



ABTA's FOUR TRENDS FOR '24

Data behind this

- UK nationally representative sample of 2,000 people.
- Research was carried out last two weeks of August 2023.
- We ask people about their travels during the 12-month period up until August 2023, and the plans for the coming 12 months.
- When we refer to last 12 months, we mean the 12 months up until the end of August. And the coming 12 months are from September 2023 onwards.

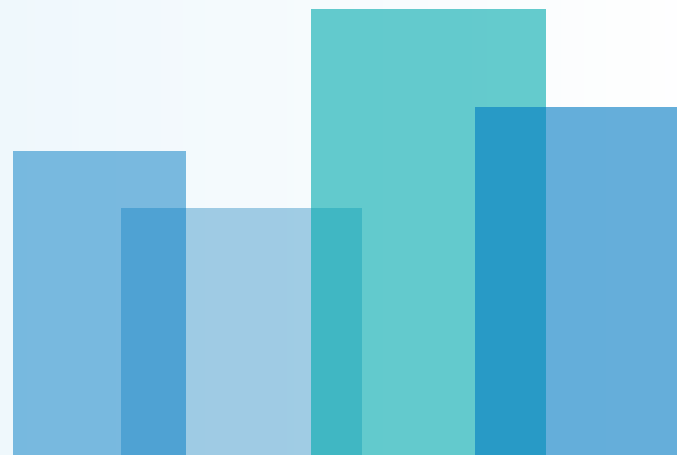
GENERATION T

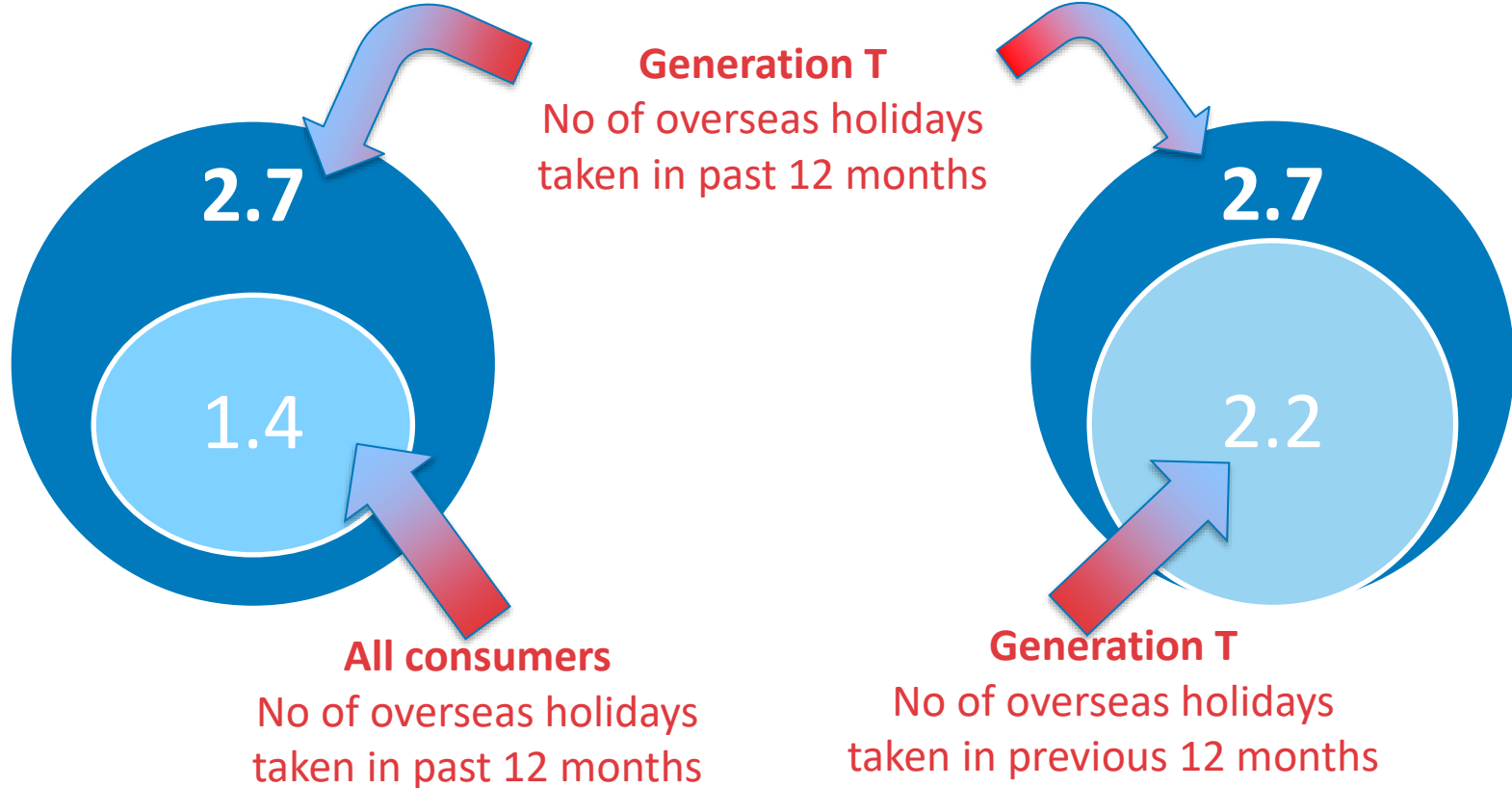
Generation T (Generation Travel) are 18–24-year-olds with a strong propensity to travel and with different focuses/interests to the average consumer

