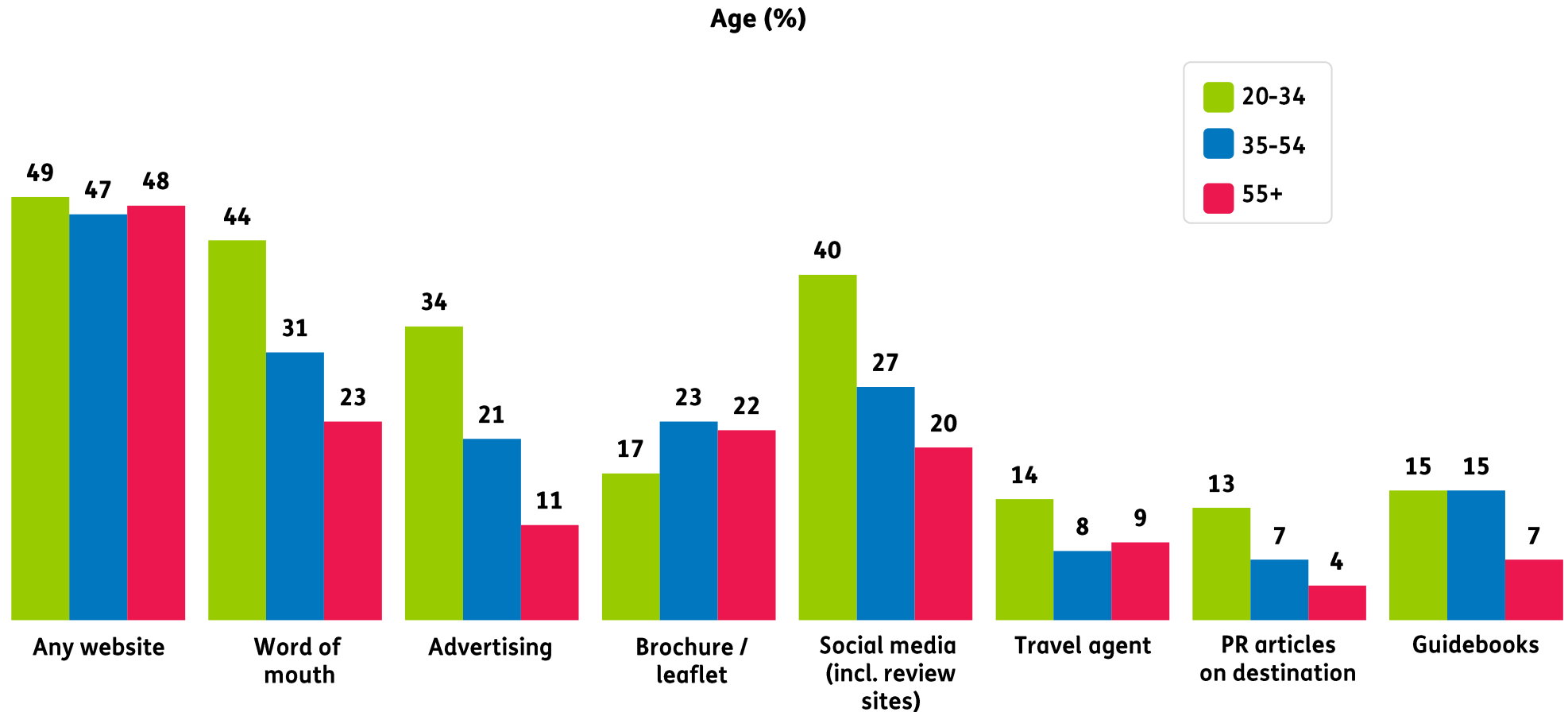
Advertising influences on holiday booking (%)



Thinking about this holiday, which of these sources of information influenced your decision to book?
And which of these sources of information influenced your decision to book this holiday?

Generation Y (20-34yrs) most likely to be influenced particularly by social media and advertising.

