

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“There is scope for greater diversification away from the dominant beach resort, city break and theme park products. Holidays with the biggest future growth potential include tailor-made independent and escorted touring holidays, off the beaten track adventure travel, nature tourism and sea cruises.”

– **John Worthington, Senior Analyst**

This report looks at the following areas:

- Improving the US brand image
- Going the distance
- New parents are the most likely to respond to the 'magic of Disney'
- Spoiled for choice
- All-inclusives that include the local culture

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this Report

Executive Summary

The market

Holidays to the Americas & Caribbean up 22% since 2014 but the US segment has been flat

Figure 1: Holidays to North America volume forecast, 2014-24

Figure 2: Holidays to the Caribbean volume forecast, 2014-24

Figure 3: Holidays to Central/South America volume forecast, 2014-24

Companies and brands

Virgin is the market leader

Premium tailor-made tours are a growing product area

Diversification and sustainable tourism

The consumer

Canada & Caribbean have the biggest potential for new visitors

Figure 4: Experience of and interest in visiting long-haul regions, August 2019

New England attracts older Brits

Figure 5: interest in visiting regions in the US on holiday, August 2019

Beach resorts, villas & cruises are the most in-demand Caribbean holidays

Figure 6: Interest in visiting islands in the Caribbean on holiday, August 2019

Brazil is the sleeping giant of South American tourism

Figure 7: Interest in visiting destinations in South/Central America on holiday, August 2019

Barriers to entry

Figure 8: Barriers to a holiday in the Americas & Caribbean, August 2019

Women are most attracted by luxury & multi-centre holidays

Figure 9: Holiday opportunities in the Americas & Caribbean, August 2019

What we think

Issues and Insights

Improving the US brand image

The facts

The implications

Going the distance

The facts

The implications

New parents are the most likely to respond to the 'magic of Disney'

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Spoiled for choice

The facts

The implications

All-inclusives that include the local culture

The facts

The implications

The Market – What You Need to Know

Holidays to the Americas and Caribbean up 5% in 2018...

...But there has been a long-term decline in US holidays

Caribbean recovering from severe 2017 hurricane season

Mexico has driven the rapid rise of South/Central America

Weak Pound has dampened demand for US but Sterling has fared better elsewhere

Long-haul demand weakening

Aviation competition may boost travel to the region

Market Size and Forecast

Four million holidays to Americas & Caribbean

Figure 10: Volume of holidays taken to the Americas & Caribbean, 2014-24

Figure 11: Value* of holidays taken to the Americas & Caribbean, 2014-24

Forecast

Figure 12: Holidays to North America volume forecast, 2014-24

Figure 13: Holidays to North America value* forecast, 2014-24

Figure 14: Holidays to the Caribbean volume forecast, 2014-24

Figure 15: Holidays to the Caribbean value* forecast, 2014-24

Figure 16: Holidays to Central/South America volume forecast, 2014-24

Figure 17: Holidays to Central/South America value* forecast, 2014-24

Forecast methodology

Market Segmentation

Holidays to the US led by New York & Orlando

Jamaica, Barbados and Dominican Republic are the most popular Caribbean destinations

Holidays to Mexico have risen 66% since 2014

Brazil and Peru are next most popular South American destinations

Figure 18: Volume of holidays taken to destinations in the Americas & Caribbean, 2014-18

Package tour operators dominate Caribbean & Central/South American holidays

Collapse of Cook leaves a gap in Caribbean market

Figure 19: Volume of holidays taken to the Americas & Caribbean in 2018, package versus independently booked

South/Central America has the longest duration holidays

Figure 20: Volume of holidays taken to the Americas & Caribbean in 2018, by duration

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Caribbean is the broadest all-year-round market

Figure 21: Volume of holidays taken to the Americas & Caribbean in 2018, by quarter of travel

The Caribbean has the oldest age profile

Figure 22: Volume of holidays taken to the Americas & Caribbean in 2018, by age group

Market Background

Consumers cautious as uncertainty continues

Figure 23: UK average weekly earnings (excluding bonuses)* vs CPI inflation, percentage change year-on-year, January 2017-September 2019

Pound weak against the Dollar but strong against Mexican peso

Figure 24: Sterling exchange rate versus selected currencies, annual averages, 2014-18, and spot rate 22 October 2019

