

AVIAREPS®

TOURISM TRENDS

IN THE UNITED KINGDOM

KATERINA TOMINA



An aerial photograph of London, England, showing the River Thames winding through the city. The Tower Bridge is prominent in the foreground, and the dense urban landscape extends to the horizon. The image is framed by a thin yellow border with a dotted line inside.

***EMERGING TRAVEL TRENDS
IN THE UNITED KINGDOM***



OVERVIEW

\$49.1k

2023 GDP per capita

Top 5

Biggest source markets

+1.2%

Airline capacity out of UK
vs 2019

£724 billion

Estimated spending abroad in
2023 +16% vs 2019

£145 billion

Estimated worth of outbound
travel market by 2032

86.9 million

Predicted UK departures
by 2024

86.2 million

UK departures in 2023

93.1 million

UK departures in 2019



2024 TRENDS



All-year-round/ shoulder season travel



Sustainability concern vs greenwashing



Cruises are still top of the list



Leisure for longer: staying for one extra day



Value for money remains a priority for British travellers - Duping and All Inclusive



Travelling for events and gigs



Appetite for city breaks grew more than other types of holidays: 2nd position after the beach holidays



Typically for Britain, weather is the most influential factor in destination decision-making. 42% of all overseas trips to Europe



Set-jetting has never been more popular in the UK



Food trips: 52% of Brits say it's their favourite thing to do on holiday. In fact, 11% of Brits say they've visited a destination specifically for a restaurant

An aerial night view of London, featuring the River Thames, the Tower Bridge, and numerous illuminated buildings. The text 'CHANGING TRAVELLER BEHAVIOUR' is overlaid in the center in a bold, white, italicized font. The entire scene is framed by a thin yellow border with a dotted line pattern.

***CHANGING TRAVELLER
BEHAVIOUR***



CHANGING TRAVELLER BEHAVIOUR

- **Return of stability** in holiday planning. **Decisive factors** when choosing a holiday are consistent
- **Europe** remains **the top target** by some margin
- **Financial circumstances** are less of a barrier this year. Brits are still **keen on spending on holiday experiences** but will skip shopping part. Guilt is #1 feeling around non-essential spending
- By June **20% still haven't booked their holidays but plan to.**
- Brits cannot get enough **cruises** both for this year as last minute and for 2025-2026
- **Affluent travellers** spend so much more on cruises than pre-pandemic
- **Millennials** become new audience for cruises, although still behind Continental Europe trend
- **Value to get in the destination and cost control** - All inclusive and cruises growth across different demographics



CHANGING TRAVELLER BEHAVIOUR

- **Sustainable choices** are important but mainly if someone picks up the cost of it.
- The gap between **holidaying in Britain and going abroad** is almost back to pre-pandemic
- 70+% of luxury travellers come from **diverse traveller demographics**: very important factor for marketing and product: diversity, inclusion, respect, safety, being seen but not exposed.
- The **difference in income** between a mainstream traveller and a Premium globetrotter is only 12%.
- Consumers are **diversifying how they search**: it's changing, becoming more complex and more expensive
- **TikTok** is not #1 in reach but potentially the future as it's the only trusted source of information for Gen Z. It also has the highest engagement rate for Travel & Hospitality.
- 80+% of travellers are **destination-indifferent**



Thank you!

Sources:
Office for National Statistics,
ABTA Travel Marketing Conference,
TGI Consumer Data Kantar Media,
MasterCard Travel Trends 2024



Economy

- GDP: -0,8% (2023) & +0,2% 1st quarter 2024
- 2024 & 2025 slight growth projected
- 25+ days of paid holiday (19 days planned)

Key Players

TUI Travel / TUI Austria

- Largest tourism company in Europe

BILLA Reisen / REWE Group

- Part of REWE Austria Touristik GmbH

Ruefa

- part of VERKEHRSSBUERO (Eurotours)

