

The UK Outbound Holiday Market

Ian Taylor

Executive Editor
Travel Weekly



travelweekly
insight

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Annual Report 2018-19



**Hands up if you plan to keep travelling:
Resilience in uncertain times**

Produced by Travel Weekly, with exclusive consumer research

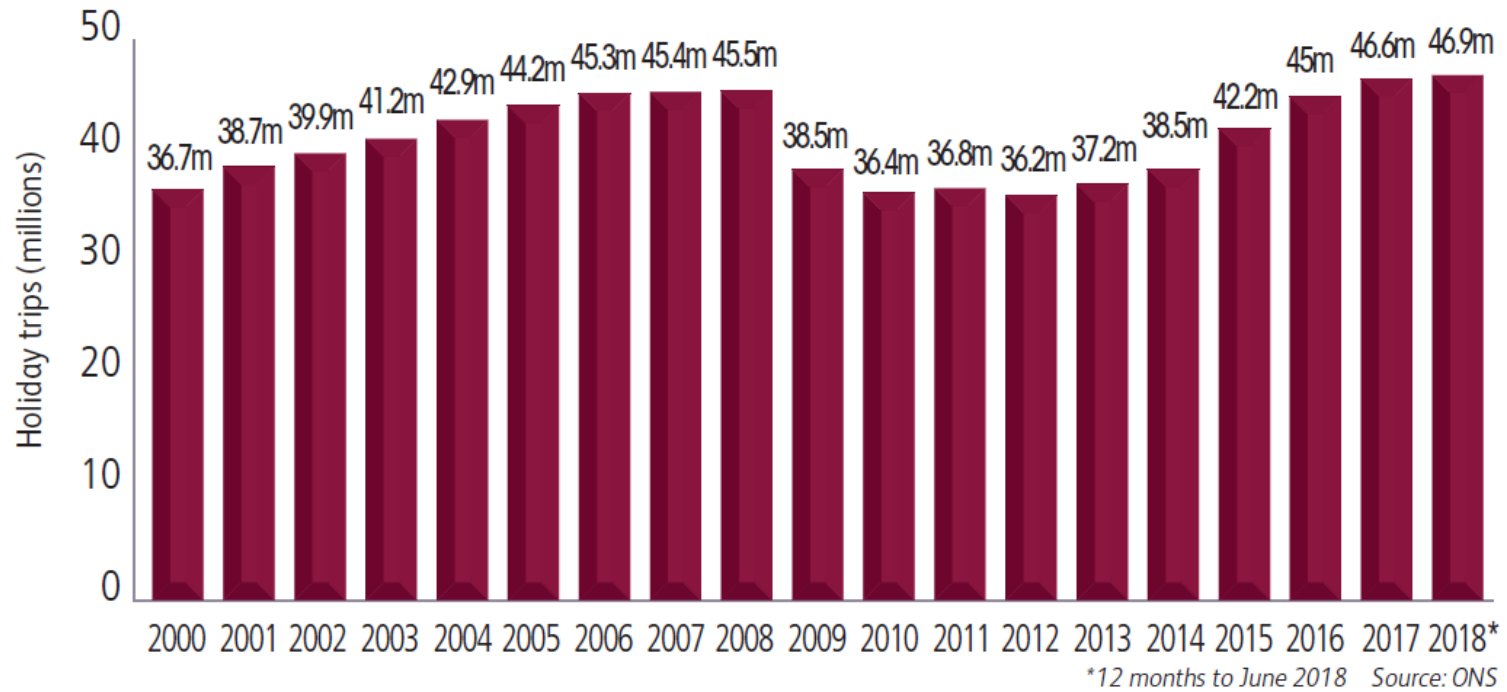
2017 overseas,
inbound & domestic
holiday numbers
at **RECORD** levels