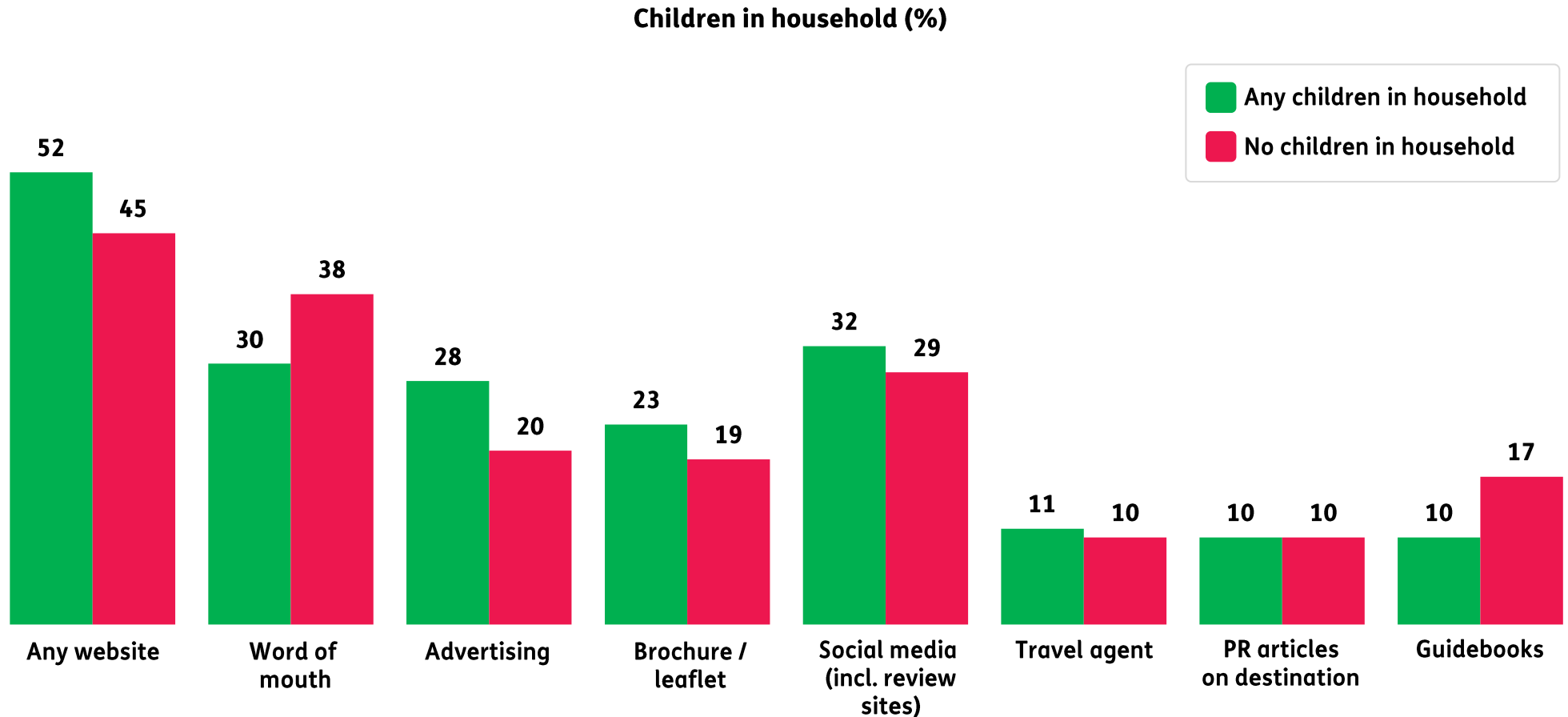
Overall influences on holiday booking – by age group (%)



Thinking about this holiday, which of these sources of information influenced your decision to book?
And which of these sources of information influenced your decision to book this holiday?

Families most likely to be influenced by websites, non-families by word of mouth and guidebooks

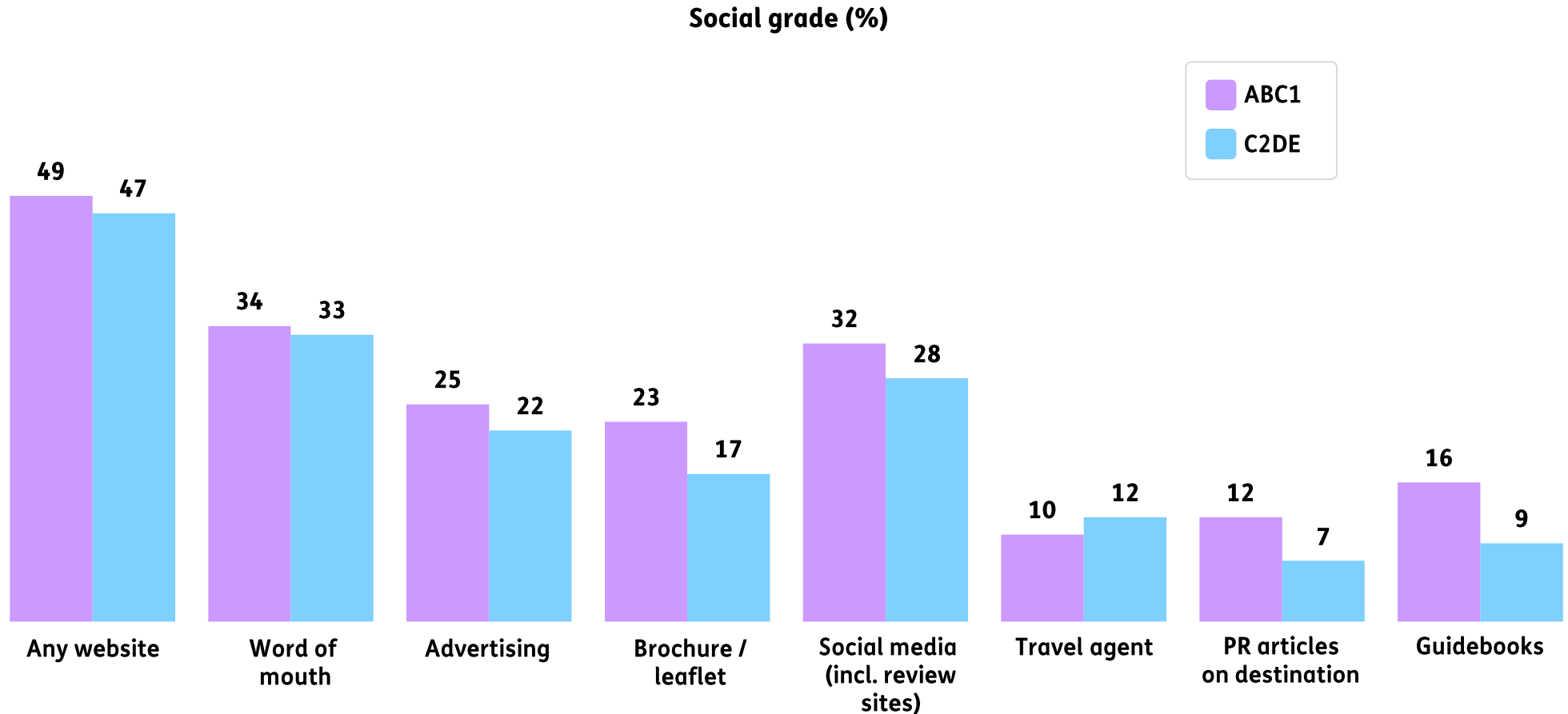
Overall influences on holiday booking – by family status (%)



Thinking about this holiday, which of these sources of information influenced your decision to book?
And which of these sources of information influenced your decision to book this holiday?

