

TRAVEL TRENDS REPORT 2017



INTRODUCTION



This report draws on market information, news from ABTA Members and ABTA research, as we reflect on a challenging but successful year for the travel industry and look at the prospects for 2017.

What makes the travel industry so exciting is its dynamic nature; new destinations emerge and niche trends become mainstream, as travel companies evolve and innovate to meet the needs and desires of their customers. With that in mind, we've outlined some key trends for the year ahead which are likely to influence holiday habits in the next 12 months.

ABTA's 12 'Destinations to watch' for 2017 are also included in this report. We have identified a mix of destinations that are expected to capture the public's imagination for a variety of reasons. It could be that the destination has suddenly become more easily accessible thanks to new routes, it is hosting a major event, featuring in a Hollywood blockbuster or, it could simply be that its time has come.

Our choices are based on the best insider knowledge and are designed to inspire holidaymakers to try out new experiences and destinations or see old favourites through new eyes.

I hope you find this report useful. If you would like further information, please don't hesitate to contact our PR team at press@abta.co.uk.

Mark Tanzer

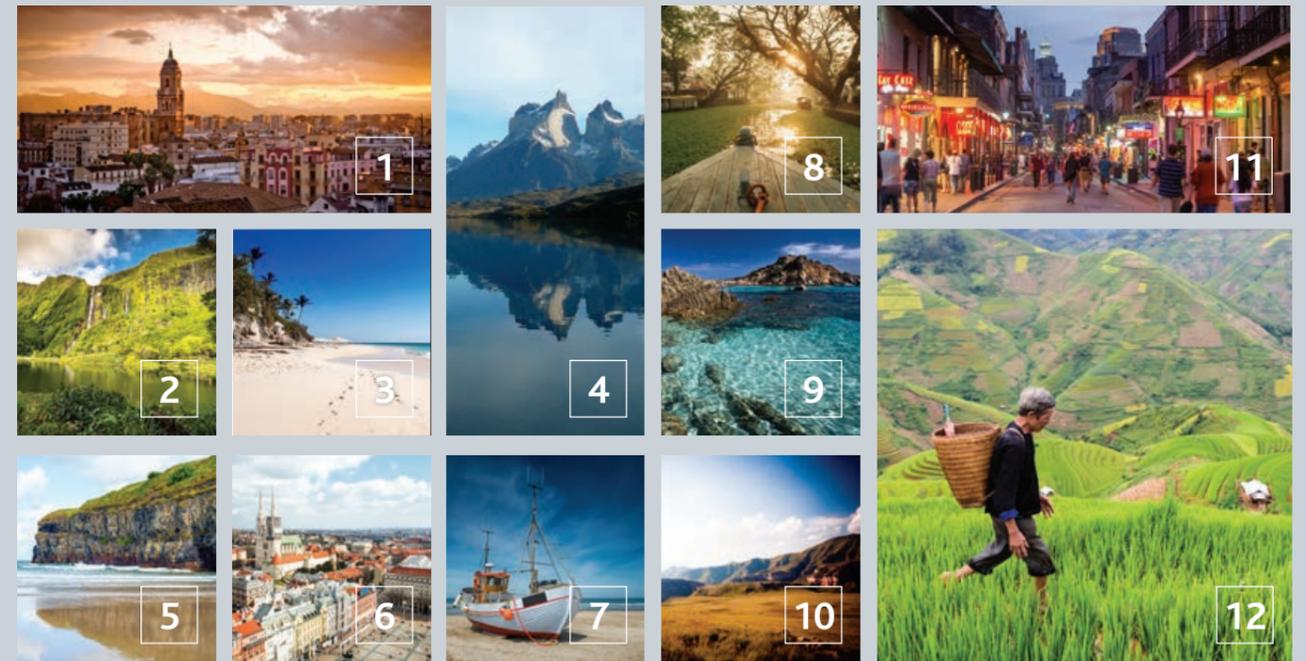
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12 DESTINATIONS TO WATCH



- 1 ANDALUCÍA**
Recent investment has rejuvenated this old favourite and it offers year round treats with one of the best climates in Europe.
- 2 THE AZORES**
More holidaymakers are wising up to the incredible delights of these unspoilt Atlantic islands with their dramatic volcanic landscapes and seas teeming with dolphins, whales and manta rays.
- 3 BERMUDA**
Ben Ainslie, the world's greatest sailor will be leading Great Britain's strongest challenge for years, as the 35th America's Cup takes place in Bermuda in June.
- 4 CHILE**
Chile's incredibly diverse landscapes will be much easier to reach in 2017, thanks to new direct flights from the UK.
- 5 COUNTY KERRY**
Come and feel the force in beautiful County Kerry as the latest Star Wars movie features the stunning County's Skellig islands.
- 6 CROATIA**
A Europe where your pound goes further. Its many islands range from isolated idylls to hosts of dance festival extravaganzas. Zagreb, Split and Zadar are increasingly seen as city break destinations in their own right.
- 7 DENMARK**
User-friendly cities, affluent happy people, world-class cuisine and design – and hygge. Aarhus, will be taking its place in the spotlight as the European City of Culture.
- 8 KERALA**
2017 marks the 70th anniversary of India's independence, and what better way to celebrate than a trip to the beautiful Southern coastal state of Kerala.
- 9 SARDINIA**
The "hot" Mediterranean island of 2017, find out why discerning European holidaymakers come to Sardinia for a break.
- 10 SOUTH AFRICA**
The country that has everything – but won't break the bank. See deserts, jungles, pounding surf and spectacular flora all in one trip.
- 11 USA – THE SOUTHERN STATES**
Head south for a different take on the USA. Music lies at the very heart of the Southern States of America. Jazz, the Blues, Rock and Roll, Country and Bluegrass all have their roots here.
- 12 VIETNAM**
New direct routes from the UK bring this fascinating country closer. A country of contrasts, versatile Vietnam offers beaches, mountains, modern cities and ancient wonders.

2016 MARKET OVERVIEW

2016 has been an eventful and challenging year for the travel industry.

British holidaymakers have continued to holiday during the past 12 months, but following an extraordinary couple of years there have been some changes to the way they holiday, with world events impacting people's choice of holiday type and destination.