2018
4 point increase in adults
taking overseas holiday

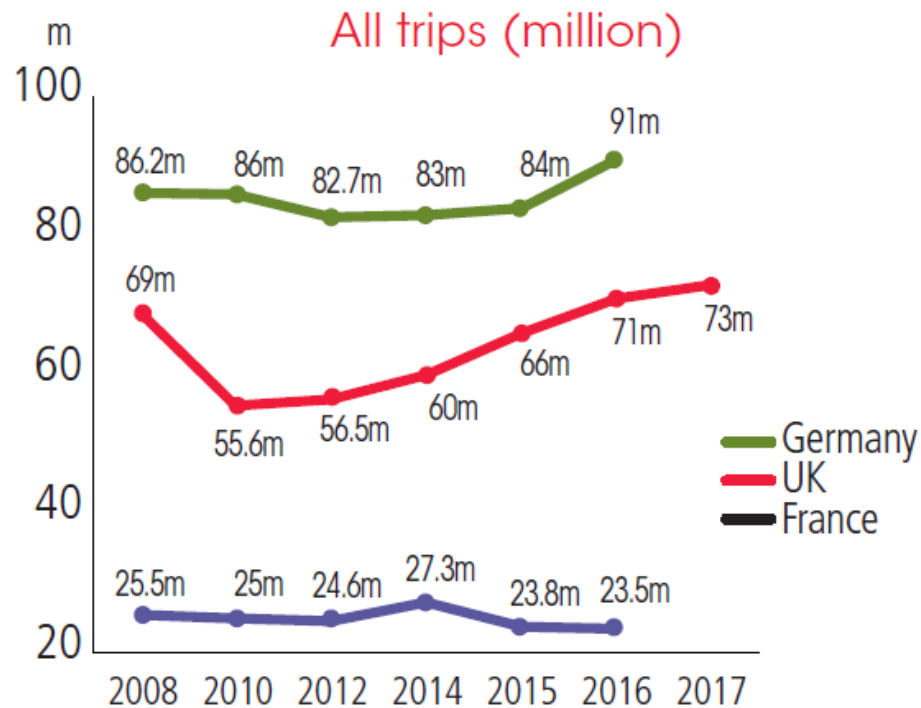
UK OUTBOUND HOLIDAY MARKET, 2018



UK HOLIDAYS ABROAD, 2000-18

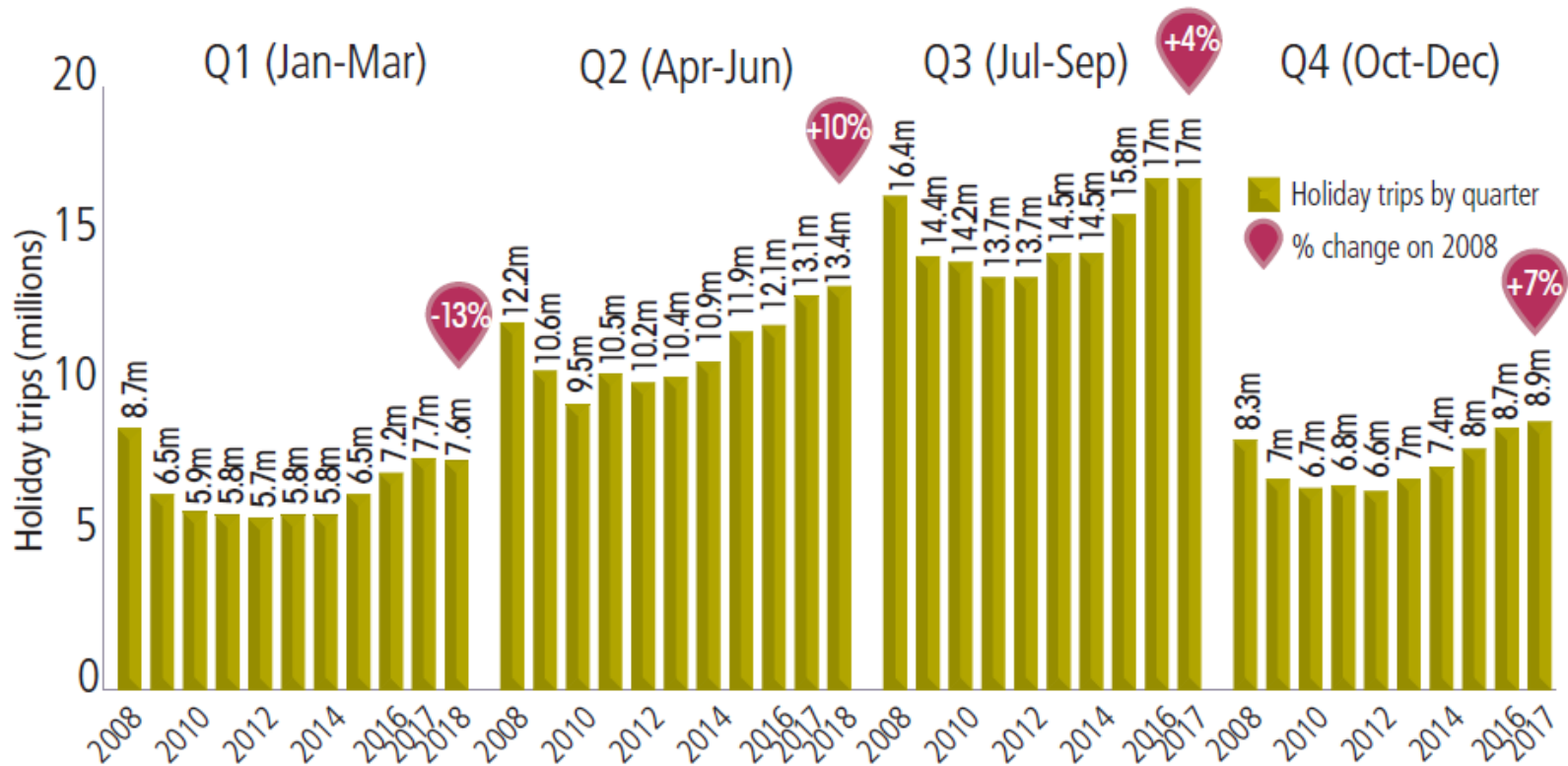


TOP-THREE EU OUTBOUND MARKETS: 2008-17



OVERSEAS HOLIDAYS FROM UK, 2008-18

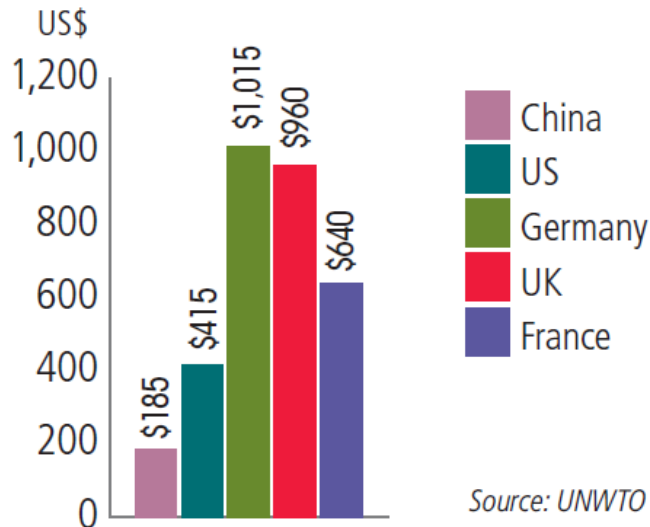
Holiday trips by quarter and % change on 2008