ABC1s more likely to be influenced by social media, PR/articles and guidebooks, C2DEs by travel agents

Overall influences on holiday booking – by social grade (%)



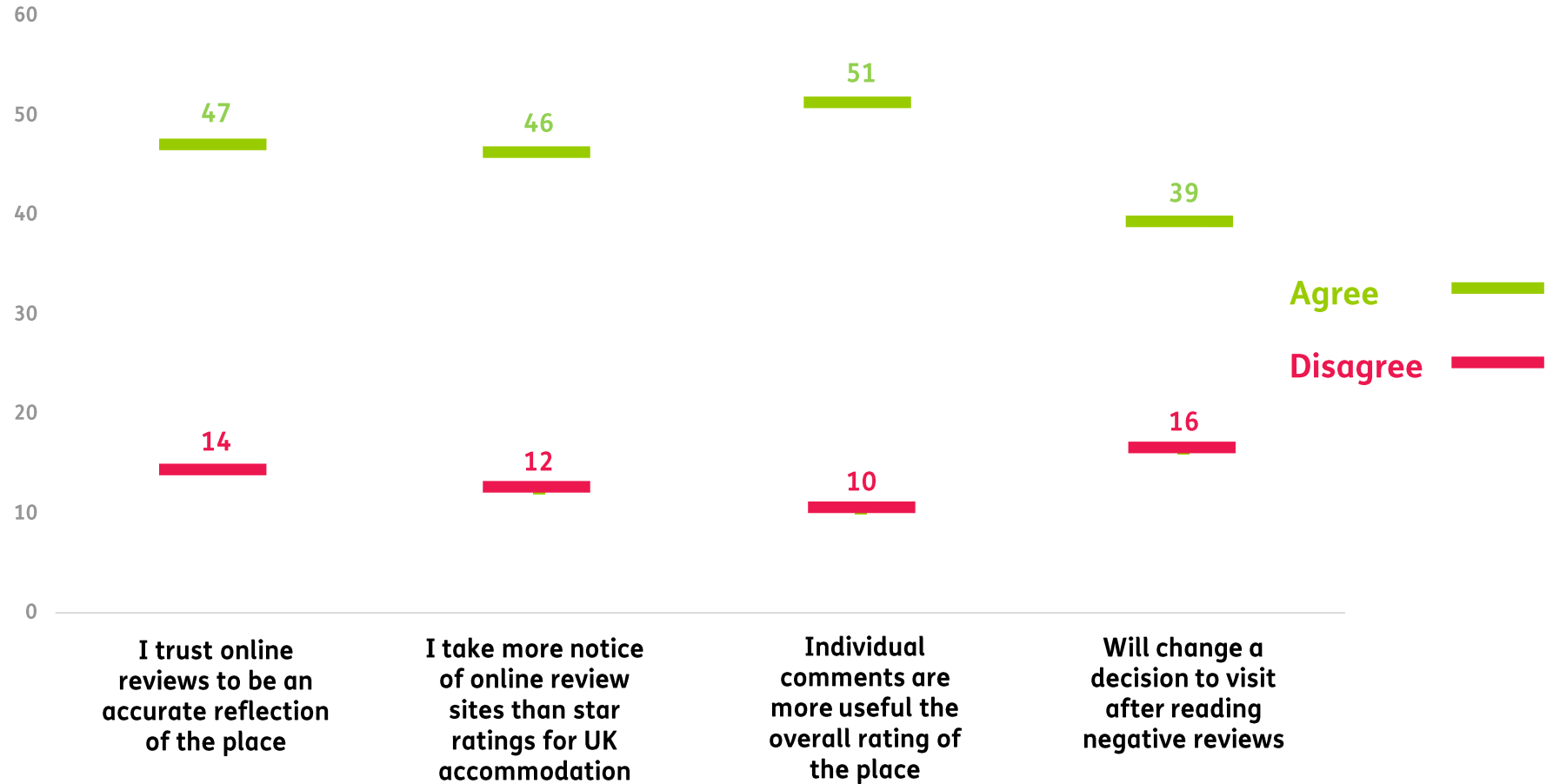
Thinking about this holiday, which of these sources of information influenced your decision to book?
And which of these sources of information influenced your decision to book this holiday?

Social media and review sites



Online review sites remain influential. Are star ratings becoming redundant?

Online review influence (%)



How much do you agree or disagree with each of these statements about online review sites such as these?