They took more overseas holidays in the year just gone

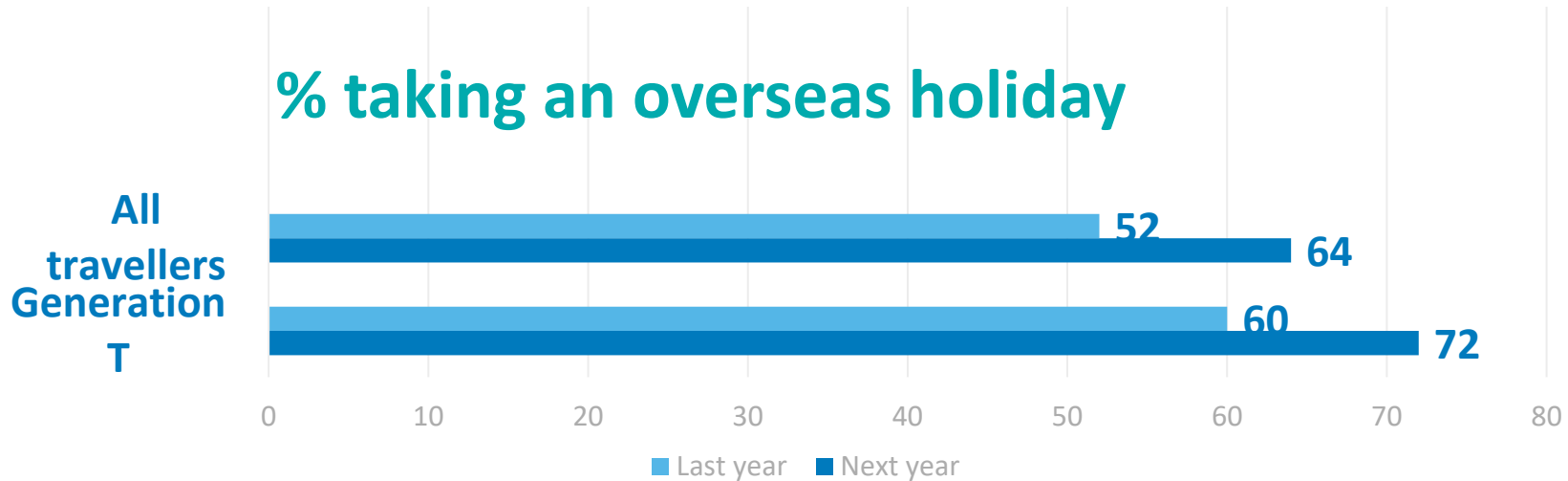
- compared with consumers as a whole
- compared with the amount 18–24-year-olds took the previous year

And more 18–24-year-olds than any other group plan to travel abroad next year.





Overall, 64% say they will take an overseas holiday next year, that increases to 72% of Generation T.



Where Generation T went last year

Generation T	All consumers
1. Spain	1. Spain
2. France	2. France
3. Italy	3. Italy
4. Turkey	4. USA
5. Australia	5. Greece
6. Germany	6. Germany
7. Greece	7. Portugal
8. USA	8. Turkey
9. Mexico	9. Netherlands
10. Netherlands	10. Cyprus

Here are the top ten countries people say they visited in the past 12 months.

There is a lot of commonality between Generation T and the average consumer, with the top three identical.

While eight of the ten countries overall are the same, there are some differences as highlighted in yellow.

Where Generation T aspires to go next year

Generation T	All consumers
1. Italy	1. Spain
2. France	2. Italy
3. USA	3. France
4. Spain	4. USA
5. Germany	5. Greece
6. Greece	6. Portugal
7. Turkey	7. Germany
8. Portugal	8. Turkey
9. China	9. Ireland
10. Ireland	10. Japan

The country choices are even more similar for travel next year – just China and Japan are different in each top 10.

But there is a difference at the top. Spain is still number one, by quite a margin, for all travellers. But - it's Italy which tops the bill for Gen T.

How long are they holidaying for

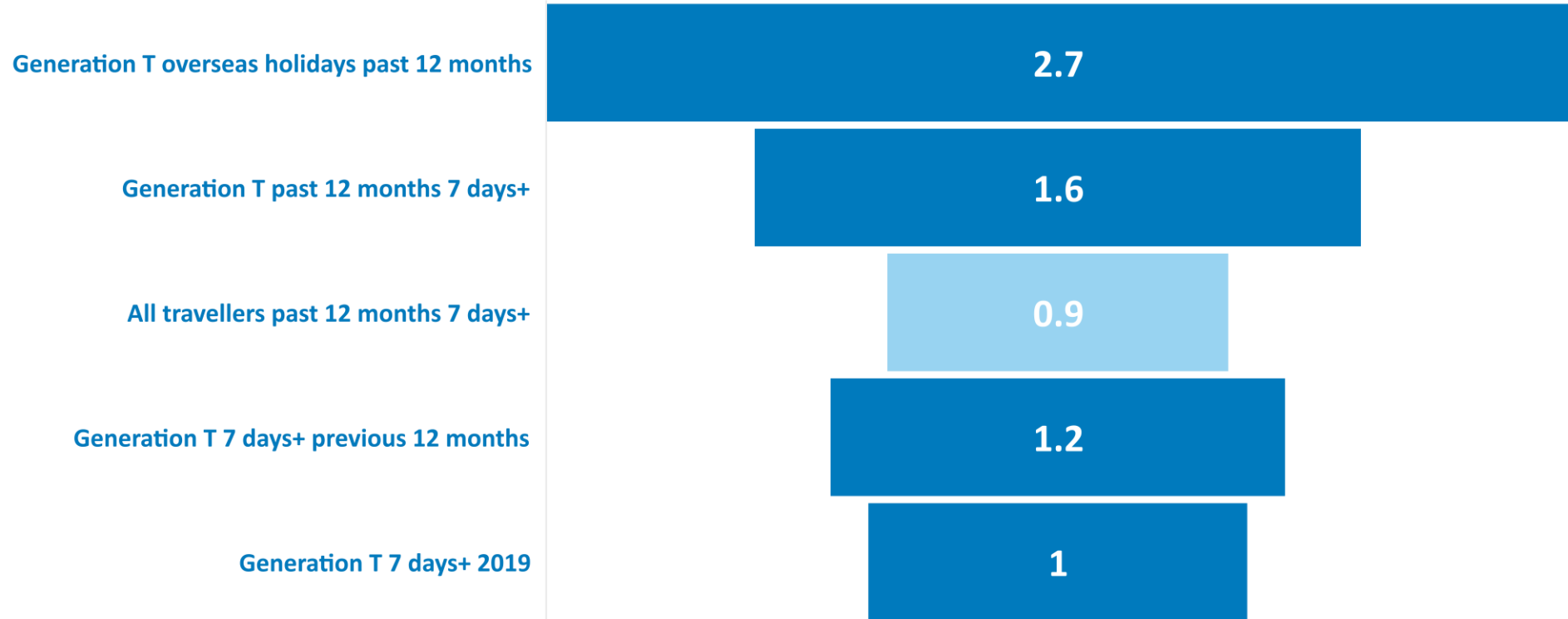
If Generation T is taking more holidays, does that mean they're taking lots of shorter ones?

It seems that's not the case – in fact the opposite is true.

Of the 2.7 overseas holidays Generation T took in the last 12 months, 1.6 were for 7 days or more – compared with 0.9 for all consumers.

And for Generation T, that's more holidays of 7 days or more than in the previous 12 months (1.2), and before the pandemic (1).

Overseas holidays - duration



So, what types of holiday are they taking?

