

## Holiday Review - UK - January 2020

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.



This report looks at the following areas:

- Exploring destinations through food
- The battle in the package holiday market heats up

“The Thomas Cook collapse has had no impact on travellers’ faith in the package holiday market. However, many will be cautious when booking a package holiday, trusting their holidays to the hands of well-known companies that provide high quality customer experiences.”

– Marloes de Vries, Travel Analyst

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://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](mailto: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

# Holiday Review - UK - January 2020

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  
Products covered in this Report

### Executive Summary

The market  
Boost in staycations in 2019  
Moderate growth expected for staycations between 2020 and 2024  
Figure 1: Forecast volume of domestic holidays taken by British residents (number of trips), 2014-24  
Volume of overseas holidays declined in 2019 amid uncertainties  
Short-term outlook for overseas holidays remains cautious  
Figure 2: Forecast volume of overseas holidays taken by UK residents (number of trips), 2014-24  
Consumers saved more in 2019, putting spending levels under pressure  
Package holidays going strong amid Brexit uncertainties  
Greece and Turkey fastest-growing overseas destinations  
Election result had a positive impact on sterling's value  
Companies and brands  
easyJet launches its new holiday business  
Jet2holidays launches VIBE targeting Millennials  
The consumer  
Holiday participation remained stable amid Brexit uncertainties  
Figure 3: Destinations visited on holiday in the past 12 months, November 2018 vs November 2019  
City breaks most undertaken holiday type in the UK  
Figure 4: Types of holiday taken in the UK and overseas, November 2019  
Package holidays set to retain appeal for travellers' main holiday  
Figure 5: Likely booking method for main holiday in the next 12 months, November 2019  
Holidaymakers plan to take more holidays than last year  
Previous experience leading factor when choosing a package holiday provider  
Figure 6: Factors influencing choice of package holiday provider, by age, November 2019  
Brexit and company closures instil caution among holidaymakers  
Figure 7: Attitudes towards booking holidays, November 2019  
Local food and drink has great potential to put destinations on the map  
High demand for food experiences among the younger generation  
Figure 8: Interest in culinary experiences, by age, November 2019  
What we think

### Issues and Insights

Exploring destinations through food

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

# Holiday Review - UK - January 2020

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 facts

The implications

The battle in the package holiday market heats up

The facts

The implications

## The Market – What You Need to Know

Staycations support overall growth in holiday volume in 2019

Moderate growth expected for staycations between 2020 and 2024

Short-term outlook for overseas holidays remains cautious

Greece and Turkey fastest-growing overseas destinations

Package holidays going strong amid Brexit uncertainties

## Market Size and Forecast - Total

Staycations support overall growth in holiday volume in 2019

Figure 9: Forecast volume and value\* of domestic\*\* and overseas holidays taken by UK residents, 2014-24

Volume of holidays in 2020 will grow at a slightly faster pace than in 2019

Figure 10: Forecast volume of domestic\* and overseas holidays taken by UK residents (number of trips), 2014-24

Figure 11: Forecast value\* of domestic\*\* and overseas holidays taken by UK residents, 2014-24

Forecast methodology

## Market Size and Forecast - Domestic

Boost in staycations in 2019

Figure 12: Forecast volume and value of domestic holidays taken by British residents, 2014-24

Moderate growth expected for staycations between 2020 and 2024

Figure 13: Forecast volume of domestic holidays taken by British residents (number of trips), 2014-24

Figure 14: Forecast value of domestic holidays taken by British residents, 2014-24

Forecast methodology

## Market Size and Forecast - Overseas

Volume of overseas holidays declined in 2019 amid uncertainties

Figure 15: Forecast volume and value\* of overseas holidays taken by UK residents, 2014-24

Short-term outlook for overseas holidays remains cautious

Figure 16: Forecast volume of overseas holidays taken by UK residents (number of trips), 2014-24

Figure 17: Forecast value of overseas holidays taken by UK residents, 2014-24

Forecast methodology

## Market Segmentation

Demand for shorter breaks continues to increase

Figure 18: Volume for overseas holidays and domestic holidays, by length of stay, 2015-18

Staycations more likely to benefit from the UK's ageing population

Figure 19: Volume, nights and spend for overseas holidays and domestic holidays, by age, 2018

Package holidays going strong amid Brexit uncertainties

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

# Holiday Review - UK - January 2020

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 20: UK volume of overseas package and independent holidays, 2015-18

Greece and Turkey fastest-growing overseas destinations

Figure 21: Top 10 overseas holiday destinations for UK holidaymakers, H1 2017-H1 2019

## Market Drivers

Consumers saved more in 2019, putting spending levels under pressure

Figure 22: Added to savings in the past three months, 2018 versus 2019

Timing of Brexit could delay holiday bookings

Figure 23: Booked a holiday in the past three months versus plans to book a holiday in the next three months, November 2018 versus November 2019