Source: ONS

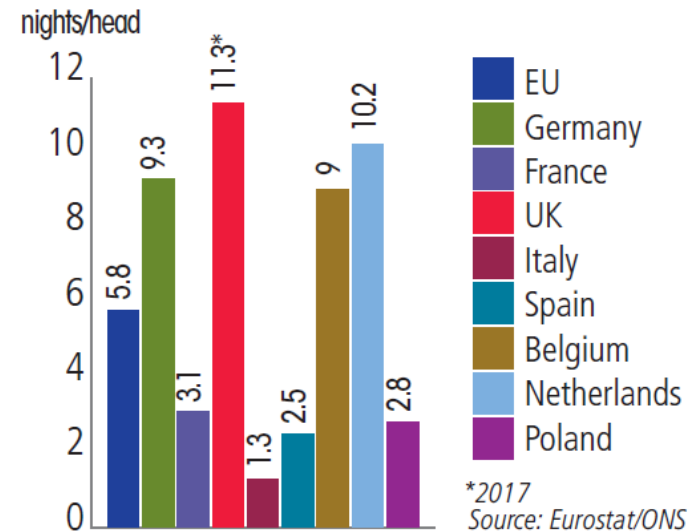
TOP-FIVE INTERNATIONAL SOURCE MARKETS

Spending per head

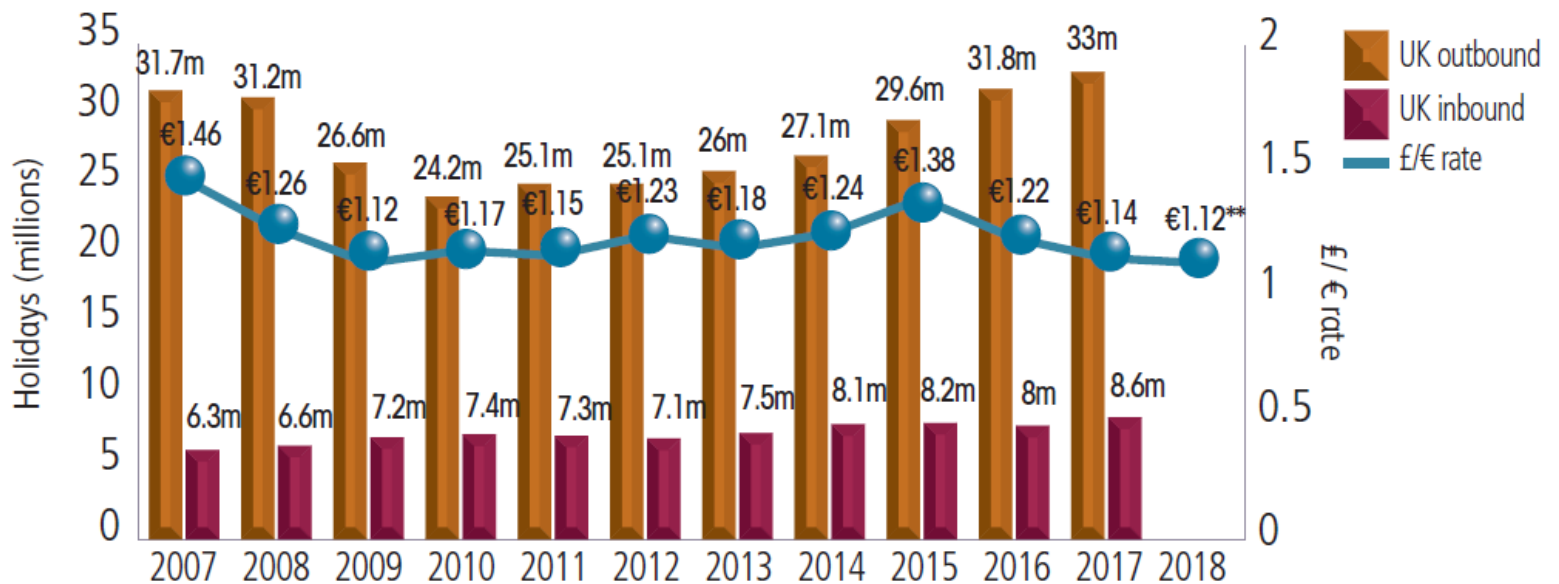


OUTBOUND NIGHTS PER HEAD

EU & biggest EU markets, 2016

