

INTRODUCTION



This report draws on market information, news from ABTA Members and ABTA research to reflect on the past year, and to look ahead at the prospects and trends for 2018.

The past 12 months have been challenging for the wider UK economy, with inflation outstripping wage growth and a continued assault on the value of the pound providing the backdrop to the year. Despite this, our research shows that the underlying demand for holidays remains very strong, and more British people are taking more holidays than at any time since 2011. The travel industry has a history of adaptation and innovation and it continues to be incredibly dynamic, with travel companies evolving and innovating to meet the needs and desires of their customers. New destinations are emerging as people look for more authentic experiences, and niche trends are becoming mainstream. With this in mind, we have 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 2018 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

become more accessible thanks to new flight routes, it could be that it is hosting a major event, 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. In 2018 in particular the theme of 'responsible tourism' is a common thread which runs through many of our destination choices, as the importance of creating better places for people to live in, and better places to visit, takes centre stage.

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.

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Mark Tanzer
Chief Executive



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12 DESTINATIONS TO WATCH





















1 Argentina

The best steaks in the world, a sophisticated capital city, the wide plains of the Pampas, glaciers of Patagonia and the breathtaking Iguazu falls, all at very affordable prices.

2 Arizona

Some of the most dramatic, iconic landscapes in the world; where reality is so much more impressive than in the classic western movies.

3 British Columbia

The welcoming land of winter sports, lakes, forests, vineyards and friendly towns. It is perfect for active holidaymakers who make the most of its awe-inspiring locations by hiking, kayaking and in the long winter, skiing.

4 Germany

Amazing cities blending the best of old and new architecture, cutting edge cultural experiences from world class orchestras to art galleries, fairytale castles and magical winter markets.

5 Malta

Thousands of years of history, incredible honey coloured towns and world-class diving make Malta very hard to beat.

6 Montenegro

A perfect compact package of unspoilt countryside, beautiful high quality resorts and pine-clad hills dropping to the clear Adriatic Sea.

7 Nepal

Truly unforgettable experiences await in this intensely spiritual country, where you will be guided by hospitable local people through towering mountains and national parks teaming with wildlife.

8 New Zealand

An alluring mix of Polynesia and Europe with incredibly diverse scenery, stunning coastlines, delicious wine and food and intensely proud but welcoming inhabitants.

9 Rwanda

This award winning sustainable African jewel packs a great deal in and its people treasure and respect their heritage of lush and diverse forests, fertile plantations and a wide range of wildlife.

10 St Lucia

In 2018 a year of festivals takes place in this friendly Caribbean paradise, all set in crystal clear waters with coral reefs and brilliantly coloured fish, so come and join the carnival!

11 Sweden

The Swedes have a word for it "Lagom" – everything in perfect balance – and when you visit this country of beautiful design and cities, stunning countryside and Baltic beaches you will agree.

12 Turkey

An incredible land, rich in history, culture, beautiful beaches and wonderful cuisine, Turkey offers great value-for-money holidays in picturesque resorts.

2017 MARKET OVERVIEW

Over the past year, ABTA research shows that more British holidaymakers have taken more holidays than at any point in the last five years.

However, a savvier breed of holidaymaker has emerged, with people responding to challenging market conditions by planning further ahead to get the holiday they want, and by managing their holiday budgets more carefully.

In 2017, the summer overseas package holiday market was up by 8%² year on year. However, as with 2016, there were destination winners and losers, with the Western Mediterranean continuing to be the biggest draw. Spain (including mainland Spain, the Balearics and the Canaries) saw an increase of 11%, Italy 10%, Greece 7% and Portugal 6%.3 With restrictions on flights to Sharm el Sheikh airport still in place, travel companies responded by promoting trips to other parts of Egypt – in particular the Red Sea resort of Hurghada and the tourist destinations along the Nile - resulting in a significant increase of 66% in visitor numbers year on year⁴ to the country. Holidaymakers were also prepared to travel further afield, with Africa, Asia and the Caribbean all seeing an increase in bookings. By contrast, bookings to the USA decreased by 3%⁵ in summer 2017, most likely as a result of the fall in the value of the pound against the dollar.