Election result had a positive impact on sterling's value

Figure 24: Pound versus euro and US dollar, 1 April 2016-31 December 2019

## Companies and Brands – What You Need to Know

easyJet launches its new holiday business

Jet2holidays launches VIBE targeting Millennials

Train operators Eurostar and Thalys have proposed a merger

British Airways uses AI and video technology to improve punctuality

High potential to capture market share following Thomas Cook collapse

## Launch Activity and Innovation

New launches in the package holiday market

easyJet launches its new holiday business

Jet2holidays launches VIBE targeting Millennials

Train operators are increasing their focus on the holiday market

Night trains are being re-introduced

Train operators Eurostar and Thalys have proposed a merger

New AI innovations to increase efficiency

British Airways uses AI and video technology to improve punctuality

TUI uses AI to help answer client queries

Travel brands are improving their sustainable practices

Intrepid Travel Group committed to be climate positive by 2020

TUI launches 'Big Up Small Business' initiative to support local companies

## Brand Usage and Perceptions – Package Holiday Providers

High potential to capture market share following Thomas Cook collapse

Figure 25: Key metrics for selected brands, April 2019

TUI and Jet2holidays look well positioned to appeal to former Thomas Cook customers

Figure 26: Attitudes of 'committed' Thomas Cook customers, by brand, April 2019

## The Consumer – What You Need to Know

Holiday participation remained stable amid Brexit uncertainties

City breaks most undertaken holiday type in the UK

Package holidays set to retain appeal for travellers' main holiday

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](https://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](mailto:reports@mintel.com)

# Holiday Review - UK - January 2020

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.

- Younger generation more likely to rely on customer reviews
- Brexit and company closures instil caution among holidaymakers
- Local food and drink has great potential to put destinations on the map
- High demand for food experiences among the younger generation

## Holiday Destinations Visited

- Holiday participation remained stable amid Brexit uncertainties  
Figure 27: Destinations visited on holiday in the past 12 months, November 2018 vs November 2019
- Highest participation levels in holidays to England and Spain  
Figure 28: Destinations visited on holiday in the past 12 months, by country, November 2018 vs November 2019

## Types of Holidays Taken

- City breaks most undertaken holiday type in the UK  
Figure 29: Types of holiday taken in the UK and overseas, November 2019

## Holidaying Intentions

- Package holidays set to retain appeal for travellers' main holiday  
Figure 30: Likely booking method for main holiday in the next 12 months, November 2019
- Holidaymakers plan to take more holidays than last year  
Figure 31: Plans for all holidays in the next 12 months, by frequency, November 2019

## Factors Influencing Choice of Package Holiday Provider

- Previous experience leading factor when choosing a package holiday provider  
Figure 32: Factors influencing choice of package holiday provider, November 2019
- Younger generation more likely to rely on customer reviews  
Figure 33: Factors influencing choice of package holiday provider, by age, November 2019

## Consumer Sentiment towards Booking Holidays

- Brexit and company closures instil caution among holidaymakers  
Figure 34: Attitudes towards booking holidays, November 2019
- Younger generation and families with children more likely to be cautious  
Figure 35: Attitudes towards booking holidays following the collapse of some travel companies, by demographics, November 2019

## Food and Drink Tourism

- Local food and drink has great potential to put destinations on the map  
Figure 36: Influence of local food and drink on the destination choice, domestic versus overseas, November 2019
- High demand for food experiences among the younger generation  
Figure 37: Interest in culinary experiences, by age, November 2019
- Food and drink more likely to impact destination choice of male urban citizens aged 16-44  
Figure 38: Influence of local food and drink in overseas destination choice, CHAID analysis, November 2019

## Appendix – Data Sources, Abbreviations and Supporting Information

- Abbreviations
- Consumer research methodology

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)

## Holiday Review - UK - January 2020

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.

Chaid analysis methodology

Figure 39: CHAID analysis – Table output, November 2019

### Appendix – Market Size and Forecast

Volume forecast for total holidays

Figure 40: Forecast volume of total holidays (domestic\* and overseas) taken by UK residents, 2019-24

Value forecast for total holidays

Figure 41: Forecast value\* of total holidays (domestic\*\* and overseas) taken by UK residents, 2019-24

Volume forecast for domestic holidays

Figure 42: Forecast volume of domestic holidays taken by British residents, 2019-24

Value forecast for domestic holidays

Figure 43: Forecast value of domestic holidays taken by British residents, 2019-24

Volume forecast for overseas holidays

Figure 44: Forecast volume of overseas holidays taken by UK residents, 2019-24

Value forecast for overseas holidays

Figure 45: Forecast value\* of overseas holidays taken by UK residents, 2019-24

Forecast methodology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://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](mailto:reports@mintel.com)