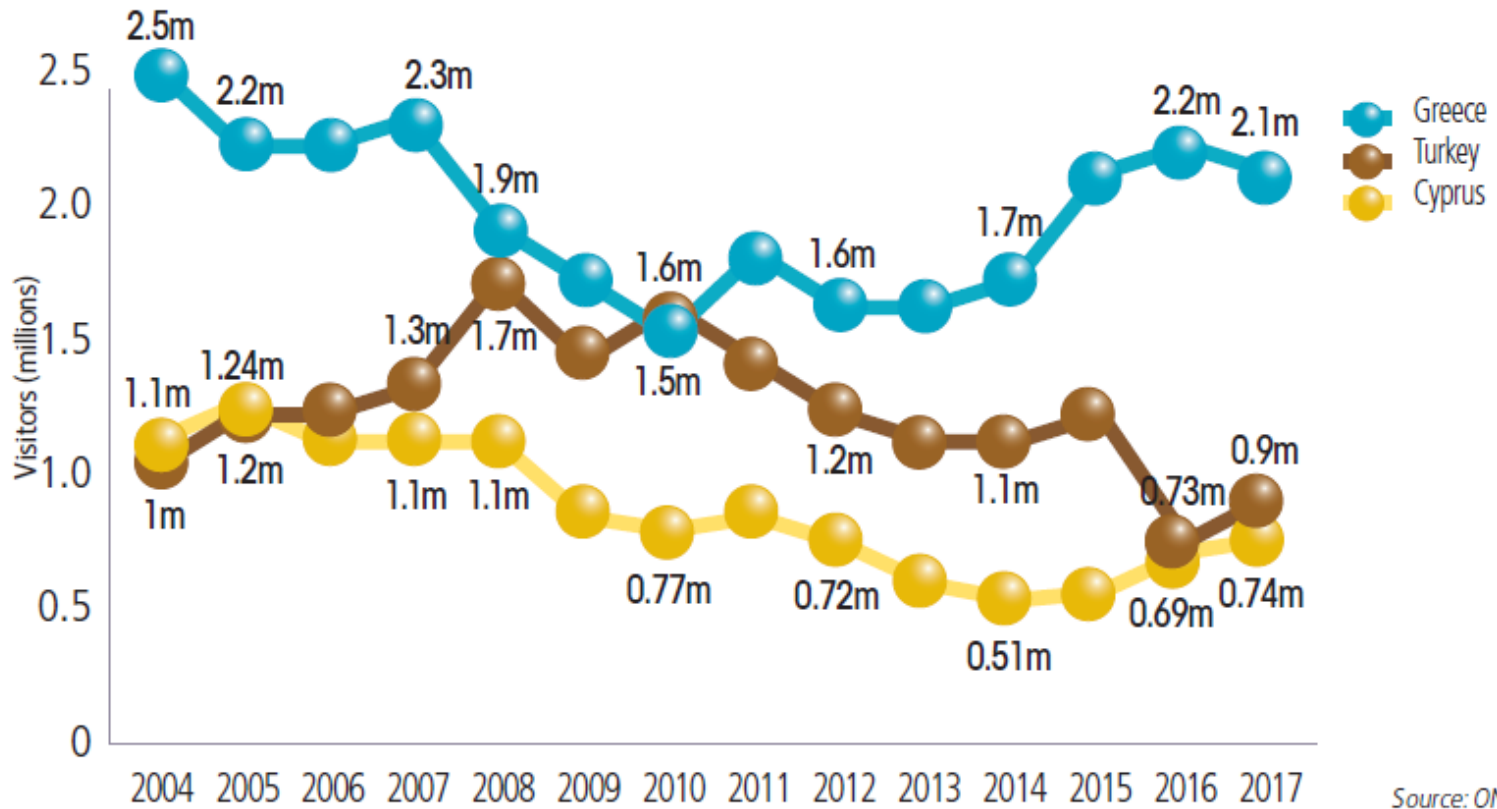


UK-EUROZONE HOLIDAYS* AND EXCHANGE RATE, 2007-18



*EU15 states, includes main eurozone destinations but excludes Cyprus, Malta & Slovenia **Sept rate Figures rounded Source: ONS/UK Treasury