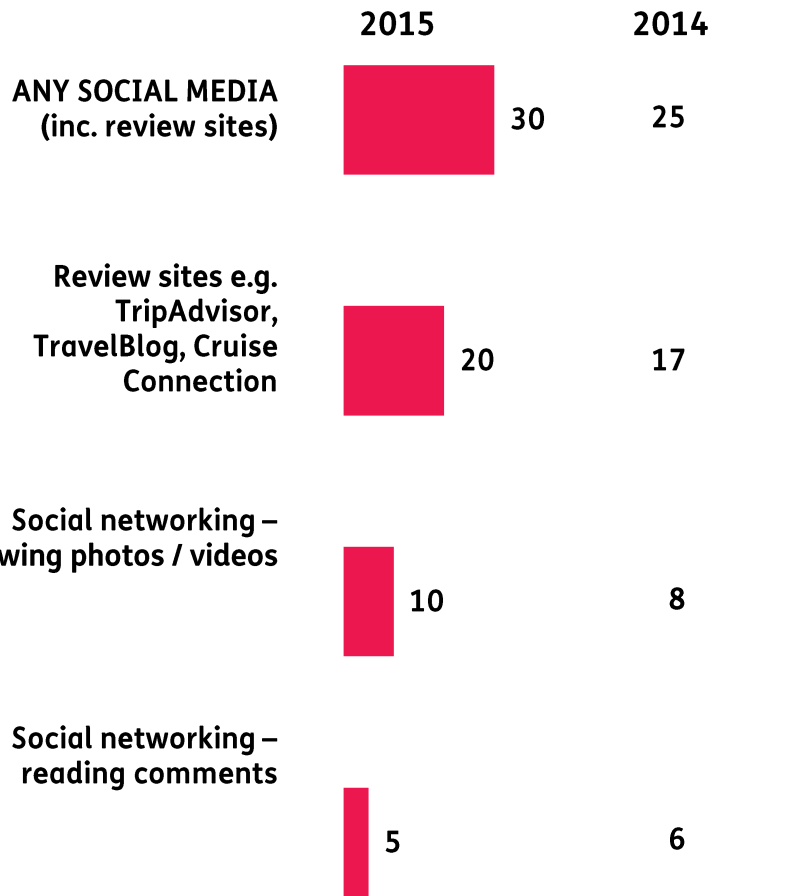
Online review sites becoming more important in holiday decision-making, 7 in 10 using them at least occasionally

Use of online reviews to decide holiday destination (%)



How often do you use online review sites when deciding where to go on holiday?

Influence of social media on holiday booking (%)



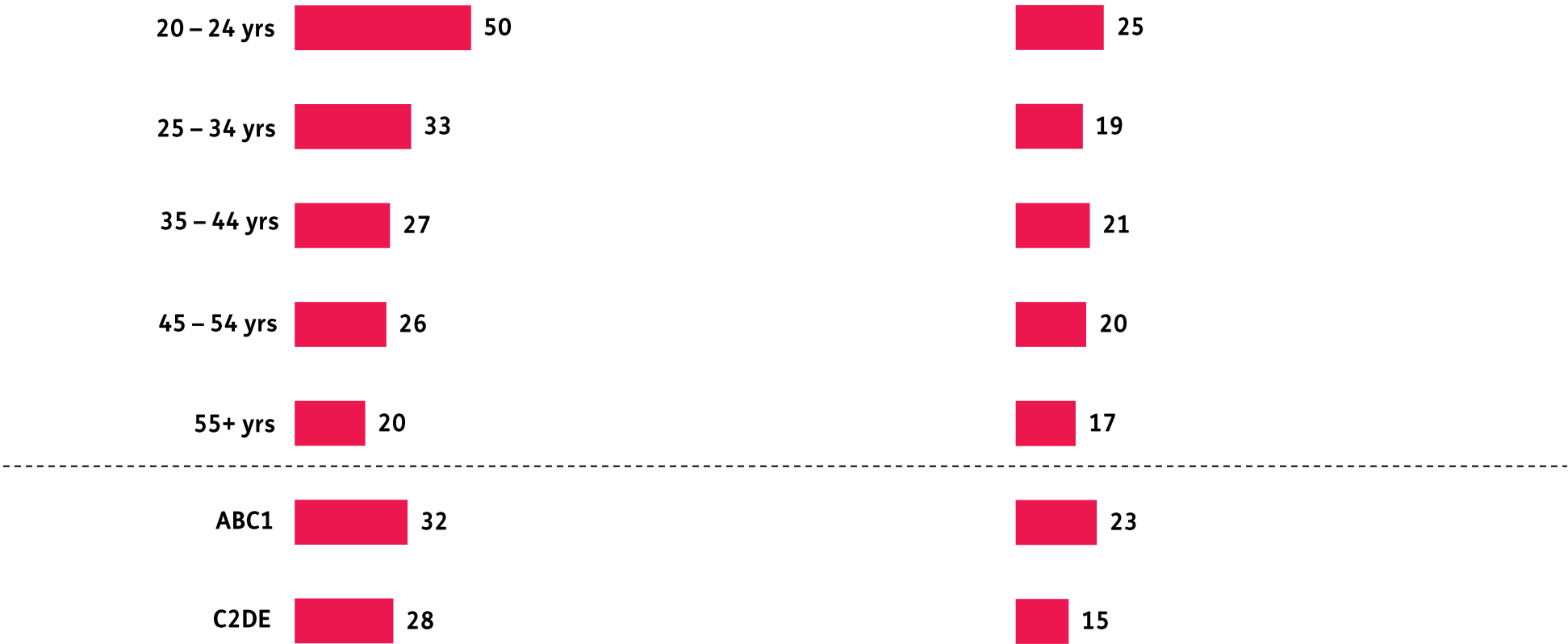
And which of these sources influenced your decision to book your main 2015 holiday?

Social media most influential amongst young adults. Review sites are more age neutral.