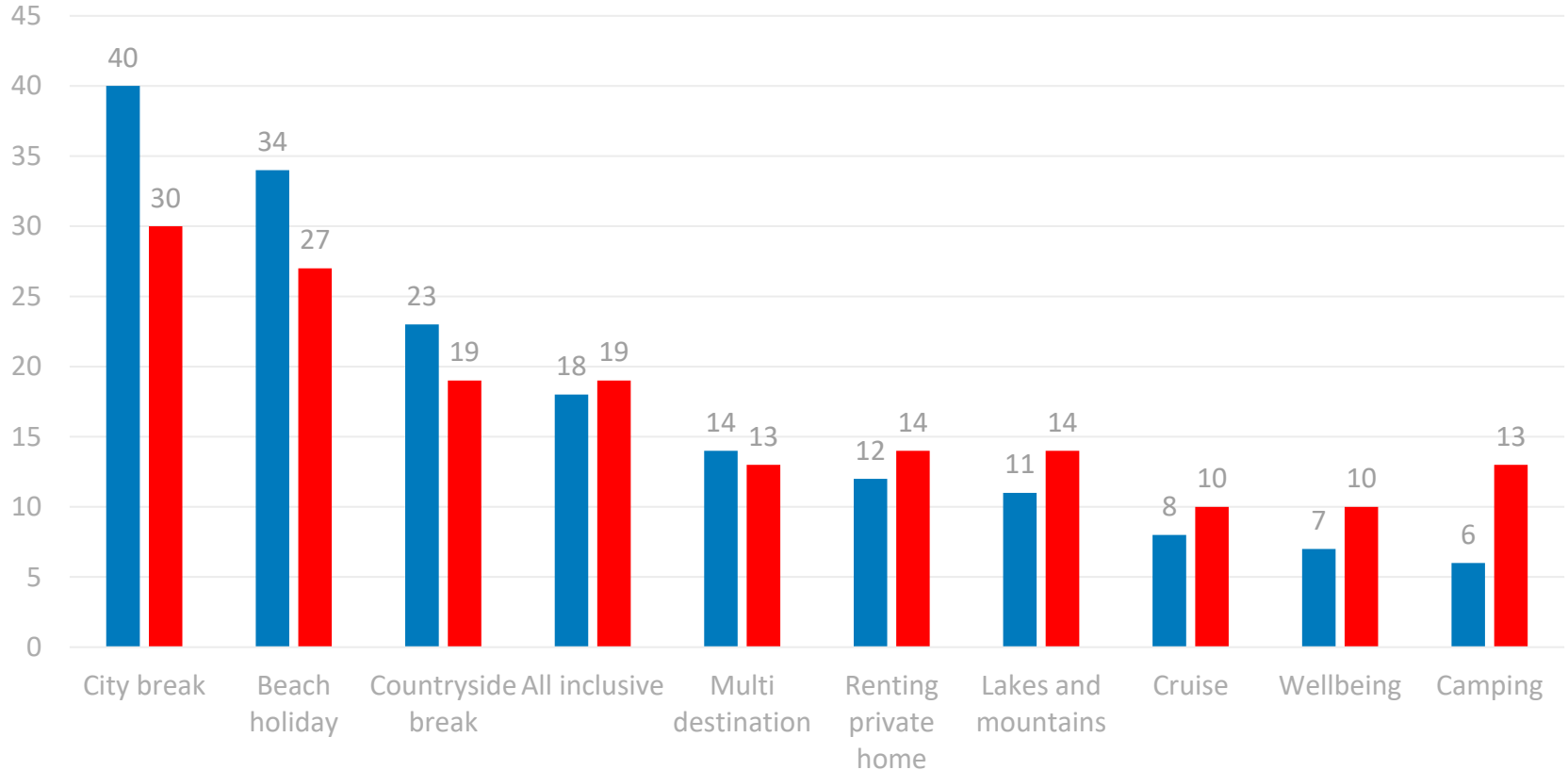
Looking at the top 20 preferred holiday types next year shows Gen T have a different approach to the rest of consumers – they're pretty much open to any type of holiday.

The city break, is their top choice of trip for next year. Then compared to the average consumer they're:

- three times as likely to go on an adventure holiday
- twice as likely to go camping, head to a major sports event, take a train holiday or go on a food and drink-based break.