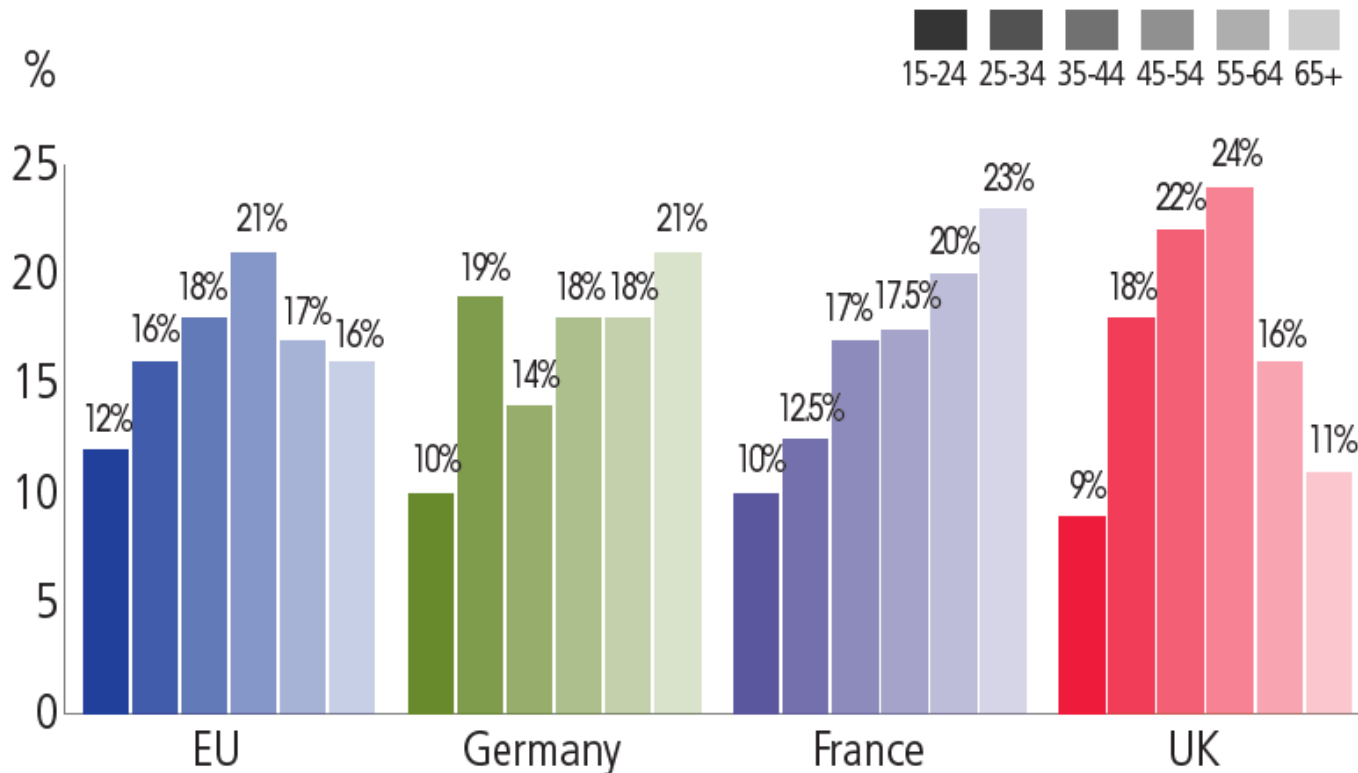
UK HOLIDAYS TO EASTERN MED, 2004-17



Source: ONS

OUTBOUND TRAVEL SPENDING, BY AGE

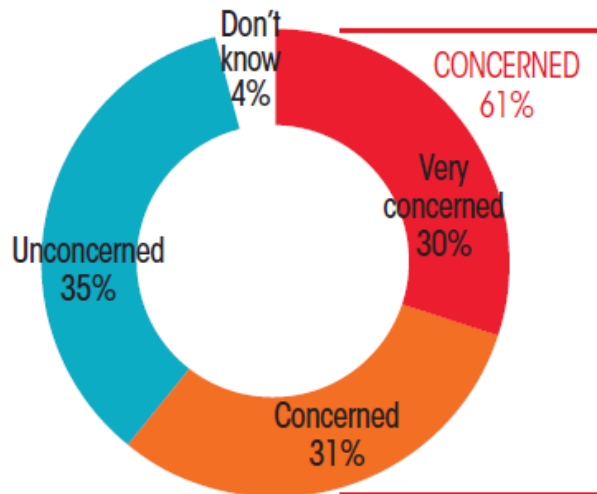
% of source market total (aged 15+)



Source: Eurostat 2016

HOLIDAYMAKERS' CONCERN ABOUT BREXIT

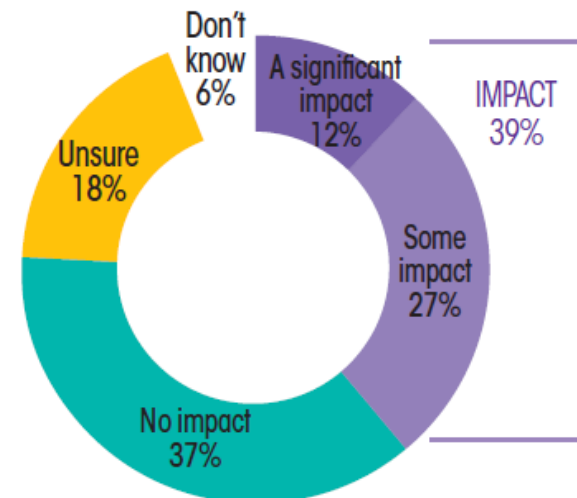
% of UK adults planning an overseas holiday



Source: Kantar TNS, October 2018

BREXIT'S IMPACT ON OVERSEAS HOLIDAYS

% of UK adults planning an overseas holiday who think Brexit will have:



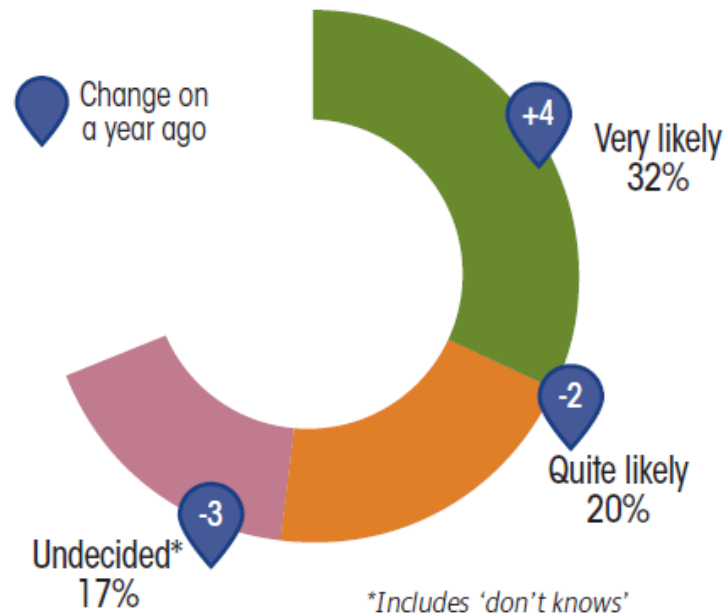
Source: Kantar TNS, October 2018

3 in 5 UK
outbound
holidaymakers
concerned about
Brexit

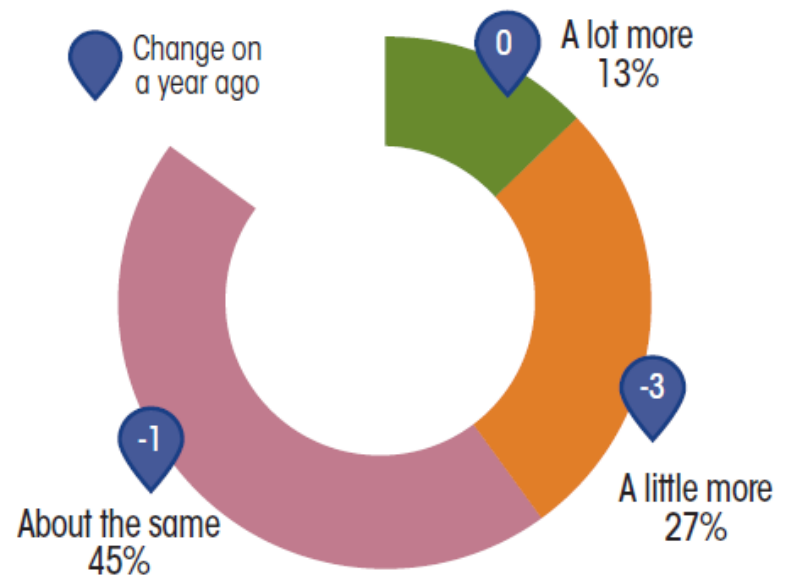
2 in 5
fear
'some
impact'
of Brexit
on travel

OVERSEAS HOLIDAY DEMAND FOR 2019

LIKELIHOOD OF OVERSEAS HOLIDAY



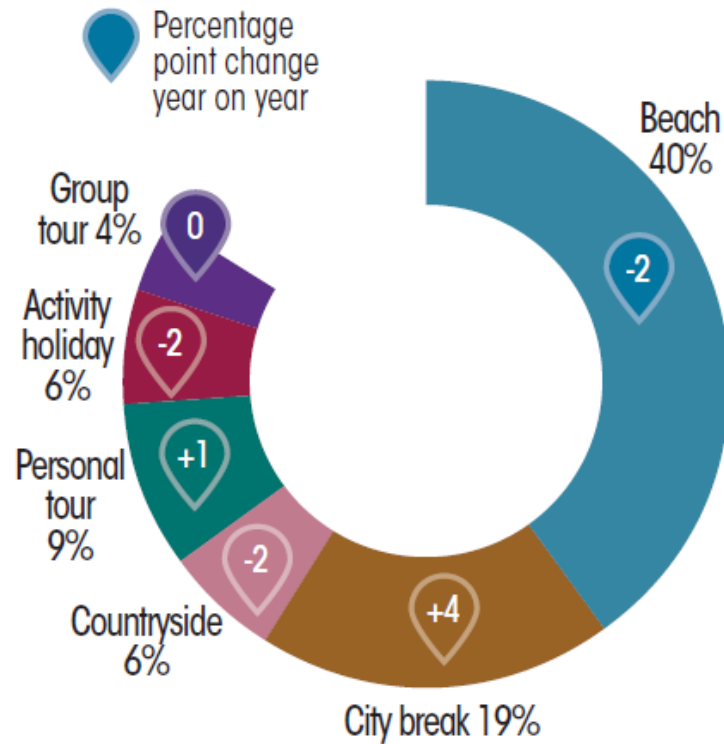
LIKELY SPEND



three point
FALL in
intention to **spend**
more
on holiday

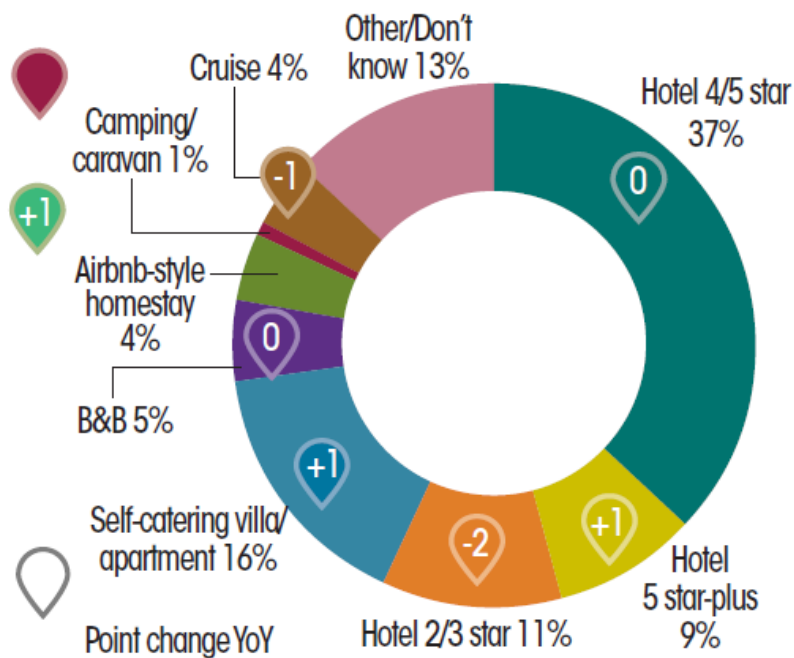
2^{pt}
INCREASE
in intent to take
overseas
holiday in 2019