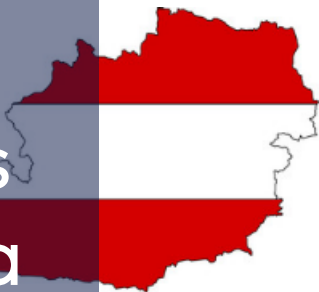
Austrian Airlines

- Largest airline in Austria

Forecast behavior 2024

- 2024 shaping up to be an extremely positive year for travel
- 89% of the Austrian population plans to travel
- Age plays a significant role: 93,3% of Generation Z express their plans to take at least one vacation
- Only 29% are bound by school holidays
- Noticeable trend outside the traditional holiday peaks (May, September & October)
- Vacation budgets increased – avg. budget: € 1.882 p.P.
- Main vacation: 8-14 days – typically beach vacation

Travel
Trends
Austria



Representative Survey

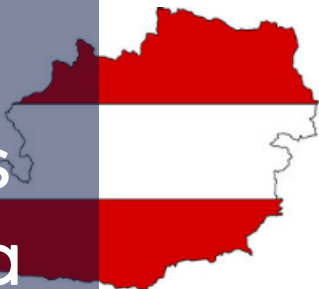
Generation	Domestic vacation	European country	overseas
Generation Z (1994 – 2010)	57%	83%	33%
Millenials (1980 - 1993)	68%	79%	22%
Generation X (1965 – 1979)	68%	78%	17%
Baby Boomer (1946 – 1964)	80%	73%	18%
Traditionalists (1922 – 1945)	67%	67%	--

(Marketagent, 2024)

Austrian Market Conclusion

- return to pre-pandemic levels of holiday enthusiasm + positive outlook for 2024
- growing desire for high-quality vacations - budgets increased
- trend towards longer vacation days continues
- 2024 is shaping up to be an extremely positive year for travel

Travel
Trends
Austria



Economy

- GDP: +0,7% (2023) & +0,3% 1st quarter 2024
- 25+ days of paid holiday
- tourism as one of the most important sectors

Key Players

Hotelplan Suisse

- Swiss Tour Operator and part of the Hotelplan Group

Kuoni Reisen (DER Touristik Swiss AG)

- Market-leading Swiss tourism company

TUI Suisse Ltd

- one of the country's largest travel companies

Swiss

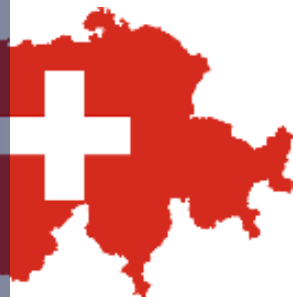
- National Airline of Switzerland and part of Lufthansa Group

Edelweiss Air

- Sister Company of Swiss and part of Lufthansa Group

Forecast behavior 2024

- Most popular destinations 2024:
 - Thailand, Maldives, Tanzania
 - in Europe: Northern Europe, Greece, Italy, Spain and Portugal
 - winter season: Lapland in Finland; summer season: US and Canada
- Top holiday motivations: beach holidays (36%), individual long-distance journeys (34%)
- Bookings are made 90-120 days in advance → pre-pandemic
- Increasing Interest in sustainable accommodations
- Spending behavior is similar to 2023 → 3.443 CHF



Which region will become a trend region in 2024?