Influence of social media by age (%)

ANY SOCIAL MEDIA (inc. review sites)

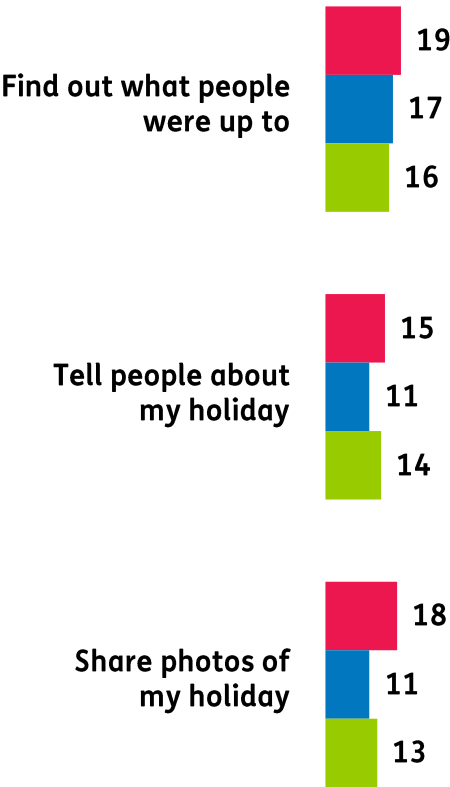
Online review sites



And which of these sources influenced your decision to book this holiday?

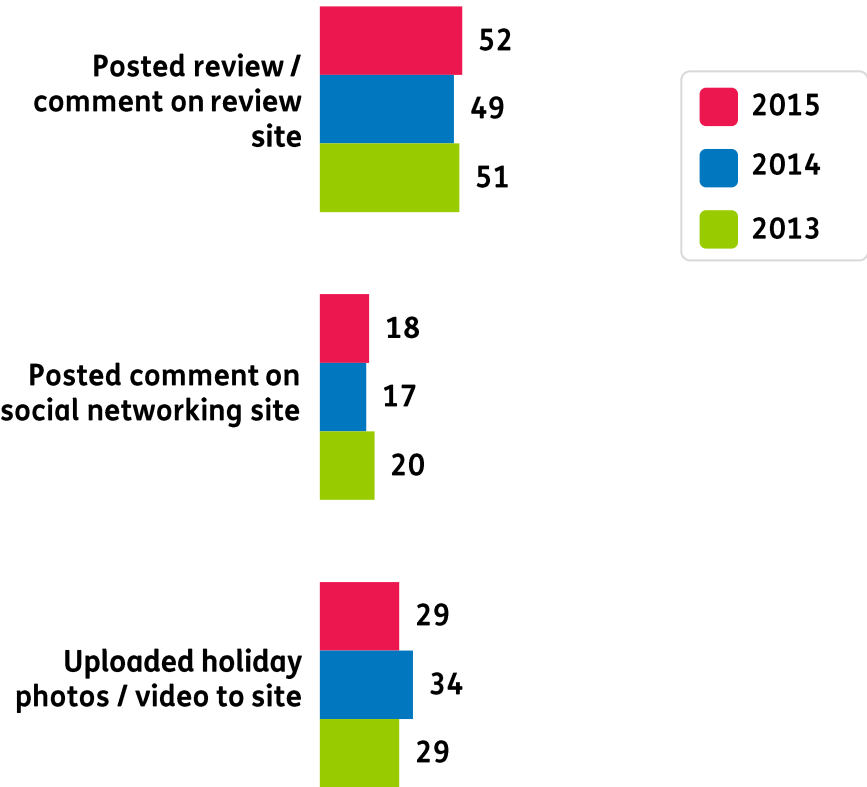
Photo sharing on social media whilst on holiday has increased. Linked to increased provision of free wifi?

Use of social media during holiday (%)



Which of these did you use social networking sites for whilst on holiday?
Base: all who took a holiday last in 2014 (627)

Use of social media after holiday (%)