Long-haul travel volumes have dropped in 2019

Figure 25: Volume of short-haul and long-haul holidays, 2014-18

Virgin Atlantic increases capacity to US and enters Brazil for the first time

Norwegian also enters South America with low cost model

Companies and Brands – What You Need to Know

Mass market is highly competitive

Virgin Voyages launch in 2020 will target younger cruise clientele

Premium tailor-made is a growing product area in the Americas & Caribbean

Regional specialists

Tourism diversification

Slow travel

Sustainable tourism

Companies and Brands

Generalists

TUI

Virgin Holidays

Other long-haul & escorted tour specialists

Caribtours

Sandals

Journey Latin America

Launch Activity and Innovation

Diversifying from beach/theme park holidays

Slow travel in North America

Backpackers and flashpackers in Latin America

Chilean Patagonia shows way ahead for sustainable tourism

The Consumer – What You Need to Know

US will remain the most popular destination but the largest new potential lies elsewhere

New York, Florida & West Coast are the most popular US locations

Bahamas is the most aspirational Caribbean destination

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brazilian potential

Nature tourism is a major draw for Canada

Entry hassles, safety fears and politics seen as key barriers

Long-haul Holiday Regions Visited

4 in 10 adults have visited the US on holiday

Figure 26: Long-haul regions visited on holiday, August 2019

Men are more likely to go to the US than women

High proportion of Londoners holiday in the Caribbean

Future Interest in Visiting the Americas & Caribbean

Canada & Caribbean have the biggest potential for new visitors...

Figure 27: Experience of and interest in visiting long-haul regions, August 2019

...But the US is still the top priority destination

Figure 28: Main preference for visiting regions in the Americas & Caribbean, August 2019

Future Interest in Visiting North America

New York, Florida & West Coast are the places people most want to visit in the US

New England has a strong appeal to over-55s

Figure 29: Interest in visiting regions in the US on holiday, August 2019

City breaks are the most popular type of US holiday

Figure 30: Interest in holiday types in the US, August 2019

City breaks & touring holidays are the most in-demand Canadian holidays

Figure 31: Interest in holiday types in Canada, August 2019

Future Interest in Visiting the Caribbean

The Bahamas tops the wish-list for Caribbean holidays

Figure 32: Interest in visiting islands in the Caribbean on holiday, August 2019

Beach resorts, villas & cruises are the most popular holidays in the Caribbean

Figure 33: Interest in holiday types in the Caribbean, August 2019

Future Interest in Visiting Central/South America

Huge potential for holidays to Brazil

Figure 34: Interest in visiting destinations in South/Central America on holiday, August 2019

Consumers show interest in a wide variety of holidays in South America

Figure 35: Interest in holiday types in South/Central America, August 2019

Holidays in the Americas & Caribbean – Demographics of Preferred Holiday Types

Beach/villa holidays appeal most to under-45s

33% of over-55s are interested in taking an escorted tour

Cruises have a broad age appeal

Fly-drive holidays have the strongest AB bias

Parents with under-5s show the biggest interest in Disney World holidays

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Holidays to the Americas and the Caribbean - UK - November 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 36: Interest in holiday types in the Americas & Caribbean, August 2019

Holidays in the Americas & Caribbean – Attractions and Barriers

Cities are the main attraction for holidays to the US

Gastro appeal

The US is no longer seen as a value-for-money destination

Figure 37: Attractions of a holiday in the US, August 2019

Nature/wildlife is the main Canadian attraction

Figure 38: Attractions of a holiday in Canada, August 2019

Caribbean visitors want more than a beach chill

Figure 39: Attractions of a holiday in the Caribbean, August 2019

Cultural immersion is most important for holidays to Central/South America

Figure 40: Attractions of a holiday in Central/South America, August 2019

Leading barriers

Figure 41: Barriers to a holiday in the Americas & Caribbean, August 2019

Is there a 'Trump slump'?

Figure 42: Holidays in the Americas and the Caribbean – CHAID – Tree output, August 2019

Safety fears affect families the most

Caribbean advice sought by visitors

Holidays in the Americas & Caribbean – Future Opportunities

Long-distance adventures appeal to Baby Boomer travellers

Half of family travellers want to stay all-inclusive

37% of travellers are cultural explorers

Figure 43: Holiday opportunities in the Americas & Caribbean, August 2019

Women are most attracted by Caribbean luxury...

...And by multi-centre holidays

Over-55s are the most likely to use specialist destination companies

Appendix – Data Sources, Abbreviations and Supporting Information

Definitions

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Figure 44: Holidays to North America, volume forecast, 2019-24

Figure 45: Holidays to North America, value* forecast, 2019-24

Figure 46: Holidays to the Caribbean, volume forecast, 2019-24

Figure 47: Holidays to the Caribbean, value* forecast, 2019-24

Figure 48: Holidays to the Central/South America, volume forecast, 2019-24

Figure 49: Holidays to the Central/South America, value* forecast, 2019-24

Forecast methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com