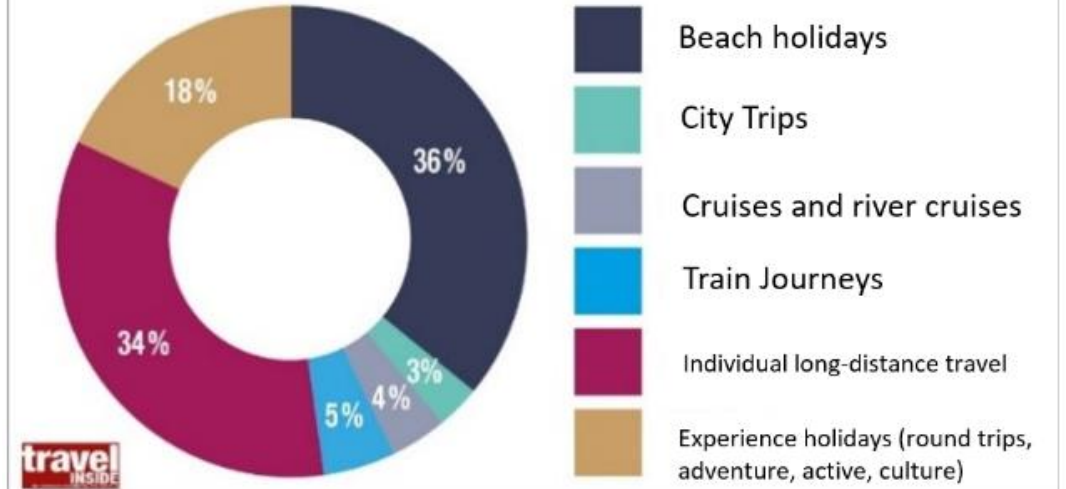


1. Northern Europe 17%



2. Asia/Far East	15%
3. North America	14%
4. Central & South America	13%
5. Eastern Mediterranean	11%
6. Australia / Pacific	10%
Western Mediterranean	10%
8. Southern Africa	6%
9. Middle East / Arabia	3%
10. Indian Ocean	1%

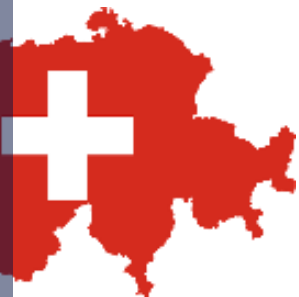
Which type of trip will be the most popular?



Swiss Market Conclusion

- Northern Europe is most trending region for 2024
- willingness to plan longer stays or indulge in more luxurious amenities
- spending behavior of tourists in 2024 will generally be similar to 2023
- Sun and beach holidays remains top travel motivation

Travel Trends Switzerland

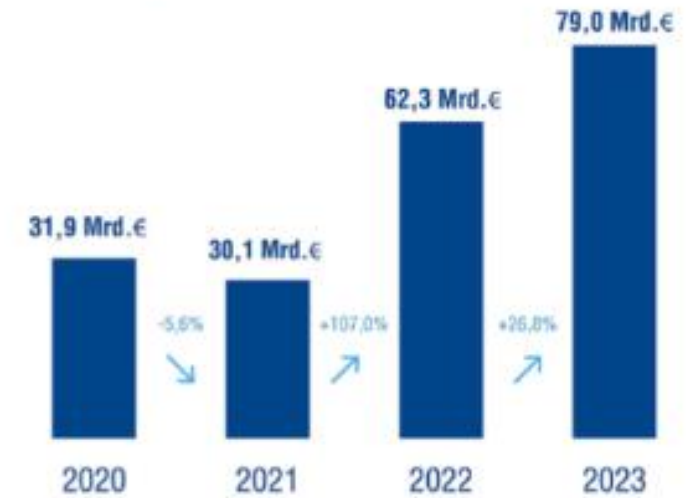


Economy

- GDP: -0,2% (2023) & +0,2% 1st quarter 2024
 - 20+ days of paid holiday
 - citizens will spend a total of 79 billion € on travel services
 - Travel and vacations rank at the top of expenditures for wealthy Germans
 - 23% are uncertain if a holiday fits into their budget due to general price increases (fuel, heating, groceries)
 - Air passenger volume of 197 Mio.
 - 5 largest airports: FRA, MUC, BER, DUS, HAM
- decentralised market