The holiday market was up in 2016, with ABTA research showing growth in both the number of Britons taking a holiday and in the average number of holidays taken per person. According to the ONS, in the 12 months to September 2016, the number of visits abroad by UK residents was 7% higher when compared with a year earlier; expenditure on these visits also increased by 10% during this period¹.

In 2016, people opted for more city breaks and fewer traditional beach holidays, according to ABTA research. Key destinations were North America and Europe which saw increases in British visitors of 4% and 9% respectively². The combined turnover of ABTA's Membership increased to £33.07 billion for the 2015/16 financial year which ended on 30 June 2016.

Capacity was the story of 2016, and destination winners and losers emerged as people chose more familiar destinations or places they perceived to be safer. With Tunisia effectively closed to British tourists, Egypt

visitor numbers falling due to restrictions on flights to Sharm el Sheikh airport, and a fall in business to Turkey following several high-profile incidents, some resorts in the western Med were stretched to capacity and this was particularly marked during the summer. Overall, the summer holiday market was up by 5%³ year-on-year, however some countries saw significantly higher numbers, with Portugal seeing an increase of 23%, Spain 20% and Cyprus 17%. Holidaymakers were also prepared to travel further afield, and travel companies responded to this demand with long haul holidays and more comfortable aircraft.

In a year of change and uncertainty, people sought the support, protection and convenience of a package holiday and more than half the population (53%) opted for one, according to ABTA research. These numbers are up by more than 10% from 2011, and are being driven by the oldest and youngest age groups as well as the more affluent households.



Many countries were impacted by challenging and high profile events, including terrorist attacks in Brussels, Munich, Nice and Istanbul, an attempted military coup in Turkey and the Zika virus in parts of the Americas, Asia and the Caribbean. Large earthquakes devastated parts of Italy and New Zealand, and Hurricane Matthew tore through the Caribbean. It was impossible to ignore the impact of political events, with the UK voting to leave the European Union being perhaps the most significant.

Whilst Brexit dominated the headlines, it did not have much immediate impact on holiday taking during 2016. However, the subsequent fall in the value of the pound instantly hit holidaymakers and their spending power overseas. Consumer confidence levels have held up well in the months since the referendum result, but the full ramifications of Brexit will not be known for many years.

¹ONS, Statistical bulletin – Overseas travel and tourism: Sept 2016

²ONS, Statistical bulletin – Overseas travel and tourism: Sept 2016

³GfK – Travel Leisure Monitor October 2016

“ Whilst Brexit dominated the headlines, it did not have much immediate impact on holiday taking during 2016 ”

“ In 2016, people opted for more city breaks and fewer traditional beach holidays ”



2017 MARKET OUTLOOK: OVERSEAS HOLIDAYS

A positive outlook is tempered by caution and uncertainty, in particular around Brexit negotiations.

Whilst there are encouraging signs in the market pointing to a positive outlook for the travel industry in 2017, many uncertainties remain, including around the Government's Brexit negotiations. Destination and capacity challenges are expected to continue.

Positive sentiment seen in the market last year has continued, despite uncertainty created by world events and political upheaval in the UK. Almost a quarter of the population (24%) plan to spend more on holidays next year with just 16% stating they will spend less, according to ABTA research. These numbers are broadly in line with 2015 when 23% planned to spend more and 15% planned to spend less.

As 2016 draws to a close, early bookings for overseas holidays also appear strong for 2017, with industry figures showing bookings for summer 2017 tracking 11% above last year⁴. However, this may be a reflection of the growing trend for early booking and may also be consumer reaction to the capacity issues of 2016, with people keen to secure their preferred resort or destination.

The shift in capacity to the western Mediterranean and towards long haul destinations means that new destinations are emerging for 2017. Over a quarter of

all holidaymakers (26%) say they are very likely to visit a country they've never been to before, compared to 18% who said this last year. One in three (29%) say they will go on holiday to a new resort or city (even if they've visited the country before), up from 23% last year. Travel companies are expected to continue to respond to this demand in 2017.

Once again, Spain is expected to be the year's top performing destination with Portugal, Italy and Cyprus seeing strong early bookings for 2017. Cape Verde, Croatia and Mexico are also tipped to be popular.

City breaks and beach holidays will remain the top holiday choices in 2017, with 52% of people planning to take a city break and 44% planning a beach holiday. All-inclusive holidays are expected to perform particularly well, which may signal that more people want to manage their budgets and hedge against a volatile GBP. This type of holiday is particularly appealing to young families, 35% of whom expect to take an all-inclusive holiday in 2017.



Fluctuations in currency are likely to continue throughout 2017 as Brexit negotiations get underway. As outlined later in this report, currency issues may well influence holiday decisions. When there is so much volatility and uncertainty in our economy, it is difficult to predict what is going to happen to bookings next year, but Brexit negotiations will certainly impact the travel industry and the UK economy more widely. ABTA will continue to work proactively with the Government to raise awareness of the priorities for travel businesses and UK travellers.

Following the Government's decision that Heathrow should be allowed to build a third runway, it is hoped that there will be good news for the UK's airport capacity and that real progress will be made in delivering the new runway.

⁴GfK's Travel Leisure Monitor November 2016

“ Once again, Spain is expected to be the year's top performing destination ”



2017 MARKET OUTLOOK: DOMESTIC HOLIDAYS

With uncertainty around Brexit and currency fluctuations expected to continue throughout 2017, it seems likely that domestic tourism may see a boost next year.

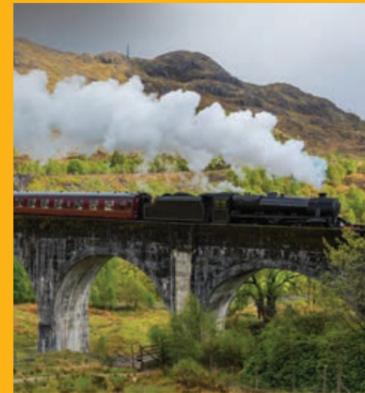
Domestic holidays drove the overall increase in the average number of holidays taken per person in 2016 and in the number of people taking a holiday. The number of domestic holidays increased to 71% in 2016, up from 64% in 2015, signalling a return to the numbers seen during the Olympic Summer of 2012. VisitBritain announced a record-breaking January to April 2016 with 11 million trips taken in England.