TYPE OF NEXT OVERSEAS HOLIDAY

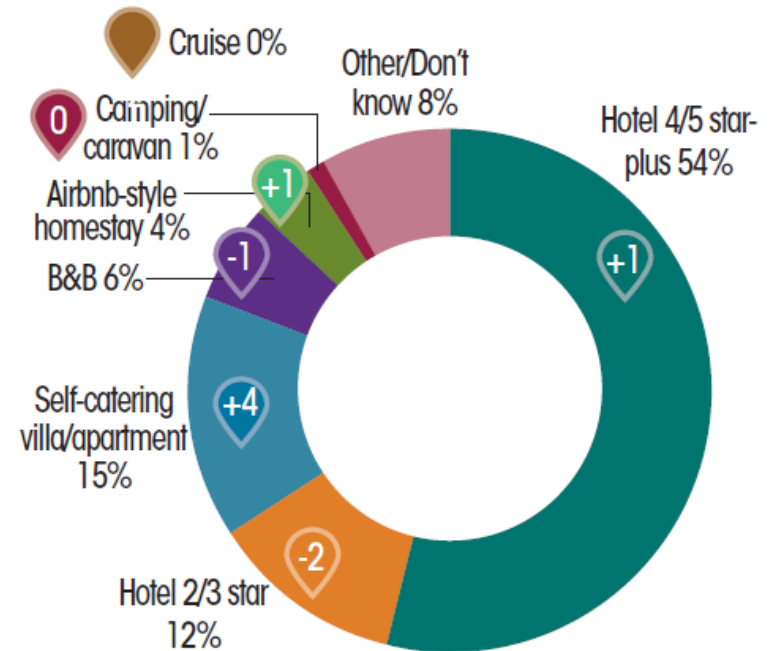


LIKELY ACCOMMODATION: NEXT OVERSEAS HOLIDAY

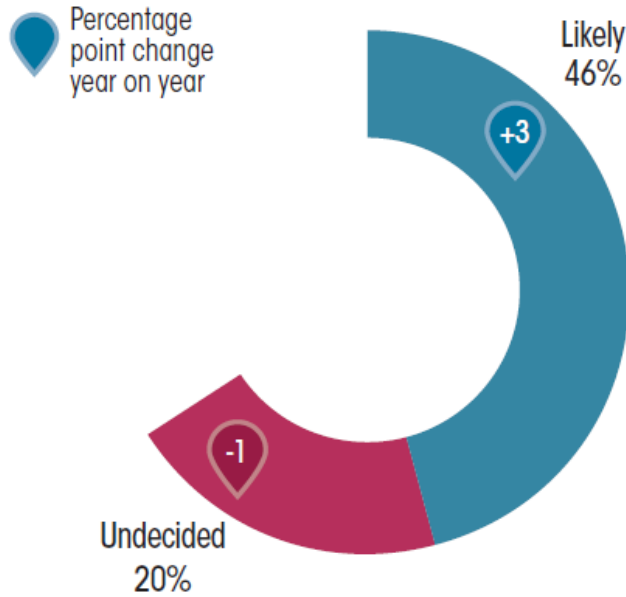
All holidaymakers



Those with children



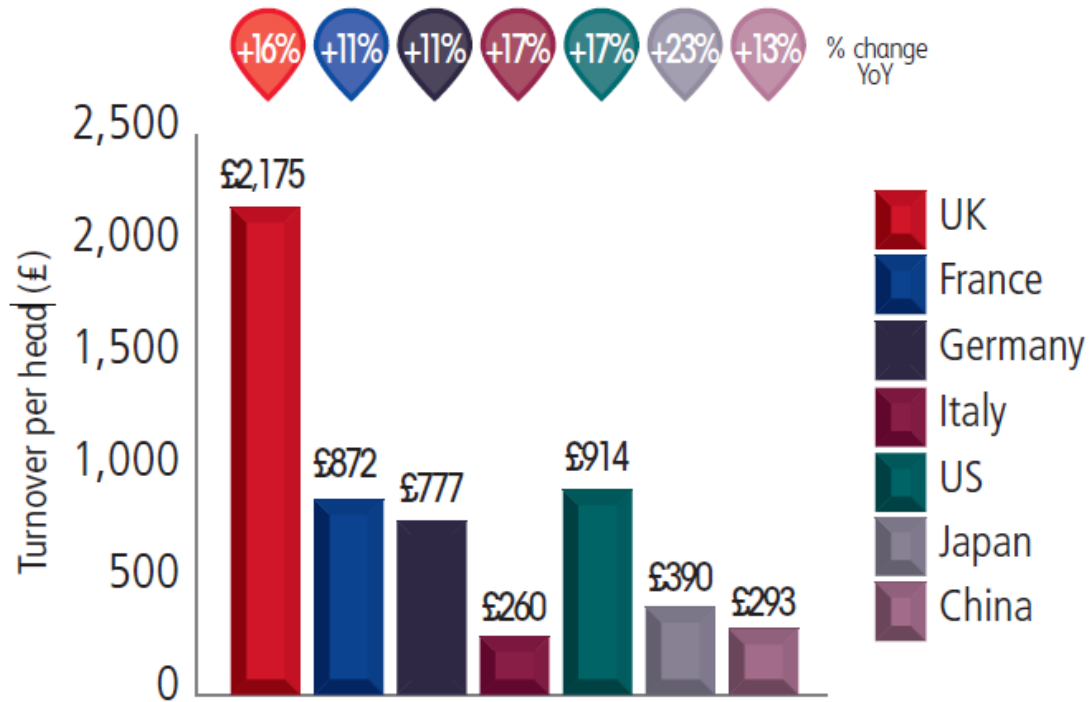
LIKELIHOOD OF BOOKING ALL-INCLUSIVE OVERSEAS HOLIDAY 2019