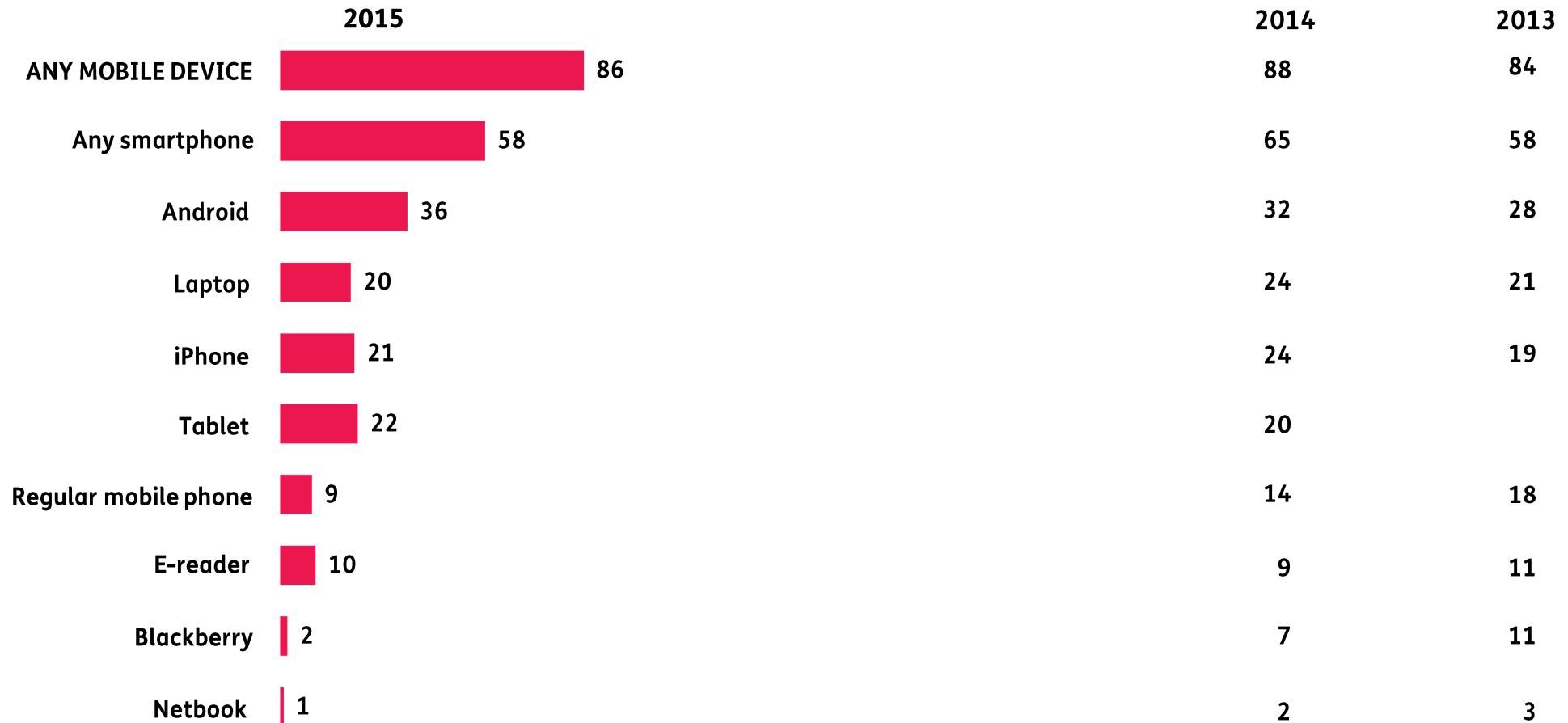


And thinking about after you had returned from your holiday, which of these did you use to tell people about your holiday?
Base: All who took a main holiday in 2014 (627)

Usage of Mobile Devices on Holiday

The majority of respondents used a mobile device whilst on holiday

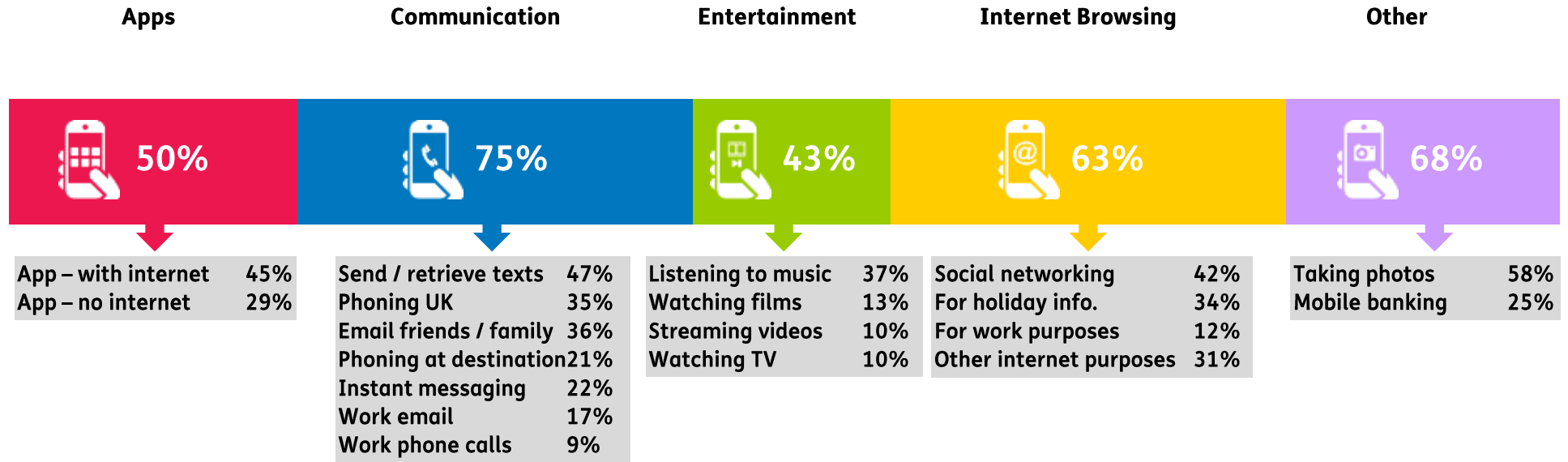
Mobile devices used on last main holiday (%)



Still thinking about the last main holiday you went on last year, which of these mobile devices did you use while you were away on this holiday?

A wide range of uses for mobile devices whilst on holiday. Taking photos is the single highest use.