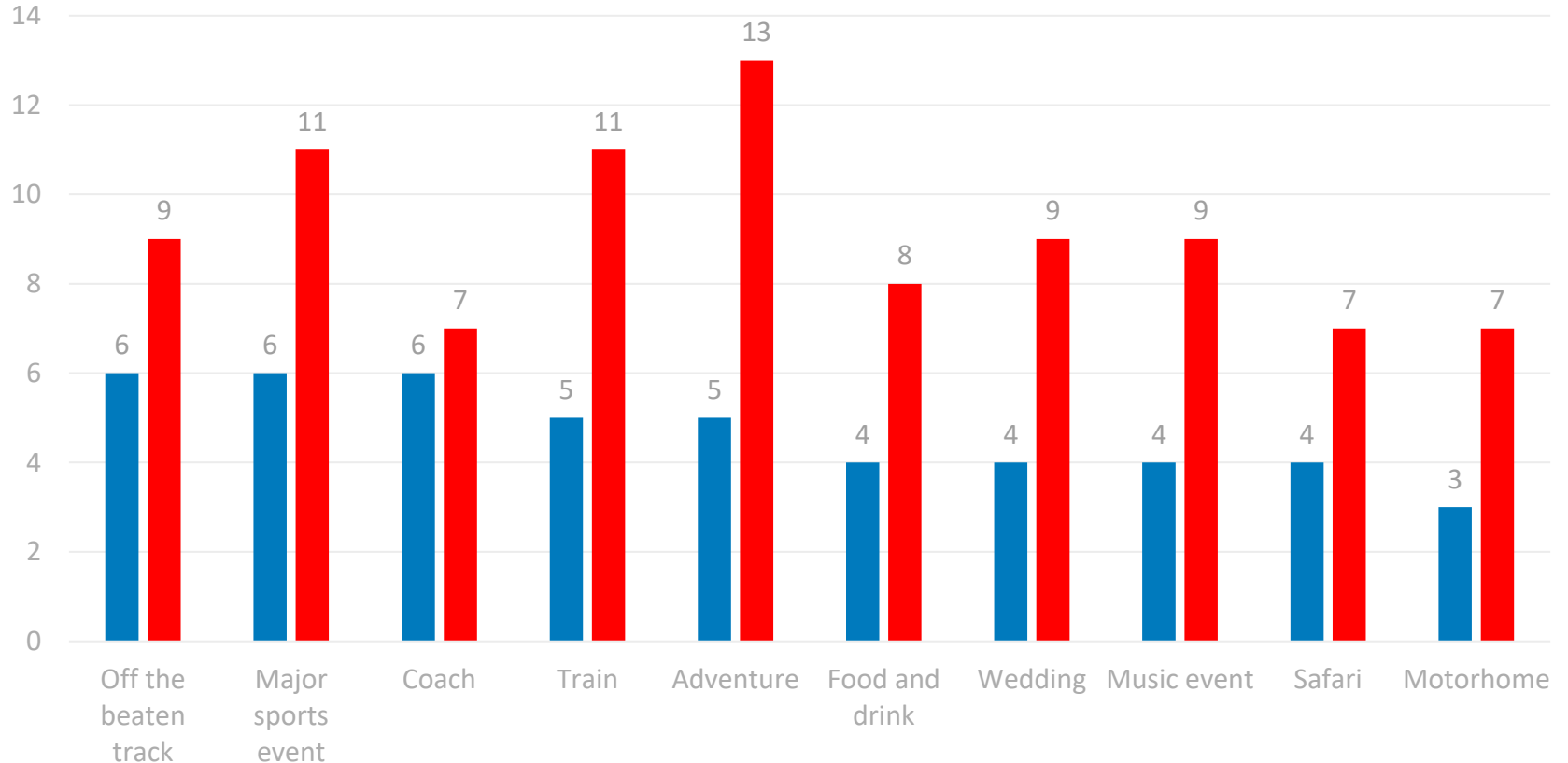
Holiday type

Chart 6



Holiday type - continued

Chart 7



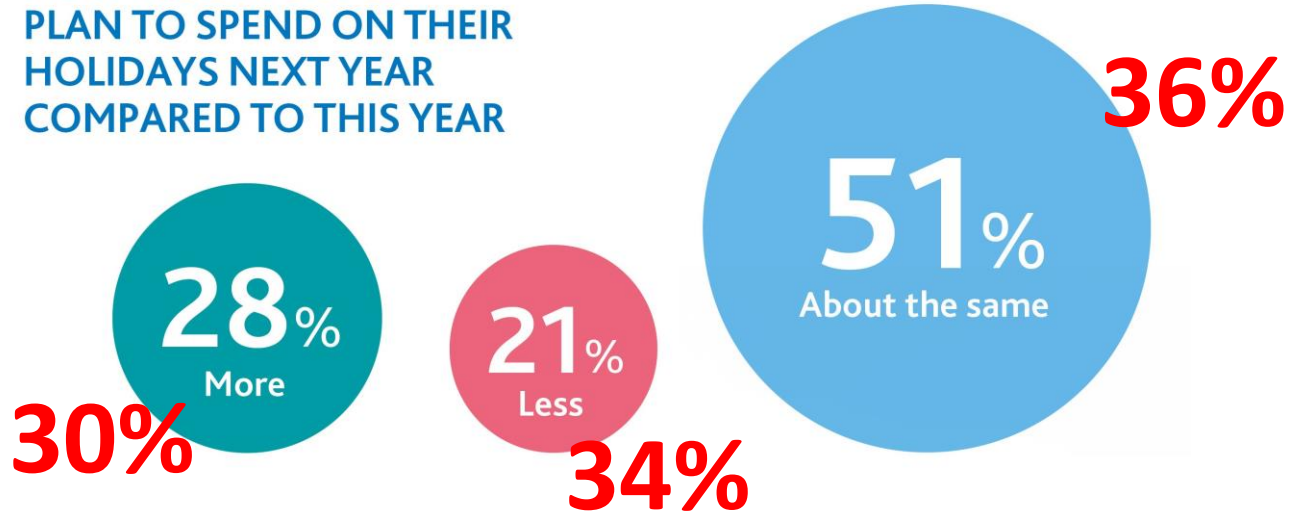
Their spending plans

93% of 18-24-year-olds said the cost of living will have an impact on their travel plans in the next 12 months. Despite this squeeze on their finances, only 4% say they won't go away at all due to the rising cost of living, down from 10% of the wider population.

Instead, they're getting creative to keep costs down, with a third (32%) planning to book cheaper accommodation, 27% taking fewer holidays, a quarter eating out less on holiday (25%) and 24% choosing cheaper transport options.

Spending next year – with a **Generation T** overlay

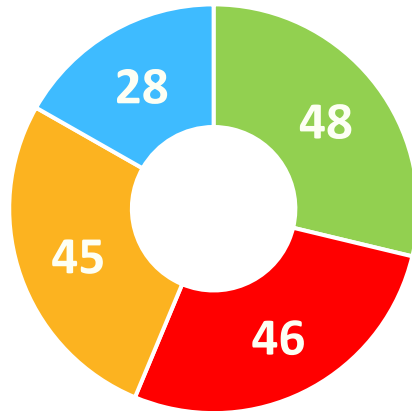
HOW MUCH PEOPLE
PLAN TO SPEND ON THEIR
HOLIDAYS NEXT YEAR
COMPARED TO THIS YEAR



SHOULDER SHOPPERS

Year-round travel - overseas

All consumers

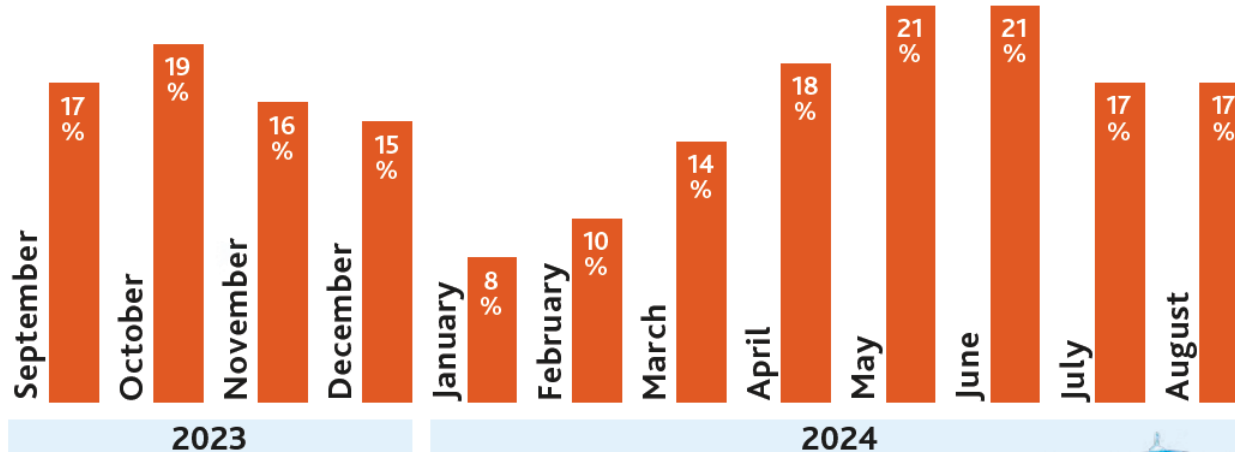


■ Spring ■ Summer ■ Autumn ■ Winter

People are telling us that they plan to travel overseas pretty much throughout the year.