3pt INCREASE
in likelihood
of all-inclusive
holiday

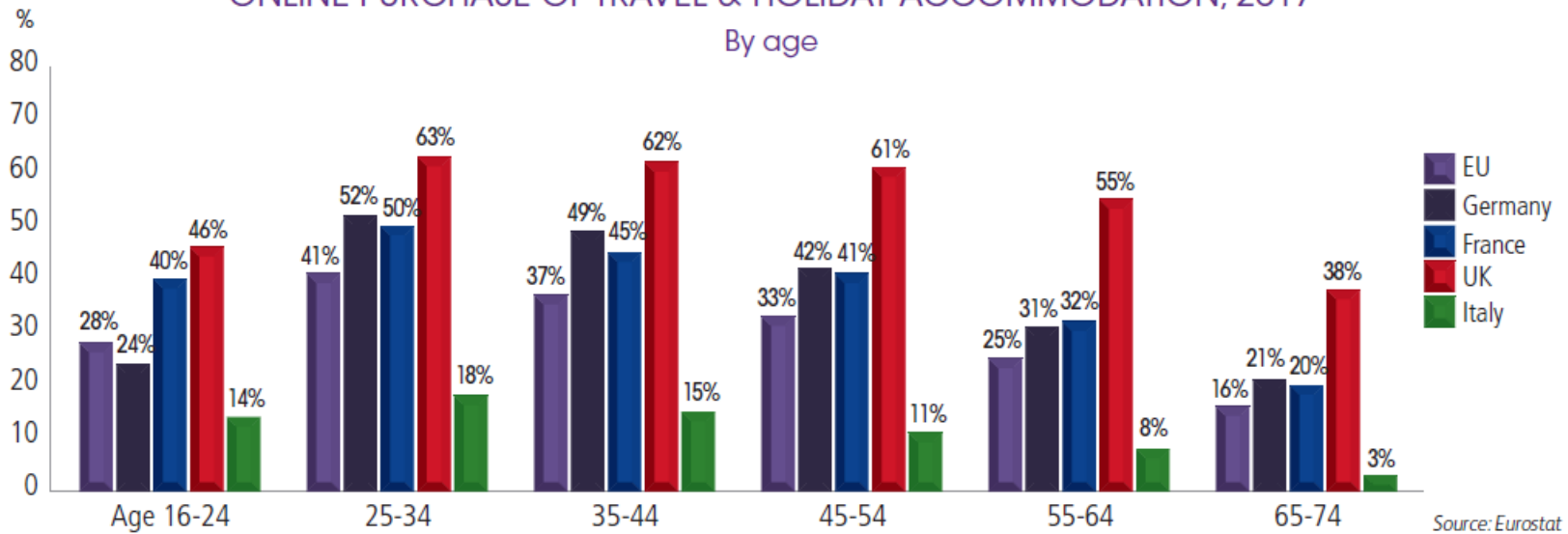
ANNUAL B2C E-COMMERCE TURNOVER

At £ exchange rate of €1.22 & \$1.35

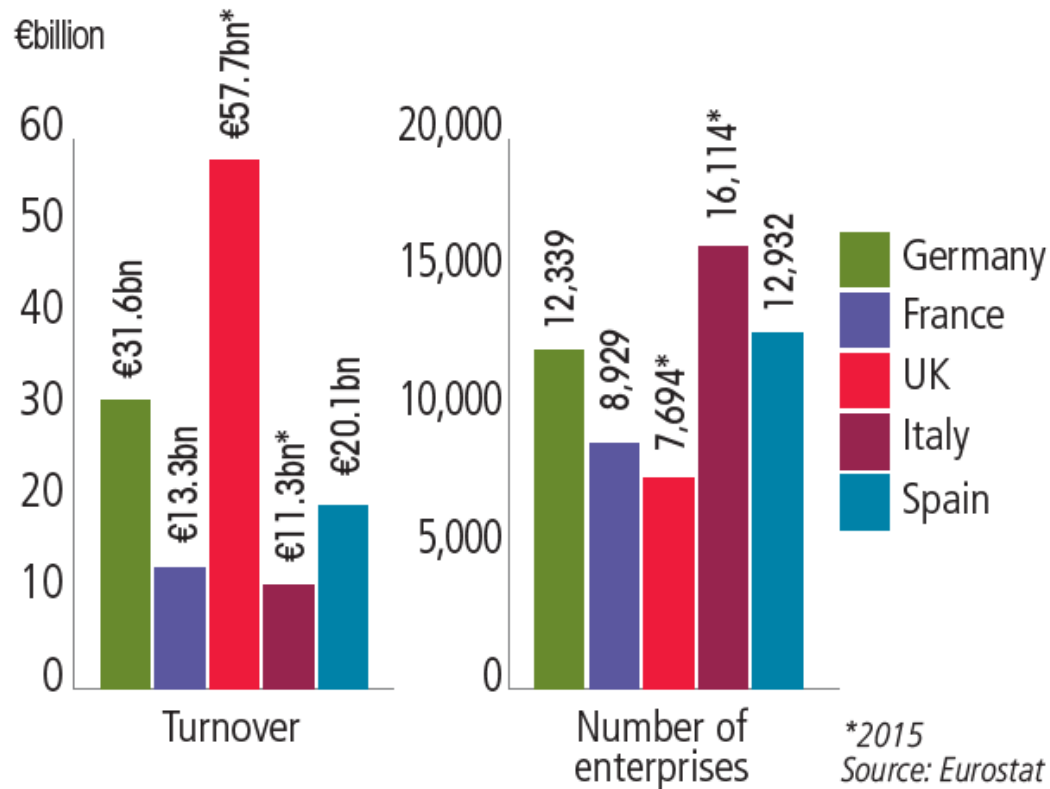


Source: Ofcom 2017

ONLINE PURCHASE OF TRAVEL & HOLIDAY ACCOMMODATION, 2017
By age



TRAVEL AGENCY AND TOUR OPERATOR RESERVATIONS: 2016



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