2017 will celebrate some of Britain's greatest writers and their books and has been declared by VisitEngland as the 'Year of Literary Heroes'. It is 125 years since the first Sherlock Holmes story was published, 200 years since the death of Jane Austen, and 20 years since Harry Potter made his first appearance in the Philosopher's Stone. Events in the planning to celebrate these anniversaries include special Jane Austen exhibitions, tours and 'Big Picnics' taking place across Hampshire with special performances and Regency food; special live screenings of the Harry Potter films accompanied by a full orchestra; and a major exhibition dedicated to the magic of Harry Potter which will include previously unseen material from author JK Rowling. Austen fans may head to Chawton, in Hampshire where Jane Austen wrote novels including *Sense and Sensibility* and *Mansfield Park* or to Bath which will be celebrating its most famous resident.

In 2017, Hull will be the UK City of Culture and is likely to see increased visitor numbers, with an exciting programme of theatre, music and art taking place across the year. The city has secured £32 million in funding for the celebrations⁵ which will be invested into events, community engagement and the programme's legacy.

The Edinburgh Festival is celebrating its 70th year and there will be enhanced celebrations at this already popular month of festivals. Expect special anniversary events at all of the main festivals which began in 1947 as a way to bring people of the world together through the arts.

London theatre breaks are expected to remain popular in 2017 with David Tennant returning to the West End in Patrick Marber's *Don Juan* in Soho, Pulitzer Prize-winning play *Hamilton*



opening in October 2017 and *School of Rock – The Musical* extended until April.

According to VisitEngland, domestic beach and countryside holidays are growing in popularity with a variety of accommodation options such as 'glamping' making this type of trip increasingly appealing. Families remain key to the domestic market.

Young families were once again the most likely group to take domestic holidays in 2016, with research from ABTA finding an average of 3.3 domestic holidays per person for this group, compared to a national average of 2.0.

⁵www.visitbritain.org/more-five-million-brits-holidaying-home-august-bank-holiday-weekend

⁶www.hull2017.co.uk/discover/article/fundraising-support-massive-vote-confidence-hull

“ The Edinburgh Festival is celebrating its 70th year ”

“ Young families were once again the most likely group to take domestic holidays ”

2017 MARKET OUTLOOK: CRUISE

New additions to fleets and exciting destinations look set to make 2017 another good year for cruise.

Over one in ten holidaymakers (13%) are planning a cruise in the next 12 months. The chance to see multiple destinations, the quality of the food and drink on board and the quality of accommodation are the main factors drawing people to cruise.



The Mediterranean was the most popular choice for Brits in 2016⁷, whilst the Canary Islands, the Norwegian Fjords and the Caribbean continued to see increases in passenger numbers. People are also becoming more adventurous, with the Arctic proving to be one of the fastest-selling destinations for cruise in 2016 and its popularity set to continue into 2017.

Several investment projects are due to go live in 2017, in particular in the Middle East. This area is predicting record numbers of passengers over the coming years, and investment into projects such as the Abu Dhabi Cruise Terminal is providing capacity and access to this increasingly popular cruise destination.

ABTA Members have also reported an increase in the numbers of group bookings for cruise. Event-led cruises are proving popular – for example, several companies are offering cruises to the America's Cup in Bermuda.

Activity and experience-led cruises are also expected to be popular in 2017, while festival style cruises with on-board music and DJs are attracting younger holidaymakers.

Cruises on which the on-board currency is the pound may be a popular choice in 2017, as holidaymakers seek certainty over their budgets following our vote to leave the EU; Fred Olsen has reported that this is a popular factor with their customers. All-inclusive cruises may see similar interest.

After a strong 2016, the river cruise market continues to grow. Traditional routes such as the Danube remain popular and Asia is now a favourite destination, while in Africa the Zambezi river is attracting cruisers. The recent ITV drama, *Tutankhamun*, has helped to boost enquiries for Nile cruises.

⁷www.cruisecritic.co.uk/news/news.cfm?ID=6884

“ After a strong 2016, the river cruise market continues to grow ”



1 THE CURRENCY CONSCIOUS HOLIDAY

Recent fluctuations in the value of the pound are expected to continue into 2017, and it is likely that this will influence holiday decisions. According to Virgin Holidays, value for money is a key choice-driver for over half of their customers, with changes to the strength of the pound impacting their choice of holiday destination. Destinations where the pound may go further include Argentina, Mexico and South Africa.

Some holidaymakers are also seeking to protect themselves against currency fluctuations by going all-inclusive; 18% of people took an all-inclusive holiday in the last 12 months, whilst a quarter (25%) are planning to take one in 2017.



2 LONG HAUL CITY BREAKS

With the city break firmly established as people's favourite holiday type – over half of Brits (53%) took one in 2016 compared to 38% who took a beach holiday – city breakers are looking further afield for their next holiday and the city break is going long haul.

Wider availability of new aircraft, such as Boeing's Dreamliner and the Airbus A380, is making longer journeys more attractive and comfortable. Additionally, the abolition of Air Passenger Duty (APD) bands C and D in April 2015 has meant a welcome saving for people flying long haul.

Destinations include Tokyo, Cape Town, Dubai, Hong Kong and Bangkok. U.S. cities including L.A., Miami, Boston and Washington are also popular. Thomson Holidays launched city breaks to New York, Las Vegas and Singapore at the end of 2016 so the trend looks set to continue.



3 MICROADVENTURES

An increasing drive for healthier lifestyles is spilling over into the way we holiday according to Euromonitor's Global Trends Report 2016, and the microadventure is a key component of this trend.

Defined by British adventurer and author Alastair Humphreys as 'small and achievable, for normal people with real lives', busy holidaymakers are opting to spend some of their holiday or a short break experiencing destinations in a more active way by taking part in a microadventure.

From white water adventures in London's Lea Valley to kayaking in the Loire valley, horse-riding in Andalucía to climbing Mount Vesuvius or enjoying one of Budapest's spas, microadventures can be affordable and easily achievable. Almost one in ten (9%) people took an activity holiday in 2016 according to ABTA research, and the microadventure looks set to boost this further in 2017.

4 TRAVEL TECHNOLOGY HITS THE HIGH STREET

Holidaymakers may well find themselves enjoying their hotel, resort or destination before they travel as travel companies use technology such as virtual reality to let people 'try before they fly'.

