

Touring and Adventure Holidays: Inc Impact of COVID-19 - UK - May 2020

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This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and the touring and adventure holidays market.
- The longer-term prospects for touring and adventure holidays.
- Consumer trends and preferences, and recent product developments.
- Future opportunities for touring and adventure holidays.

The pre-crisis trends towards long-haul and off-the-beaten-track touring are likely to be put on hold, at least for a while, as travellers stick to more familiar haunts closer to home, for a mix of health and economic reasons. In the longer run, the touring and adventure holiday market had strong future growth prospects prior to the COVID-19 crisis, and is likely to bounce back, helped by the wanderlust and relative affluence of an expanding over-55 population.

However, the sector faces particular challenges regarding consumer anxieties about group-based travel, which are likely to further delay and complicate the recovery process. In the longer run, the touring and adventure holiday market is likely to bounce back, helped by the relative affluence, population growth and hunger for travel of over-55s. To capitalise on this, the market will have to adapt by focusing on smaller group sizes, private escorted tours and self-guided touring for closed groups of family and friends.



"When travel restrictions begin to ease consumers will be more cautious about group-based touring formats than other holiday types. The market will have to adapt. Adaptations should include smaller group sizes incorporating the 'new normal' of social distancing, private escorted tours and self-guided tours for closed groups of family and friends."

- John Worthington, Senior Analyst, 28 May 2020

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THE IMPACT OF COVID-19 ON TOURING AND ADVENTURE HOLIDAYS

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Figure 11: Expected impact of COVID-19 on touring and adventure holidays, short-, medium- and long-term, 13 May 2020

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- The implications

THE MARKET – WHAT YOU NEED TO KNOW

- Touring & adventure is likely to recover more slowly than many other travel sectors
- Long-haul trend likely to be put on hold
- But long-term demographic potential is huge
- Single-living trend offers growing scope for solo touring
- Silver Travel research backs up Mintel findings on group size, flexibility and premium touring

MARKET BACKGROUND

- Pre-COVID touring destination trends
 - The pre-crisis long-haul touring trend may be slow to return
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 - Italy has been the best-selling short-haul touring destination
 - Screen influence
 - Over-55 population growth points to a long-term boom in touring

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Figure 22: Leading group adventure travel tour operators, May 2020

- **TourHound**
- **Airbnb Adventures**

LAUNCH ACTIVITY AND INNOVATION

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- **Personalisation**
- **Removing holiday hassles**
- **Solo touring**
- **Plant-based touring**

THE CONSUMER – WHAT YOU NEED TO KNOW

- **One in seven adults have been on a touring/adventure holiday in the past five years**
- **Almost half of touring customers book with a specialist brand**
- **Long-term interest in touring and adventure is strong after post-COVID recovery**
- **Flexible touring is critical for success**
- **Luxury/budget polarisation**
- **Self-guided and smaller group demand likely to rise in the post-COVID world**

PARTICIPATION IN GROUP TOURING AND ADVENTURE HOLIDAYS

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- **Touring holidays include an above-average element of long-haul travel**

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FUTURE INTEREST IN GROUP TOURING & ADVENTURE HOLIDAY DESTINATIONS

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- Family adventure

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