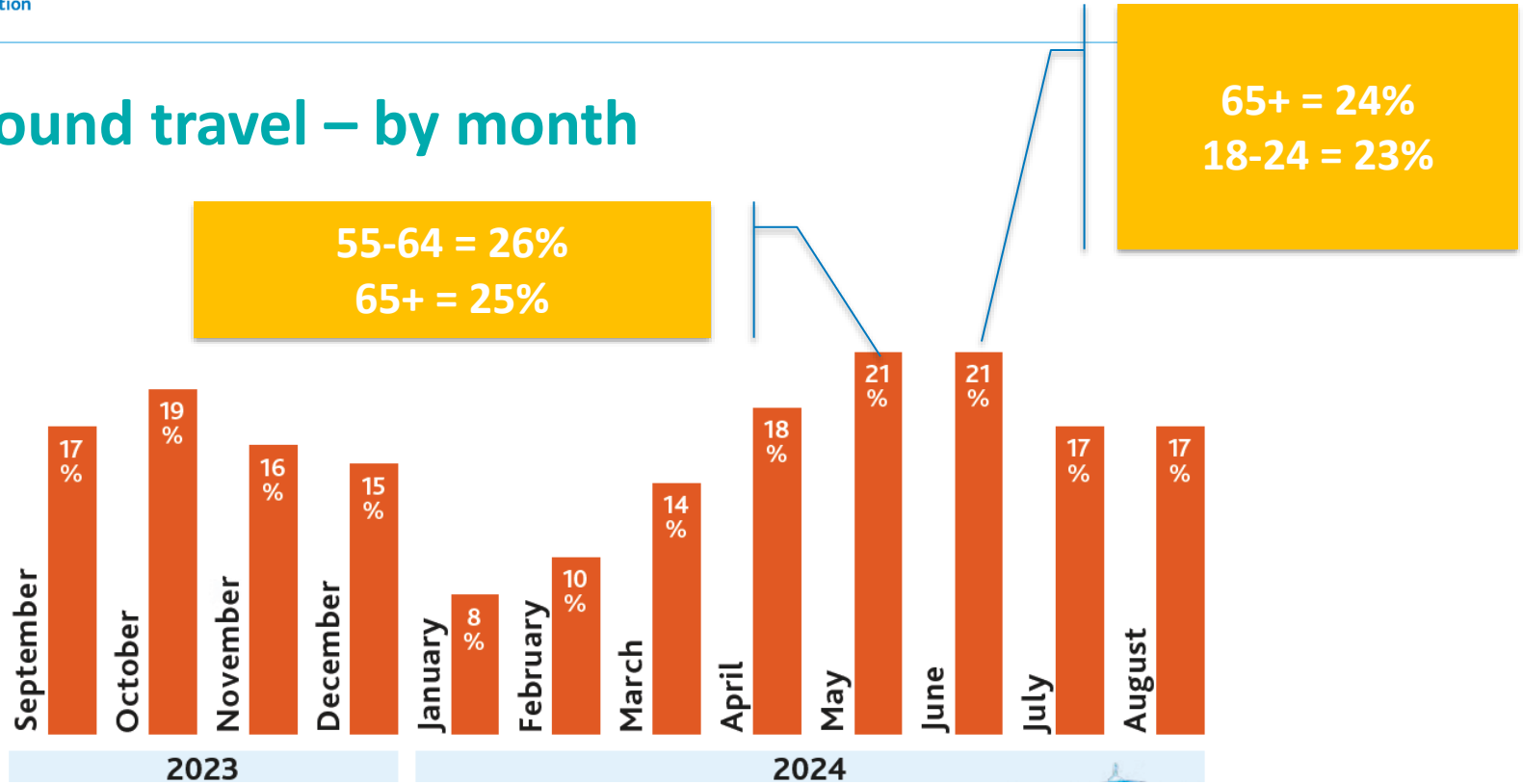
Autumn is nearly as popular as summer, which itself is slightly behind spring. This is continuing a trend we saw beginning before the pandemic – and, indeed, many organisations are deliberately trying to extend their seasons, with an offer and pricing which encourages this.

Year-round travel – by month



When looking at travel by month, May and June are the most popular, with October following after. That's particularly the case for those in the extreme end of the age groups, shown in the chart on the next slide.

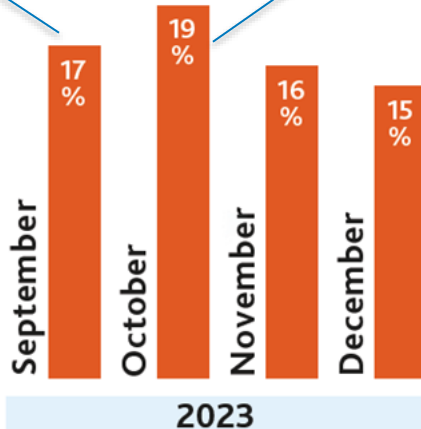
Year-round travel – by month



Year-round travel – by month

55-64 = 24%
Older families = 12%

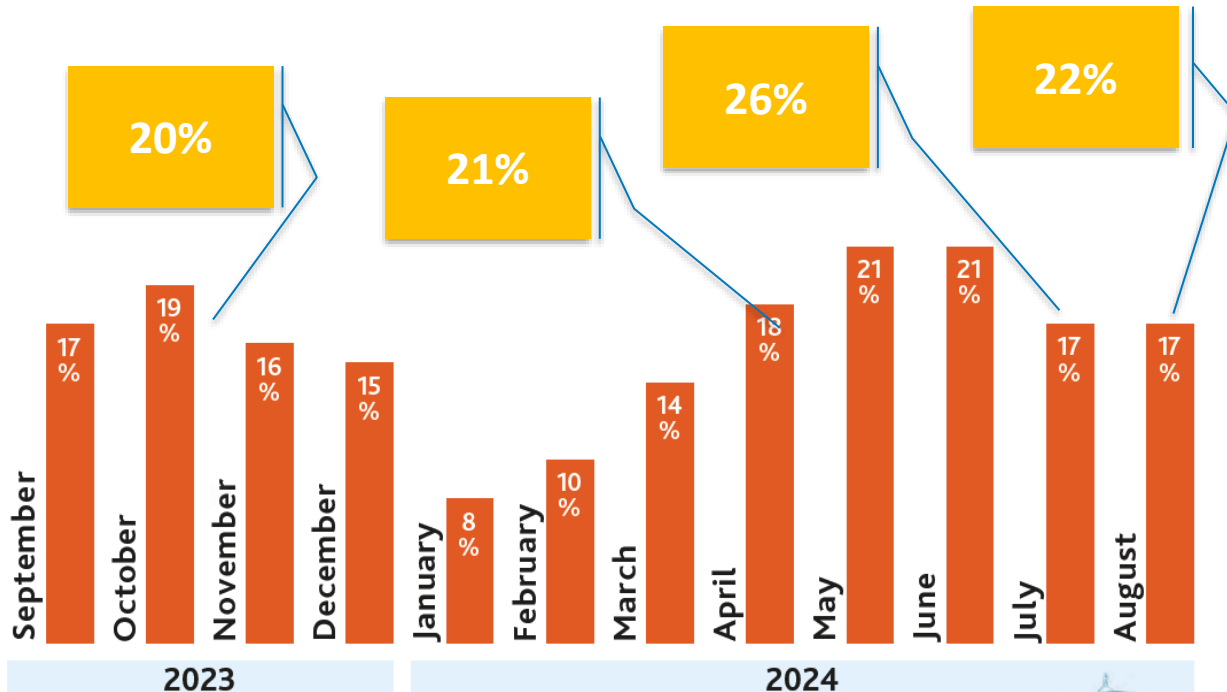
65+ = 23%
Older families = 20%



Like May and June, September and October are also popular with older travellers.