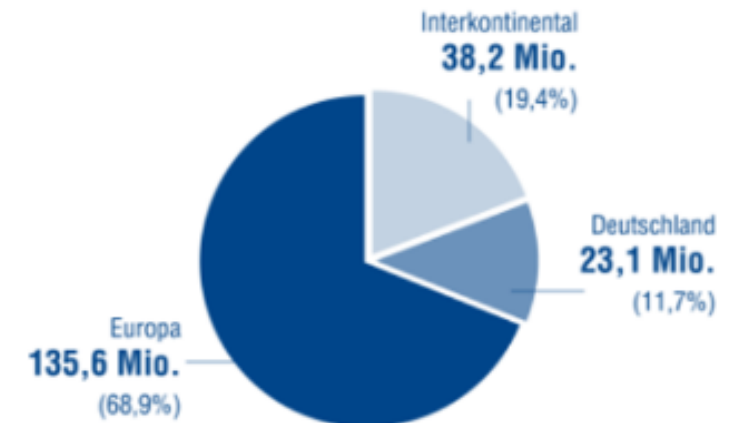


Travel expenses of Germans



Passenger volume in air traffic

In Germany



(DRV, 2024)

Key Players

TUI Deutschland

- Largest tourism company in Germany/Europe

DER Touristik

- Part of REWE Group

FTI Group

- Filed for insolvency in June 2024

Schauinsland-Reisen

- The family-run company ranks third among German air tour operators

Alltours

- largest independent tour operator in Germany



Lufthansa

- National carrier & largest airline in Europe

Condor

- One of Europe's leading leisure airlines

Discover Airlines

- Part of Lufthansa Group



Lufthansa

condor 

discover.
airlines



Forecast behavior 2024

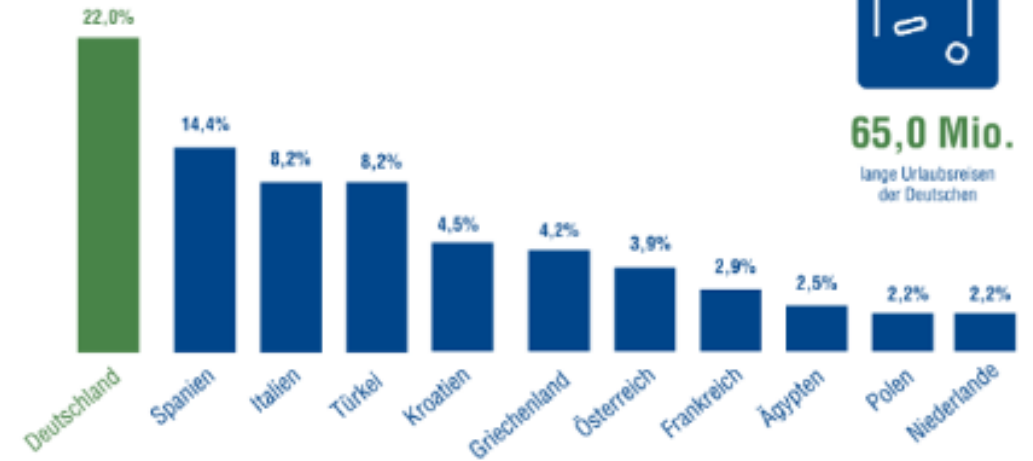
- 2/3 of the German population plan one or more holidays (especially in the summer months)
- DRV (German travel association) records an increase in revenue despite a slight decline in the number of travellers
- focus on one or two main holiday trips
- Germany will remain most popular holiday destination
- most popular package destination flights: Turkey and Greece
- Long-haul destinations: increase in travellers by 11% (UAE, USA, Namibia, Japan, Sri Lanka and Australia)
- Average vacation duration: 13,3 days (13,0 pre-covid)
- Germany as one of the main markets for the cruise industry