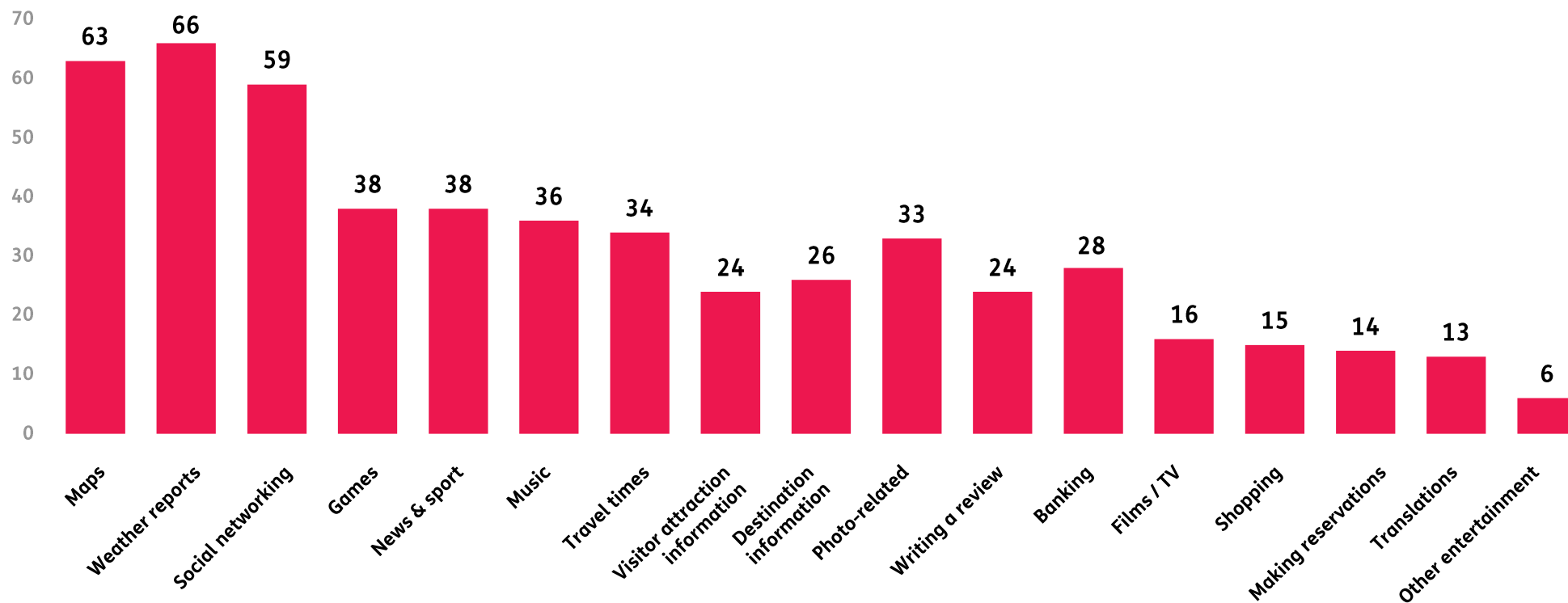
Mobile device use: breakdown (%)



While on this holiday, for which of these purposes did you use... (MOBILE DEVICE)?

Weather reports and maps most commonly used apps on holiday.

Mobile app usage (%)



Which of the types of Apps did you use during your holiday?

Thank you for reading Holiday Trends 2015. We hope you find it useful.
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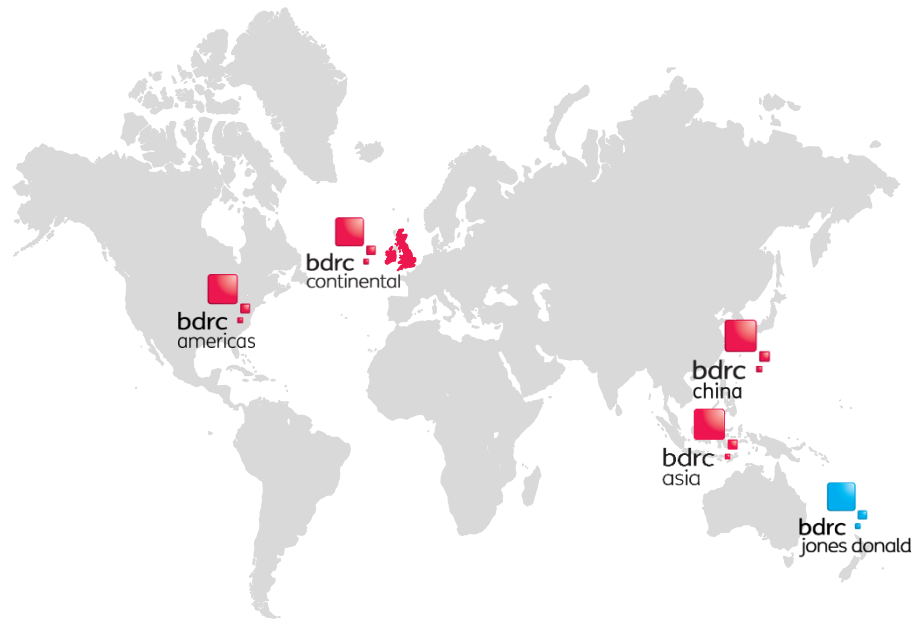
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Thank you

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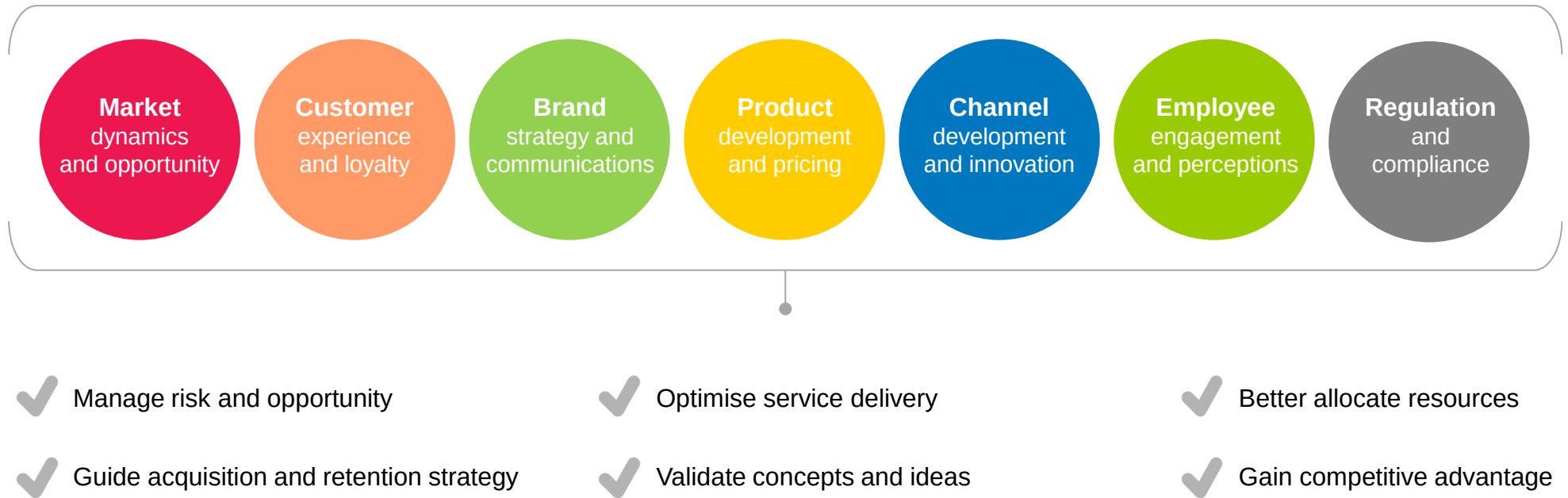