For older families (those with children over the age of 5), there's a big difference in the data for September and October, with the half-term break clearly an important time for them to travel.

Year-round travel – older families



Some have wondered if all-year-round travel is happening because families are more willing to take children out of school during term time. However, older families are actually clustering around school holiday times in general – not just summer, with October (half term) and April (Easter) now nearly as popular as August.

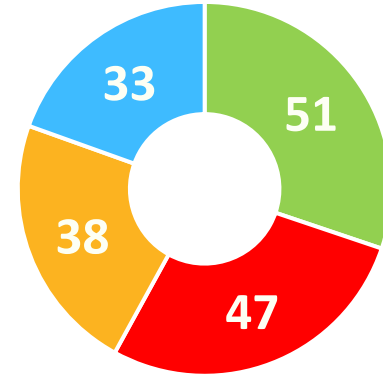
Year-round travel – all families

For young families, spring is ahead of summer, but summer markedly ahead of autumn. And with older families, with children of school age, summer still reigns supreme.

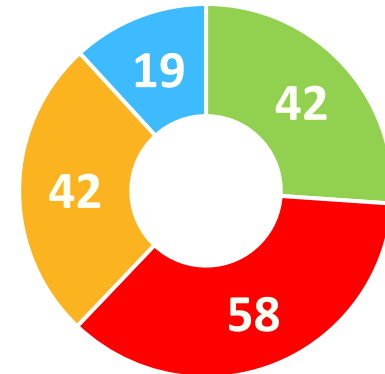
This may not seem surprising, but the point here is to emphasise that the move to all-year-round travel is not uniform across different groups.

See page 17 to compare to all consumers.

**Young families
(child under 5)**



**Older families
(all children
over 5)**



Shoulder shoppers in summary

- They are more likely to be younger or older.
- If people are taking more holidays, it follows that more are likely to take holidays in 'non-traditional' times.
- In a market where people are seeking value – travelling out of peak season is a good way to achieve that.
- We've not seen evidence that suggests the shift is just to recent heatwaves, in fact it's been a continuing trend since the pandemic and reflects the international travel industry's drive to get people to travel all-year-round - not just at peak times.

THE SLOW RETURN OF THE HOLIDAY NEOPHILES

The return of the holiday neophile ...

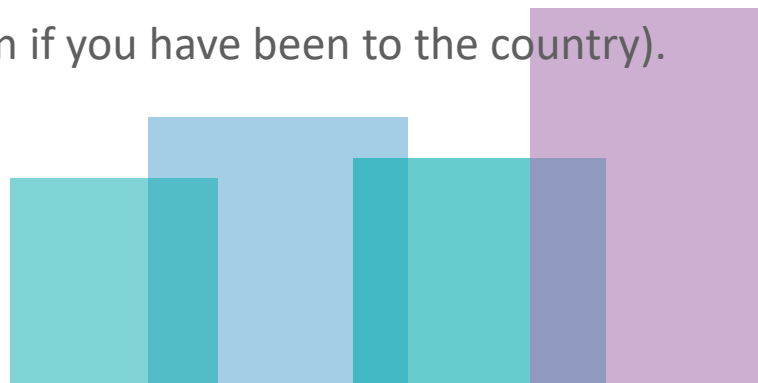
... someone who loves something new or novel.

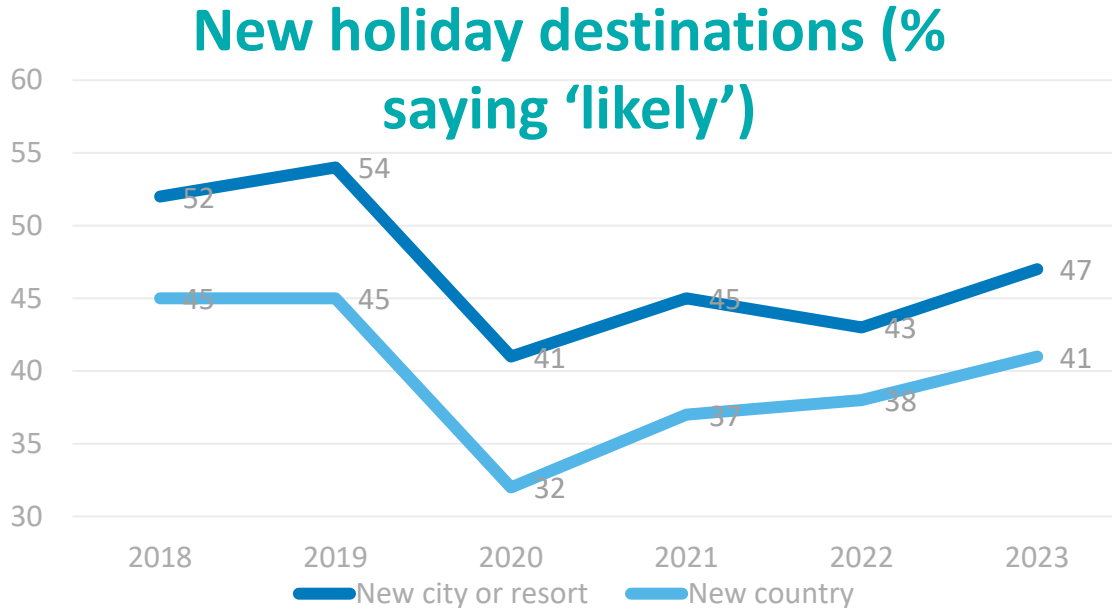
Chart 15 shows the responses to the question: How likely are you to visit any of the following on holiday in the next 12 months?

- A country I have never been to before
- A resort or city I have never been to before (even if you have been to the country).

And finds there is a considerable bounce back from the lows of 2020 in people saying they will try a new place for a holiday.

BUT...





... we are not quite there yet.

The numbers of people saying they want to try something new and will find appeal in a 'new destination' message are still a little lower than 2018.