Travel
Trends
Germany



Most popular holiday destinations

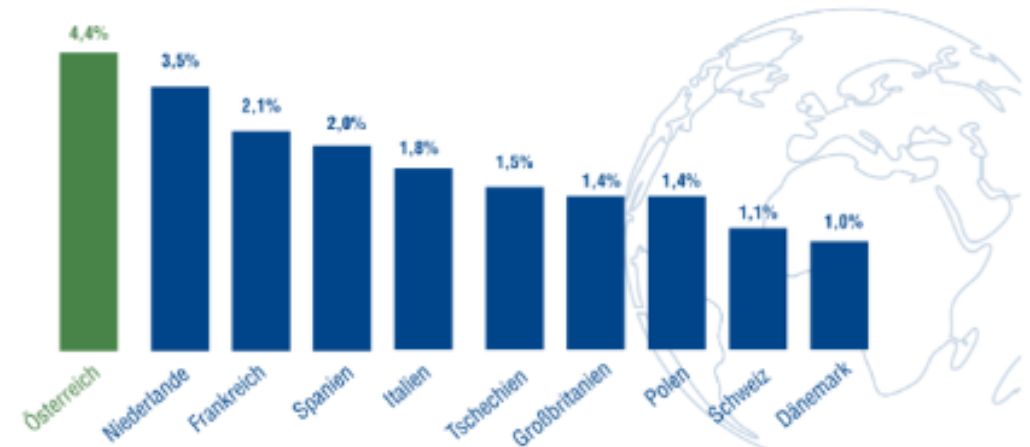
Number of holidays lasting 5 days or more



65,0 Mio.
lange Urlaubsreisen
der Deutschen

Short holiday destinations abroad

Proportion of all short trips, duration two to four days



(DRV, 2024)

Tour Operators

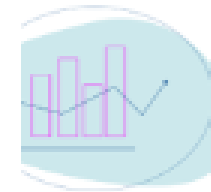
- Germany as one of the biggest markets for Tour Operator package holidays (47% market share)
- Turnover in tour operator trips in 2023 represents 37,3 billion €, 31% higher than 2022¹
- increased demand for individual customization, personalization and new unknown destinations → Tour Operators need to adjust portfolio

Travel Designers & Agencies

- Turnover of € 20,7 billion (€ 16,4 billion in 2022)
- Cruise with the most significant gain: 41% revenue growth
- crucial role in luxury travel by providing personalized services and catering to individual requirements
- most popular: beach resort vacations and city trips (culture)
- nature-connected travel and green tourism as significant factor for growth