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Market perspective
through syndicated
research & market reports



Holiday report



Attractions & Accommodation
business monitors



Fundraising Verdict

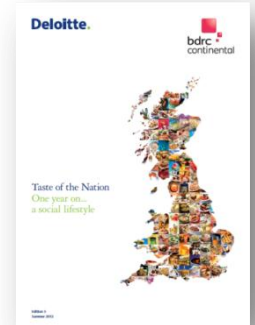


Visitor experience
benchmarking



Visits to Visitor
Attractions Census

Taste
of the
Nation



Regular conference
sponsors & speakers



ALVA



...and works with many of the UK's leading attractions and industry bodies

ALVA



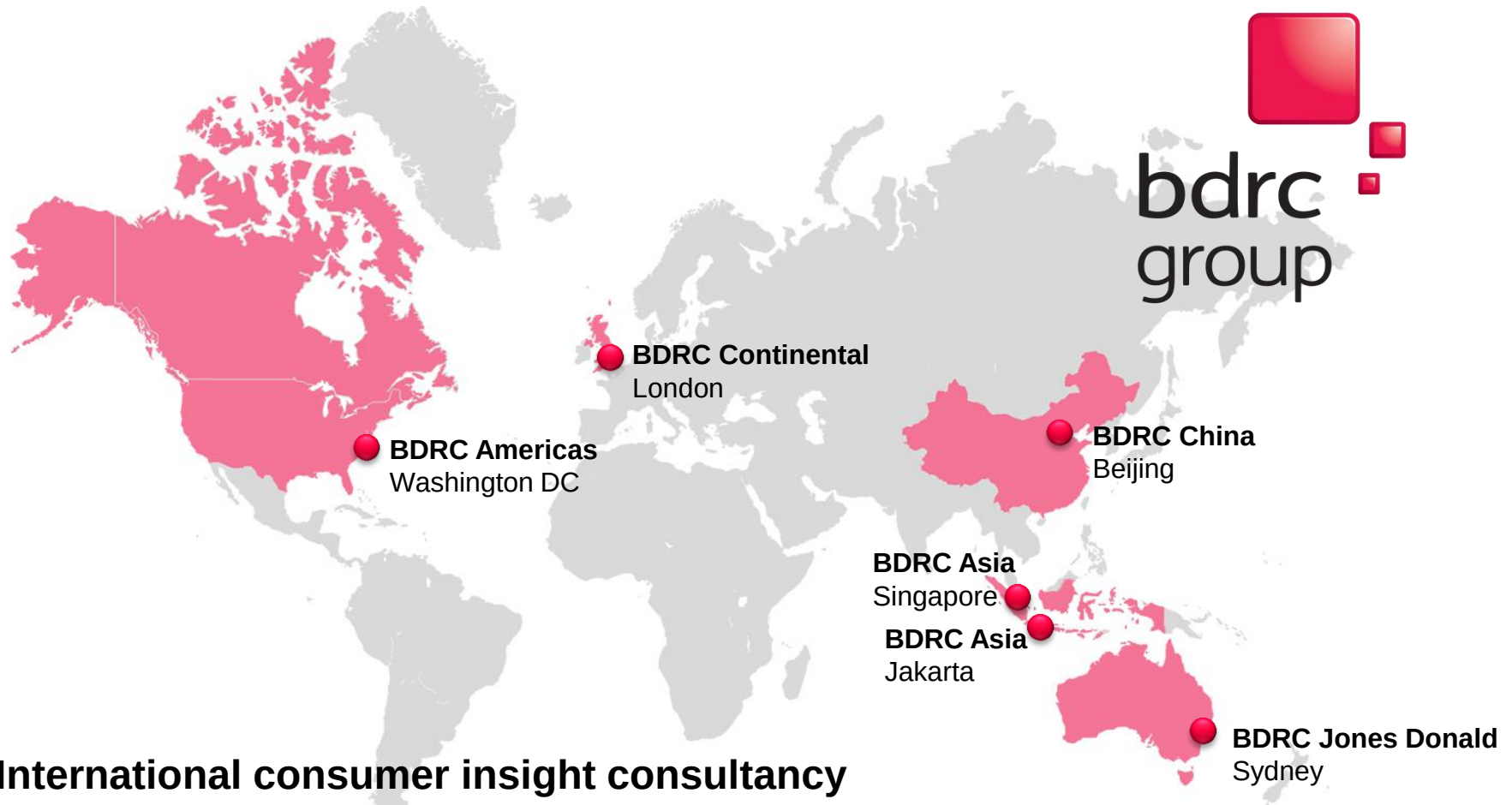
Historic Royal
PALACES

The Royal Collection
Royal Palaces, Residences and Art Collection



Birmingham
MUSEUMS





- **International consumer insight consultancy**
- **Launched 1991**
- **Conduct research in 70+ countries**
- **Group revenues – c 27m Euros**

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