Some travel companies, including Thomas Cook, Thomson Holidays, Kuoni and Virgin Holidays, have opened concept stores on the high street where technology and digital take centre stage to help their customers experience their destination, as well as to build bespoke itineraries and trips. Thomson has created a new web-based tool to offer suggestions to customers of things to see and do, using left and right swipe functionality to seamlessly build an itinerary for a city break. Thomas Cook has been using virtual reality to allow customers to experience their new aircraft.

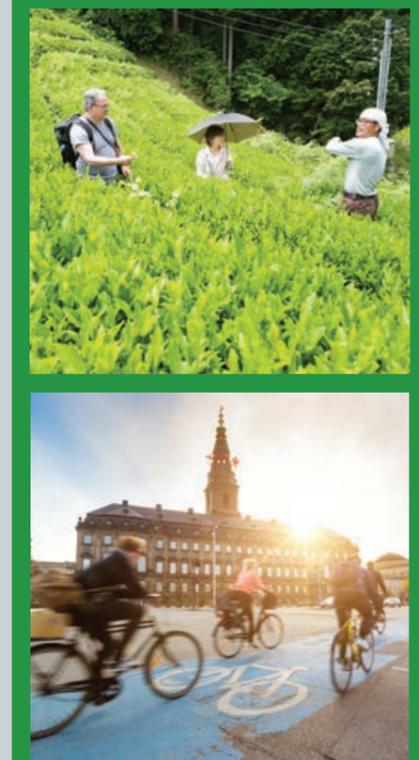


5 SUSTAINABLE TOURISM TAKES CENTRE STAGE

2017 is the UN Year of Sustainable Tourism for Development and this is expected to put sustainable tourism right at the heart of the agenda. According to the UN, 'well-designed and well-managed tourism' can contribute to sustainable development, to job creation, to trade and to fostering better understanding amongst different cultures. It is expected that travel companies will be inspired by this year to look at their role in the destinations they sell to.

G Adventures has introduced a number of new social enterprise projects into its trips for 2017 to give back to local communities and keep tourism dollars in destination.

ABTA's own Travelife subsidiary, which audits and accredits hotels for their sustainability credentials, will continue to expand its base, and promote the business and social benefits of sustainable tourism.



ANDALUCÍA | SPAIN

An old favourite revitalised and modernised

British holidaymakers have been heading off to Andalucía in Southern Spain since the 60s but recent investment has rejuvenated this old favourite and it offers year round treats with one of the best climates in Europe.

People will find it easier than ever to visit Andalucía in 2017, with new regional flights to Malaga offered by Thomas Cook, Jet 2 and Ryanair. The region has some of the most fascinating cities in Spain which revel in their Moorish heritages. The Mesquita in Cordoba, Alcazar in Seville and Alhambra in Grenada all offer a tantalising glimpse of an exotic world of stunningly beautiful palaces and mosques. Malaga is the main gateway airport into Andalucía, and holidaymakers would be well advised to spend some time in the town which has its own Moorish palace and a port area, and has had a recent makeover. Andalucía also has some of the best beaches and hotels in Spain, with high temperatures lasting well into October. Andalusian cuisine is delicious,

with rabo del toro – oxtail stew – being the signature dish of the South. The area's cuisine will be showcased in 2017, with the city of Huelva being recognised as the Gastronomic Capital of Spain 2017 and a true paradise for foodies!



'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ In some parts of Spain it's against the law to be in the street wearing only a bikini or swimming shorts/trunks. Being bare-chested has also been banned. Some local councils will impose fines if you're caught wearing swimwear on the seafront promenade or the adjacent streets.
- ✓ There have been several deaths as a result of falls from balconies. Don't take any unnecessary risks, especially when under the influence of drink or drugs.
- ✓ You should apply for a free European Health Insurance Card (EHIC) before you travel. If you already have an EHIC, make sure it hasn't expired.
- ✓ Be alert to the existence of street crime. Thieves tend to target money and passports so don't keep them all in one place. Keep a copy of your passport somewhere safe.
- ✓ The Emergency phone number is 112.
- ✓ Visit www.gov.uk/foreign-travel-advice/spain for more information.

BERMUDA

Watch Ben Ainslie make history in an island paradise



The world's greatest sailor will be leading Great Britain's strongest challenge for years, as the 35th America's Cup takes place in Bermuda in June. Visitors will find a warm welcome on this beautiful island renowned for its pink-sand beaches and turquoise waters.

When you're not watching the drama unfold out at sea in Bermuda's Great Sound, Bermuda is truly a slice of how the other half live. This beautiful island is actually a string of 181 islands which are dotted with delicately painted houses and impressive mansions. Bermuda's colonial past means that it benefits from a rich cultural mix of British, North American, African, Portuguese and West Indian influences. The islands' warm and welcoming climate

means that they are full of fragrant frangipani and bougainvillea flowers and the turquoise waters provide a rich variety of sea food. The islands are fringed with reefs which make Bermuda one of the leading sites in the world for diving. The reefs have resulted in many dramatic shipwrecks, which attract one of the Sargasso Sea's most regal fish, the barracuda, the tiger of the seas.

'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ Bermuda is a separate legal jurisdiction to the United Kingdom and has its own laws.
- ✓ The hurricane season in Bermuda normally runs from June to November. You should monitor progress of storms on the Bermuda weather service and National Hurricane Centre websites and follow the advice of the local authorities.
- ✓ Bermuda, while welcoming, is a conservative place and you should dress modestly. Bathing suits, revealing tops and short shorts should only be worn at the beach or pools. There are no nude or topless beaches and it is an offence to appear in public topless or wearing a bathing suit top. Drinking alcohol in public outside of licensed premises is not allowed.

- ✓ Homosexuality became legal under Bermuda law in 1994, but there's no official recognition of same sex couples or partnerships. Attitudes to homosexuality are tolerant but conservative and some people may not approve of public displays of affection between same sex couples.
- ✓ Visit www.gov.uk/foreign-travel-advice/bermuda for more information.

AZORES | PORTUGAL

Idyllic unspoilt islands – Europe's answer to Hawaii

Visitor numbers to the Azores increased by a third in 2016 with more and more holidaymakers wising up to the incredible delights of these unspoilt Atlantic islands. The Azores benefit from a year round mild climate, dramatic volcanic landscapes and seas teeming with dolphins, whales and manta rays.