However, there is an upwards trend and we can see it being likely to continue next year too.

SUSTAINABILITY SELECTORS

We asked if, over the last 12 months...

Did you make any of the following choices about your holiday(s) because of the environmental implications?

I chose a destination
closer to the UK

.....

I took transport other
than flying

.....

I chose accommodation with
a better sustainability record

I paid more for a holiday with
a better environmental and
social record

.....

I chose one company over
another because it had a better
environmental and social record

.....

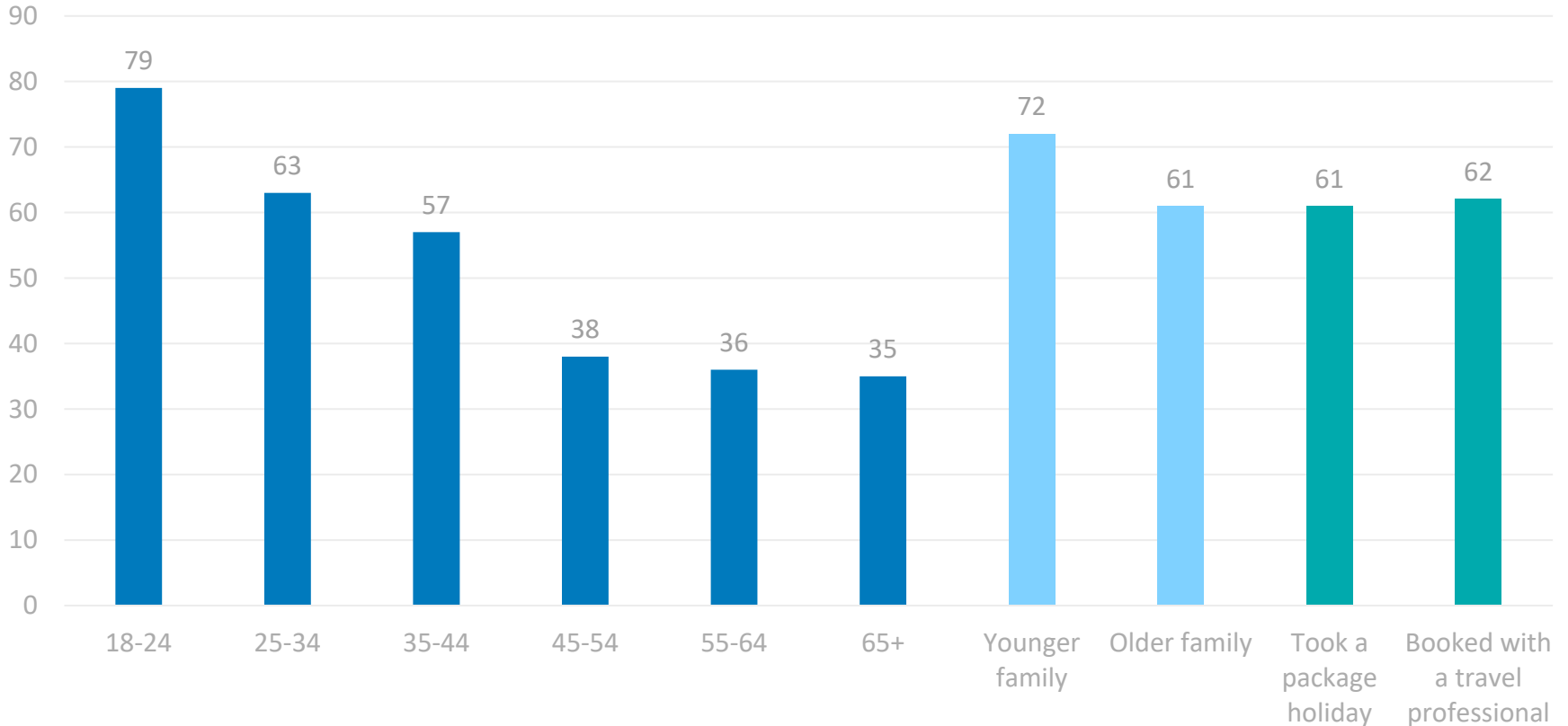
None of the above

The average (among all consumers) who took at least one action relating to sustainability was 50%. This is the first year we have asked this question but we suspect it is on the rise.

As you can see from chart 16 on the next slide, the dark blue bars show there is a real difference with age. The light blue shows the important family market is also strong in saying it's acting on sustainability. The green bars show it's also stronger among those who aren't booking their holidays independently.

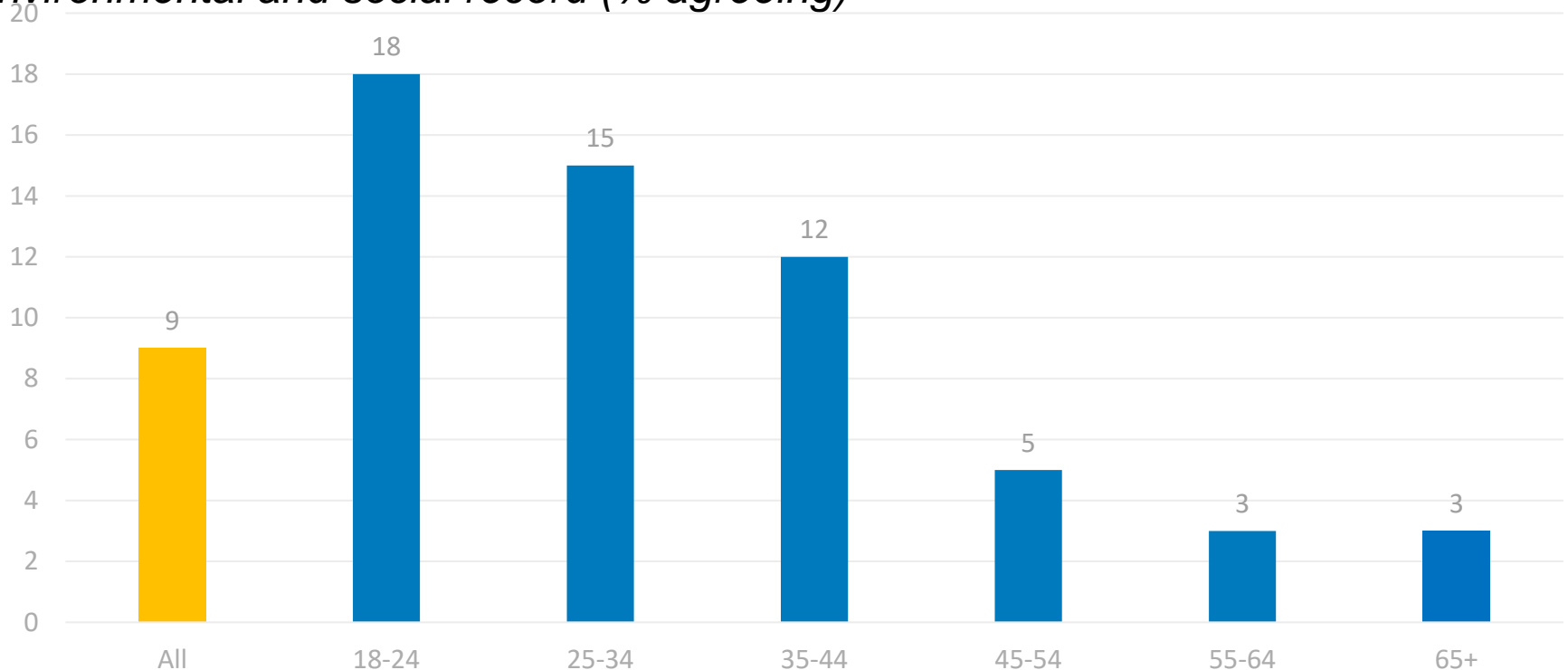
Chart 17 on the following slide shows that age appears to correlate with likelihood to act on environmental factors. All our questions showed a similar sort of pattern – typically, the younger the age group, the more likely to have already taken an action.