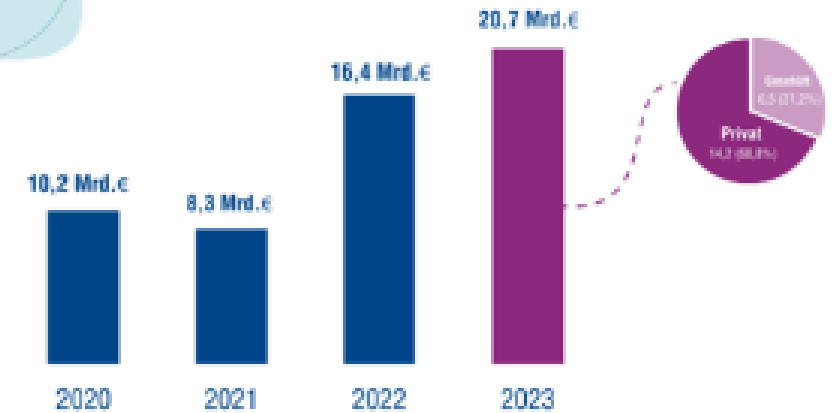


Turnover of tour operators



Turnover of travel agencies

with holiday and business trips



Online Travel Agencies

Booking.com

Expedia

HolidayCheck

CHECK24

opodo

Skyscanner

lastminute.com

TRAVELZOO®

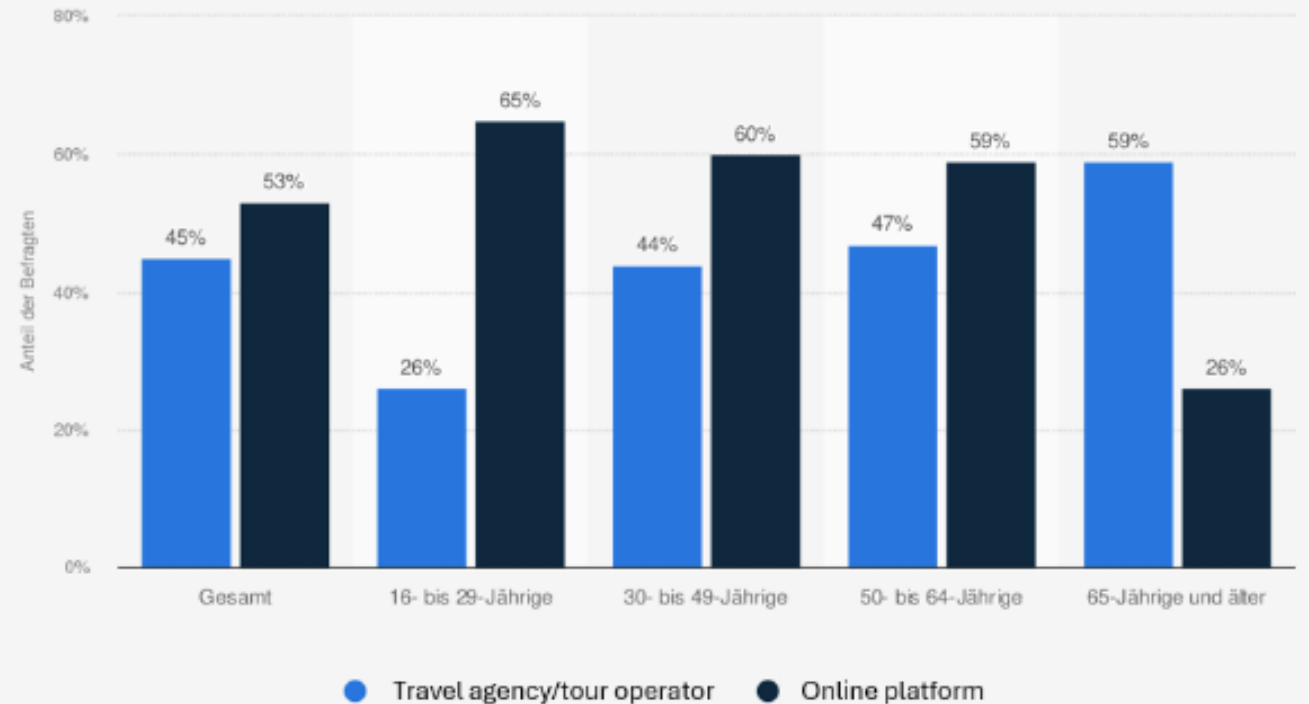
GET YOUR GUIDE

Travel Trends Germany



Booking behaviour

Where do you prefer to book holiday services such as accommodation, flights or other means of transport?



Quelle:
Bilkom Research
© Statista 2024

Weitere Informationen:
Deutschland; KW21 bis KW24 2022; 935 Befragte; ab 16 Jahre; Personen aus Deutschland; Telefonische Befragung

German Market Conclusion

- 2/3 of the German population plans on going on one or more holidays
- High demand especially for holidays during summer months
- Revenue for tour operators: full recovery expected by 2024
- Overall positive development for long-haul destinations
- Individual customization, personalization and new unknown destinations are key for further growth within the TO sector
- Consumer trends in luxury travel highlight a desire for beach resort vacations and city trips. → Travel agencies play a crucial role
- Total revenues of German travel agencies increased by 30.8%, with the cruise segment experiencing the most significant expansion (+41%)
- Online booking trends (53%) continue to grow in importance
- Booking channels vary significantly based on travellers' age groups.