The nine islands of the Azores are slowly opening up to larger numbers of tourists, following the introduction of direct no-frills flights in 2015. Visitors to the Azores will find themselves in a dramatic landscape with black sand beaches and beautiful small towns and villages that feel like stepping back to a gentler time. The islands are also an activity lover's delight where people can hike and mountain bike down country lanes fringed with hordes of azaleas and hydrangeas, or hike

up dormant volcanoes. At sea, nature lovers will be in for a treat – they can go whale watching, swim with dolphins or dive with manta rays. The main island of Sao Miguel will be in the spotlight in 2017 as its capital, Ponta Delgada, hosts the ABTA Travel Convention. Delegates and holidaymakers to the islands will be very pleasantly surprised both by the quality and low prices of the local food. Try the Portuguese tapas, petiscos, and the excellent local beer and wine.



'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ Gambling is only legal in establishments properly licenced by the government, like official casinos. Games of chance, including bingo, are illegal if they're held on unlicensed premises.
- ✓ You should apply for a free European Health Insurance Card (EHIC) before you travel. If you already have an EHIC, make sure it hasn't expired.
- ✓ Crime rates are low but pickpocketing, handbag snatching and theft from cars and holiday properties are common in major tourist areas. Be alert, keep sight of your belongings at all times and beware of thieves using distraction techniques.
- ✓ The Emergency phone number is 112.
- ✓ Visit www.gov.uk/foreign-travel-advice/portugal for more information.



Colossal, awe inspiring a land of extremes

Chile will be much easier to reach in 2017 as British Airways launches direct flights from the UK in January. A long, narrow country stretching along South America's western edge, it packs some incredibly diverse landscapes into its 4,000 km length, including volcanoes, forests, glaciers, fjords and the massive mountains of the Andes.

The capital, Santiago, is a delightful mix of sophisticated old world charm, high quality museums and a buzzy nightlife in the Barrios Brasil. Chile's main appeal is its countryside which is remarkably unspoilt and in a largely pristine condition. Due to its size, Chile is incredibly diverse, ranging from the arid Atacama Desert to the immense glaciers of Patagonia in the South. The pace of life in Chile is slow and relaxed with the local

people priding themselves on their hospitality to strangers, shared over a glass of mate tea or high quality local wine. Chile is also the perfect base for a flight to Easter Island (Rapa Nui to its native Polynesian inhabitants), with its 900 logic-defying, enigmatic Moai statues staring out to sea, some of the world's greatest cultural treasures.



'DID YOU KNOW' FACTS & FCO ADVICE

✓ If you are a British passport holder visiting Chile for less than 90 days, you do not need a visa. On arrival in Chile the immigration authorities will issue you with a 'Tarjeta de Turismo - Tourist Card', an A5 sized white form. You must retain this document and present it to immigration when you leave.

✓ Opportunistic street crime can be a problem in towns and cities, and in areas popular with tourists. Take care of your personal belongings at all times and be aware of your surroundings. Carry a photocopy of your passport and keep the original document in a safe place.

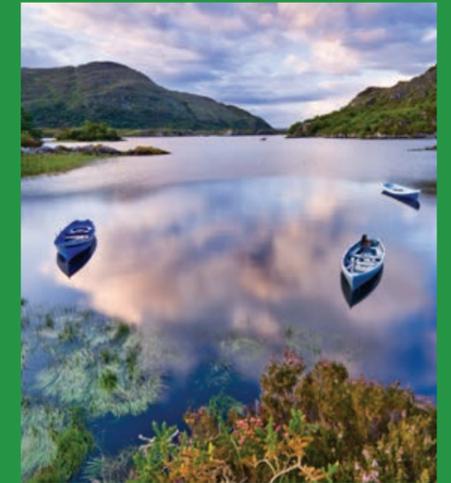
✓ Visit www.gov.uk/foreign-travel-advice/chile for more information



Feel the force in the gorgeous West of Ireland

The world's eyes will be on the beautiful County Kerry in 2017 as the latest Star Wars movie features the stunning County's Skellig islands. So come and feel the force and share the craic in one of the most magical and hospitable spots in the world.

County Kerry has long been regarded as one of – if not the – most beautiful spots in the Irish Republic. The intense greens of the landscape, the tranquil beauty of its lakes, soaring mountains, sweeping golden sands and dramatic sea cliffs, once seen are never to be forgotten. Travelling around the county is best done via two drives; the Ring of Kerry which travels through the Iveragh peninsula, and the Dingle peninsula whose wide sandy beaches have already featured in film in David Lean's epic, Ryan's Daughter. The island of Skellig Michael was home to early Christian monks whose beautiful beehive huts still dot the island. This rich cultural early Christian heritage is reflected throughout the county with ancient churches and Celtic crosses. On top of all this overwhelming beauty, the warmth, humour and hospitality of the Irish people is legendary, as is their ability to have a good time.



'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ The currency of Ireland is the Euro.
- ✓ New drink driving limits were introduced in 2011.
- ✓ Visit www.gov.uk/foreign-travel-advice/ireland for more information.



CROATIA

A Europe where your pound goes further

UK visitor numbers to Croatia grew substantially in 2016, and ABTA is predicting that this trend will continue in 2017 as holidaymakers look to take advantage of non-Eurozone prices. Croatia's thousands of miles of coastline are dotted with pebble beaches, surrounded by crystal clear waters and pine forests. Its many islands range from isolated idylls to hosts of dance festival extravaganzas. Zagreb, Split and Zadar are increasingly seen as city break destinations in their own right.

Dubrovnik on the Dalmatian coast remains the undisputed star of Croatian tourism with its picture perfect terracotta roofs, but savvy travellers are realising that it has a coastal rival in the north of the country in the Venetian town of Rovinj in Istria. Istria has strong Italian roots which are reflected in its architecture and cuisine, but not in its prices. Croatia's ancient history is strongly represented with a magnificent amphitheatre in Pula and most impressive of all, the Unesco world heritage site, Diocletian's palace in Split.

The capital, Zagreb, gives other European capitals a run for their money with its numerous and lively cafes, bars and restaurants, high quality museums, cultural events, beautiful parks and great nightlife. You can even use Zagreb for a skiing break with Mt Medvednica a short tram or bus ride away.

Zadar is a quirky, fascinating destination, make sure to visit the sound and light installations of the Sea Organ and

Sun Salutation.

Croatia has over a thousand islands which are easily accessible by ferry, including Korcula, covered in forests and vineyards, and trendy Hvar.