% saying they took at least one action



The age divide: an example

Last year, I paid more for a holiday with a company because it had a better environmental and social record (% agreeing)



The Say Do Gap – all consumers

There is a gap, though, between what people say they intend to do and what they actually do, as shown by this chart. Intention to act is much higher.

But positive action has started – remember that 50% have taken at least one action on the right.

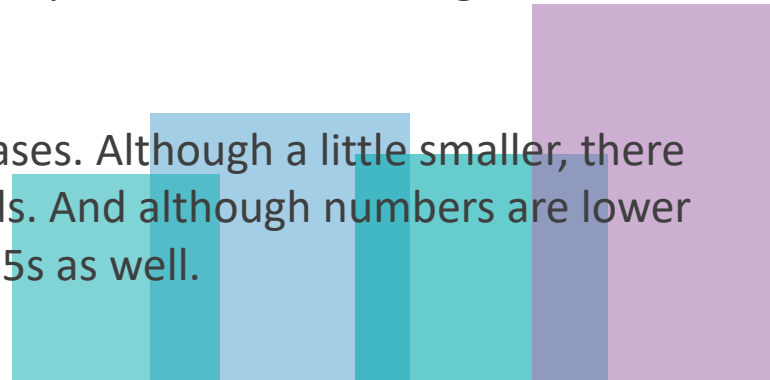
Say ⁷	Do ⁸
Concern about climate change may make me more likely to choose a destination closer to the UK	I chose a destination closer to the UK
43%	17%
I am conscious about the impact of air travel on the environment when making choices about my holiday	I took transport other than flying
47%	12%
I would choose one hotel over another if it had a better track record on sustainability	I chose accommodation with a better sustainability record
44%	10%
I am prepared to pay more for a holiday with a company based on a better environmental and social record	I paid more for a holiday with a better environmental and social record
37%	9%
I am likely to choose one company over another based on a better environmental/ sustainable record	I chose one company over another because it had a better environmental and social record
41%	8%

Propensity to act by age

Chart 18 on the previous slide reflects all consumers – so does this principle change when you look at different demographics?

Looking at age in chart 19 (red is 18-24, blue is 65+) you can see that 18-24-year-olds are taking more action, by a considerable margin, compared with the average consumer.

But their stated intentions are also higher in most cases. Although a little smaller, there is still a big ‘say do’ gap among those 18-24-year-olds. And although numbers are lower on both sides, there still a chunky gap for the over 65s as well.

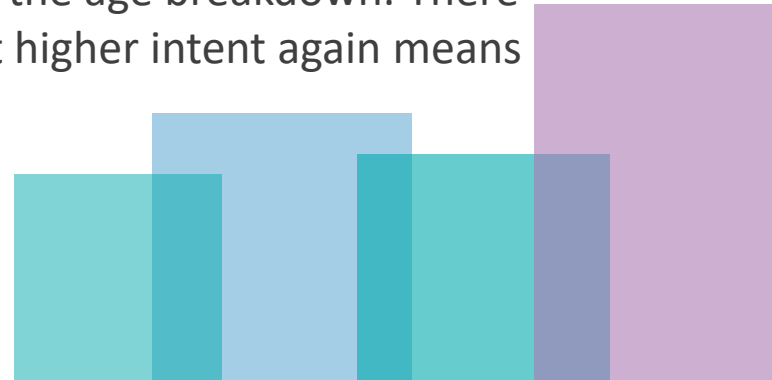


18-24		65+		Say ⁷	Do ⁸	18-24		65+	
56	31	43%	17%			25	13		
Concern about climate change may make me more likely to choose a destination closer to the UK		I chose a destination closer to the UK							
46	45	47%	12%	20	11				
I am conscious about the impact of air travel on the environment when making choices about my holiday		I took transport other than flying							
53	34	44%	10%	20	3				
I would choose one hotel over another if it had a better track record on sustainability		I chose accommodation with a better sustainability record							
44	31	37%	9%	18	3				
I am prepared to pay more for a holiday with a company based on a better environmental and social record		I paid more for a holiday with a better environmental and social record							
47	30	41%	8%	20	3				
I am likely to choose one company over another based on a better environmental/ sustainable record		I chose one company over another because it had a better environmental and social record							

Families

Chart 20 on the next slide looks at the approach taken by families, with red showing the percentages for young families (child under 5) and blue for older families (children over the age of 5 / school age).

You can see there is a similar sort of pattern as with the age breakdown. There is higher action than the average in both groups but higher intent again means there is still a big gap.



The Say Do Gap – family market

Y= young families, O = older families

Y	O	Say ⁷	Do ⁸	Y	O
55	51	Concern about climate change may make me more likely to choose a destination closer to the UK 43%	I chose a destination closer to the UK 17%	17	21
49	53	I am conscious about the impact of air travel on the environment when making choices about my holiday 47%	I took transport other than flying 12%	18	15
52	53	I would choose one hotel over another if it had a better track record on sustainability 44%	I chose accommodation with a better sustainability record 10%	17	16
44	48	I am prepared to pay more for a holiday with a company based on a better environmental and social record 37%	I paid more for a holiday with a better environmental and social record 9%	20	15
52	48	I am likely to choose one company over another based on a better environmental/ sustainable record 41%	I chose one company over another because it had a better environmental and social record 8%	11	13

The Say Do Gap in summary

- People are now starting to act – though this differs between demographics.
- The Say Do Gap is broadly consistent whichever age group you look at.
- There is a role for industry to talk to customers about sustainability to help bridge the gap between intention and action.