'DID YOU KNOW' FACTS & FCO ADVICE

- Walking shirtless or in swimming costumes is frowned upon in some town centres in Croatia. You should take notice of your surroundings including signage and judge what is appropriate. Some towns, such as Dubrovnik, have signage to show that the practice is prohibited by law and offenders will be subject to an on the spot fine.
- Carry your passport with you at all times. You must be able to show some form of identification

if required, including when checking into hotels. Keep a photocopy of the biographical details page in a safe place, including details of your next of kin. If your passport is lost or stolen you should report it to the police and get a police report.

- If you need to contact the emergency services call 112.
- Visit www.gov.uk/foreign-travel-advice/croatia for more information.

DENMARK

Happy people, great design, dark dramas and hygge!

Denmark is most definitely having its time in the sun, with its attractive, user-friendly cities, affluent happy people, world-class cuisine and design – and the Danish art of hygge at play everywhere you look. In 2017, Denmark's second largest city, Aarhus, will be taking its place in the spotlight as the European City of Culture.

Denmark is often cited as one of the world's best countries to live in. The strong welfare state ensures economic equality in society and there is virtually no crime or corruption, while polls repeatedly show that the Danes are among the happiest people in the world. Hard to explain and even harder to pronounce (it sounds a bit like "hooga"), hygge roughly translates as the state of cosiness, creating a nice, warm atmosphere and enjoying the good things in life with friends and family. Picturesque Copenhagen is now known to

millions as the location for numerous gripping Scandi noir thrillers and is home to some of the best restaurants in the world. New Nordic cuisine, music festivals, sandy beaches and fantastic architecture are just some of the reasons to book a trip this year.



'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ Crime levels are generally low, but pickpockets and bag-snatchers operate in crowded areas around Copenhagen.
- ✓ If you need to contact the emergency services call 112.
- ✓ Visit www.gov.uk/foreign-travel-advice/denmark for more information.



SARDINIA | ITALY

The "hot" Mediterranean island of 2017

UK holidaymakers are always looking for new island experiences in their favourite holiday playground, and in 2017 more and more will be finding out for themselves why discerning European holidaymakers come to Sardinia for a break.



Long stretches of outstandingly beautiful white sand beaches alternate with rocky headlands and walls of sheer cliffs, while the interior of the island offers awe-inspiring landscapes such as the peaks of the Gennargentu. Europe's jet set have been heading to Sardinia's Costa Smeralda for years and its jaw droppingly stunning beaches and bays remain a great place for watching the beautiful and rich at play. Savvy travellers are advised to head east to the unspoilt and much less crowded beaches of Orosei Gulf or Cala Gonone, many of which are only accessible by boat. One of Sardinia's most beautiful medieval cities, Alghero is the main resort in the northwest and is full of shady cobbled streets, Gothic palazzi and café-lined piazzas. It makes an ideal base for exploring the beaches and beauty spots of the nearby Riviera del Corallo. Sardinian food and wine is superb, though you may be advised to steer clear of the cheese called casu marzu, with its own special ingredient, live maggots!

'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ If you're visiting Italy you should get a free European Health Insurance Card (EHIC) before leaving the UK. The EHIC isn't a substitute for medical and travel insurance, but it entitles you to state provided medical treatment that may become necessary during your trip.
- ✓ Many major cities in Italy now impose a small tax on tourists. The tax is levied by hotels and is usually not included in any pre-paid arrangements or package deal.
- ✓ By law you must be able to show some form of identification at all times.
- ✓ The Emergency phone number is 112.
- ✓ Visit www.gov.uk/foreign-travel-advice/italy for more information.

KERALA | INDIA

Lush, laid-back luxury in your very own floating hotel

2017 marks the 70th anniversary of India's independence, and what better way to celebrate than a trip to the beautiful Southern coastal state of Kerala. Blessed with a rich bounty of natural attractions – serene beaches, enchanting backwaters, tea-covered hill stations, lush green forests and exotic wildlife, Kerala offers a multitude of experiences for holidaymakers.

One of Kerala's most unique geographic features is an extensive network of backwater lagoons, lakes, estuaries and canals which snake through the heart of this South Indian state. A journey through these placid waters is best enjoyed in a luxuriously furnished Kerala 'houseboat', as the life of the local people, spice plantations and forests slowly unfold before you. The food on board the houseboats is freshly prepared, with coconut, prawns and delicately-spiced fish featuring heavily; it's a

delicious and healthy mix. Other highlights of this state include the spice and tea plantations near the former British hill station of Munnar and a wide variety of picturesque, palm-fringed beaches to satisfy the most die-hard sunseeker. The land is a true haven for travellers looking for the healing touch of Ayurveda, the 5,000-year-old system of medicine still practised to perfection throughout the state.



'DID YOU KNOW' FACTS & FCO ADVICE

- ✓ You'll need to get a visa before travelling to India. You can find further information about how to apply on the Indian High Commission website.
- ✓ The Indian Ministry of Tourism has a 24-hour multi-lingual telephone helpline on toll free number 1800 111 363 providing visitors to India with information about travel and tourism.
- ✓ The laws governing alcohol vary from state to state. Seek advice from your local travel agent/hotel or the authorities to ensure you're aware of any alcohol prohibition in the state. During major religious festivals, national holidays and elections a ban on the sale of alcohol is often imposed.
- ✓ Women should use caution when travelling in India. If you are a woman travelling in India you should respect local dress codes and customs and avoid isolated areas, including beaches, when alone at any time of day.
- ✓ Indian customs has strict rules about goods and currency that can be brought into and taken out of the country. Failure to declare contents you're carrying which may be prohibited or subject to a tax or duty payment can lead to heavy penalties including imprisonment.
- ✓ Hobbies involving cameras and binoculars, like bird-watching or plane spotting, may be misunderstood particularly near military sites, government buildings, airports and railway stations.
- ✓ Visit www.gov.uk/foreign-travel-advice/india for more information.

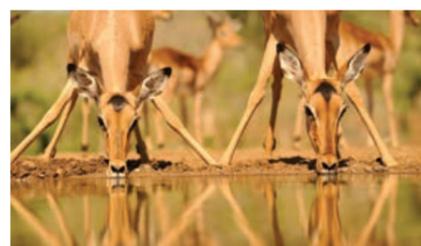
SOUTH AFRICA

The country that has everything – but won't break the bank

South Africa is expecting a bumper year in 2017, following an 11% increase in UK visitors in 2016 as holidaymakers look to take advantage of one of the few countries in the world where the pound enjoys a very good exchange rate.

South Africa is a David Attenborough series in one country with hippos, lions and penguins, deserts, jungles, pounding surf and spectacular flora all waiting to be experienced.

Cape Town is one of the most beautiful cities on earth with its spectacular location and the iconic Table Mountain in the background. The country has a number of national parks ranging from the savannah of Kruger National Park where you can catch sight of Africa's most magnificent beasts, to the iSimangoliso Wetland Park whose diverse habitats attract both dolphins and zebras. The Spring is one of the best times to go with very pleasant temperatures and the area of Namaqualand covered in millions of beautiful wild flowers. Hire a car and head off on the stunning garden route where you can stop off at high quality lodges and hotels offering great quality, good value cuisine. Don't forget South Africa's history with trips to the battlefields of KwaZulu or Robben Island where Nelson Mandela was imprisoned. Lastly, see another two sides of this stunning rainbow nation, knocking back a glass or two of homebrew in a shebeen in a township and a few glasses of chenin blanc or pinotage in the Winelands.



'DID YOU KNOW' FACTS & FCO ADVICE

✓ Your passport should be valid for a minimum period of 30 days from the date of exit from South Africa. Your passport should have at least two blank pages when you present it at immigration to enter or leave South Africa.

✓ Immigration rules require parents travelling with children (under 18) to show the child's full unabridged birth certificate (or a certified copy). The South African Department of Home Affairs are not accepting uncertified copies of birth

certificates or copies of the parents/guardians identification. There are additional requirements if the child is travelling with only the one parent, with neither biological parent, or unaccompanied.

✓ Always carry your identity documentation or a copy of your passport. You'll need to be able to produce valid identification on request by South African officials.

✓ The risk of violent crime to visitors travelling to the main tourist destinations is generally low. The South African authorities give high priority to protecting tourists and tourism police are deployed in several large towns. Most cases of violent crime occur in the townships. Consult a reliable tour guide if you visit a township.

✓ Visit www.gov.uk/foreign-travel-advice/south-africa for more information.

Head South for a different take on the USA

Music lies at the very heart of the Southern States of America. Jazz, the Blues, Rock & Roll, Country and Bluegrass all have their roots here. Whether you're in the smoky mountains of Tennessee or the bustling French Quarter of New Orleans, music has shaped these states, resulting in a unique melting pot of cultures.

The British travel industry is discovering the charms of the Southern states of America in 2017, with British Airways launching direct flights to New Orleans in March and Virgin Holidays offering tours to Elvis's home in Memphis, Tennessee as well as to Kentucky, home to Bluegrass and bourbon. The South is famed throughout the USA for the warmth and hospitality of its people and for its wholesome food, with specialities such as seafood gumbo and grits proving particularly popular. Whisky-lovers can explore Kentucky's

Bourbon Country where they can experience the art of bourbon-making being practised much as it was 200 years ago.

The Southern States are renowned for their incredibly diverse landscape, from the Mississippi in Louisiana to the rolling hills of Kentucky's Bluegrass Region, considered to be the 'horse capital of the world'. Must-visit sites on the music trail include Nashville, New Orleans, and the homes of Dolly Parton and Elvis.



'DID YOU KNOW' FACTS & FCO ADVICE

- You'll need prior authorisation to enter the United States using a British passport, either through a visa, a Permanent Resident Card, or the Visa Waiver Programme.
- You must carry a passport showing that you have leave to enter or remain with you at all times.
- In some States you can drive using a UK driving licence, in other States you may need to get an International Driving Permit. Check with your rental car provider before you travel. Learn US traffic laws before going to the country. Both the speed and drink driving limits are lower than in the UK.
- Laws vary from state to state. When you are physically present in a state, even temporarily, you are subject to that state's laws.
- Visit www.gov.uk/foreign-travel-advice/usa for more information.

New direct routes from the UK bring this fascinating country closer

A country of contrasts, versatile Vietnam offers beaches, mountains, modern cities and ancient wonders. Forty years on from the turbulent conflict, Vietnam is going places – come and join the ride.

The major cities of Ho Chi Minh City (Saigon) in the South and Hanoi in the North make ideal book ends for a trip. Hanoi's architecture reflects its colonial past and Ho Chi Minh City is an exhilarating assault on the senses. Away from the cities, stand outs include the majestic Karst limestone stacks of Halong Bay,

the Mekong Delta and the spectacular cave system of Phong Nha-Ke Bang National Park.

Riverside Hoi An is a beguiling town, famous for its talented tailors, fine foods and Japanese architecture. To understand more of Vietnam's recent history, don't miss the fascinating Cu

Chi tunnels, which offer a look at the underground life of Vietnamese soldiers. In 2017, the world's largest tour operator TUI will be taking holidaymakers to the stunning Phu Quoc Island in south Vietnam. Vietnam boasts a fantastic street food scene thanks to local, Chinese and French influences – try a *bahn mi* (baguette) or slurp on Pho.



'DID YOU KNOW' FACTS & FCO ADVICE

- Until 30 June 2017 'British Citizen' passport holders travelling for tourism or business can enter Vietnam for up to a maximum of 15 days without a visa. You must get a visa before you travel to Vietnam if you want to stay for longer than 15 days and/or if you wish to re-enter Vietnam within 30 days of your departure.
- Never take photographs near military installations.
- When entering religious or cultural sites respect local customs and dress in appropriate clothing.
- There are restrictions on internet use, which can affect access to social media websites.
- Tropical cyclones affect the eastern coastal regions. The season normally runs from May to November, but tropical cyclones can occur outside this period. Heavy rainfall could lead to flooding and landslides. You should monitor the progress of approaching storms and follow the advice of the local authorities.
- Visit www.gov.uk/foreign-travel-advice/vietnam for more information.

Taking a few simple steps of preparation before and during your travel overseas can help to ensure a trouble-free trip.

THESE INCLUDE:

➔ Fully research the destination you intend to visit before travelling. It is a good idea to find out the local laws and customs of the relevant country – there may be serious penalties for breaking a law that might seem trivial at home. For more information visit www.gov.uk/foreign-travel-advice.

➔ Whatever your age or fitness level, take out appropriate travel insurance and ensure you are covered for all of the activities you intend to do, such as moped hire or water sports. Remember that most policies exclude cover for events that happen after excessive alcohol consumption.

➔ If travelling within the European Economic Area (EEA) or Switzerland, get a free European Health Insurance Card (EHIC) to give you free or reduced cost emergency care. You still need full travel insurance though as the EHIC doesn't cover other costs such as returning you to the UK. You can call 112 to contact the emergency services in any EU country.

➔ Research the health risks of the country you are visiting as soon as possible before travelling, so you can get the right vaccinations and take other preventative measures if required (e.g. malaria tablets). Visit www.nhs.uk/livewell/travelhealth for more information.

➔ Check your passport is valid for your full trip (some countries require 6 months validity from the end of your visit) and has emergency contact details filled in. Be sure you have all necessary visas.

➔ Don't take risks with the law abroad – or you could end up throwing years of your life away in a foreign prison. Many countries have a zero-tolerance approach to offences involving drugs and sentences can be long.

➔ Take enough money with you, and make sure you have access to emergency funds. Don't keep all your money in the same place.

➔ Value your passport and keep it safe. Make photocopies of your passport – leave one with friends or family and take another with you, or store it online using a secure data storage site.

➔ Tell family or friends in the UK where you are going, and leave emergency contact details with them.

➔ If you plan to drive overseas, familiarise yourself with local driving laws and make sure your licence is current and valid where you are going.

➔ Find out where the nearest British Embassy or Consulate will be and note the contact details. For more information visit www.gov.uk/government/world/embassies.

➔ For more information visit www.gov.uk/travelaware. If you have any enquiries for FCO consular staff before you go or while abroad you can ask questions via the FCO's Twitter service @FCOtravel. This service adds to the ways that British people travelling or living overseas can already get in touch with the FCO: by emailing the travel advice team or contacting local consular staff.

The FCO travel advice provided in this report is up-to-date at the time of writing and is subject to change.



What the FCO can and cannot do to help British nationals abroad.

The FCO's priority is protecting the welfare of British nationals abroad, and consular staff overseas will do their best to assist people when they suffer serious problems. However, it is important to know what the FCO can and cannot do to help.

THE FCO CAN:

- ✓ Issue you with an emergency travel document
- ✓ Provide information about transferring money
- ✓ Provide help if you have suffered rape or serious sexual or physical assault, are a victim of other crimes, are ill or in hospital
- ✓ Give you a list of local lawyers, interpreters, doctors or funeral directors
- ✓ Contact you if you are detained abroad
- ✓ Contact friends and family back home for you if you wish
- ✓ Provide help in cases of forced marriage

THE FCO CANNOT:

- ✗ Help you enter a country if you do not have a valid passport or necessary visas
- ✗ Give you legal advice or translate documents
- ✗ Investigate crimes or get you out of prison
- ✗ Get you better treatment in hospital or prison than is given to local people, but we will raise concerns if treatment falls below internationally recognised standards
- ✗ Pay any bills or give you money
- ✗ Make travel arrangements for you
- ✗ Assist people affected by parental child abduction

OBSERVATIONS FROM THE FCO

In 2015/16 the Foreign and Commonwealth Office (FCO) supported over 23,000 British nationals who needed serious assistance abroad and issued more than 31,000 emergency travel documents to help British people travel back to the UK. The FCO also led the UK government response to nine major crises from April 2014 to March 2015, and played a critical role in supporting British nationals in crisis situations since then.

Travel Aware replaced Know Before You Go as the FCO's consular prevention campaign. The FCO and ABTA have continued to work together effectively to provide British nationals with information on how to stay safe and healthy abroad.

In 2016 ABTA actively supported campaigns on a range of issues, including looking after your passport, safety on winter

sports holidays, youth campaigns, and the launch of Travel Aware.

travel aware
gov.uk/travelaware

Supporting British nationals abroad

Between 1 April 2014 and 31 March 2015 FCO staff handled 23,571 consular assistance cases around the world. This represents a slight increase on the year before but comes at a time when British nationals are travelling abroad more often. It continues to underline the importance of travelling aware and understanding how the FCO can help those who get into difficulty overseas. In 2015 British nationals made over 65 million trips overseas, according to the Office for National Statistics.

Among the 23,571 cases FCO staff handled were 3,608 deaths, 3,851 hospitalisations and 5,123 arrests. The highest number of assistance cases were reported in Spain, the USA, France and Australia, all of which are countries with high volumes of British visitors.

Passports and travel documents

FCO staff issued 31,340 emergency travel documents in 2014/15. Spain, the USA and Australia were the highest volume countries. Taking care of your passport and other travel documents remains a core message of the 'Travel Aware' campaign. It was central to this year's 'Passport Hustle' campaign where the FCO worked again with stealth crime expert James Freedman, to highlight some of the ways in which your passport might be stolen overseas.

DID YOU KNOW...

75%

of people **expect** their holiday company to be a **Member of ABTA**

76%

of people feel **more confident** booking a holiday with an **ABTA Member**

63%

of people feel **less positively** of companies that are **not ABTA Members**

65%

of people feel that **ABTA's help and advice** in the event of a crisis is **essential**

ABTA RESEARCH

Consumer research mentioned throughout this report was conducted by Arkenford Ltd (www.arkenford.co.uk) who specialise in leisure and tourism market research. The ABTA Consumer Trends survey generated

responses from a nationally representative sample of 1,962 consumers using an online research methodology and related to holiday booking habits in the 12 months to August 2016. Fieldwork was conducted in August 2016.

ABOUT ABTA

ABTA has been a trusted travel brand for over 65 years. Our purpose is to help our Members to grow their businesses successfully and sustainably, and to help their customers travel with confidence.

The ABTA brand stands for support, protection and expertise. This means consumers have confidence in ABTA and a strong trust in ABTA Members. These qualities are core to us as they ensure that holidaymakers remain confident in the holiday products that they buy from our Members.

We help our Members and their customers navigate through today's changing travel landscape by raising

standards in the industry; offering schemes of financial protection; providing an independent complaints resolution service should something go wrong; giving guidance on issues from sustainability to health and safety and by presenting a united voice to government to ensure the industry and the public get a fair deal.

ABTA currently has around 1,200 Members with a combined annual UK turnover of £33 billion. For more details about what we do, what being an ABTA Member means and how we help the British public travel with confidence, visit abta.com.

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