Domestic tourism enjoyed another very strong year, with 72% of people taking a UK break in the last 12 months⁶.

City breaks continued to be the nation's favourite holiday type in 2017, with over half the population having taken one, according to ABTA research. Beach holidays remain the second most popular holiday type and they saw an increase of 3% on 2016, following a dip the previous year, as travel companies sought to add capacity in popular destinations.

Global political and economic uncertainty, a heightened terror threat and natural disasters impacting some well-known tourist destinations were never far from the headlines. We saw terrorist attacks in Manchester, London and Barcelona, political unrest in The Gambia, a devastating earthquake in Mexico and Hurricanes Harvey, Irma and Maria tearing through Texas, Florida and the Caribbean.



Several travel companies collapsed, including the Monarch Travel Group — the largest British airline failure in history. With the travel industry and Government stepping in to bring home all 110,000 people stranded overseas, the whole issue of consumer financial protection was thrown into the spotlight and is now being reviewed by the Government.

The Brexit negotiations continued to dominate the news, but the fall in the value of the pound did not appear to put people off holidaying in Europe in 2017. The EU remains the UK's largest travel destination and consumer confidence in travel to EU destinations has held up well.

ABTA Holiday Habits report 2017
 GfK – Travel Leisure Monitor October 2017
 3.45 Ihid

The summer overseas package holiday market was up by 8% year on year

The fall in the value of the pound did not appear to put people off holidaying in Europe

2018 MARKET OUTLOOK: OVERSEAS HOLIDAYS

While there are some encouraging signs in the market pointing to a positive year ahead, there are concerns around the squeeze on consumer disposable income, as well as the great unknowns around the outcome of Brexit negotiations.

The positive sentiment seen in the market earlier in 2017 has held up well as we move into 2018, despite uncertainty created by world events, political upheaval and economic pressures. Although there is continued pressure on consumer spending power, ABTA research shows a notable increase in people planning to spend more on their holidays in the next 12 months. Over three in ten people (31%) plan to spend more, compared to 24% who stated this in 2016, with only 14% of people planning to spend less.

As 2017 draws to a close, early bookings for overseas holidays also appear strong for 2018, with industry figures showing bookings for next summer tracking 5% above last year.⁷ This may be a reflection of the growing trend for early booking, with people keen to secure their preferred resort or destination in an increasingly competitive market.

City breaks and beach holidays are expected to remain the top holiday choices for 2018.

Over half of all holidaymakers (51%) are planning to take a city break and 47% are planning to take a beach holiday, an increase on numbers in the past 12 months. All-inclusive packages are expected to perform particularly well as holidaymakers look to manage their budgets in light of the continuing uncertainty around Brexit and a volatile GBP. Almost a quarter of people (23%) are thinking of taking an all-inclusive holiday in 2018, with young families particularly attracted to this type of holiday, 34% of whom expect to take one in 2018.

Whilst the Western Mediterranean has been the big draw for the past two years, early indications are that holidaymakers will start travelling back to destinations in the Eastern Mediterranean. In particular, bookings for Turkey saw a significant increase of 69% for Summer 2018, whilst Egypt is continuing on its road to recovery with a 24% increase in bookings. With Tunisia also back on the radar after the Foreign Office changed its



travel advice warning against all but essential travel in July 2017, several tour operators are starting to sell holidays there again in 2018. This North African favourite is also likely to see British holidaymakers returning next year.

With March 2018 heralding the one year countdown until the UK leaves the EU, ABTA is urging Brexit negotiators to prioritise a deal on travel, and to safeguard air routes as a matter of urgency, not least because the EU is the UK's largest travel destination. Our research shows that 36% of people are confused about how Brexit will affect their holiday plans, with only 19% feeling well informed about the implications of Brexit. In spite of this, nearly two-thirds of people still intend to travel to Europe in the next 12 months, suggesting that British holidaymakers remain committed to Europe as a holiday destination.

⁷ GfK – Travel Leisure Monitor October 2017
⁸ Ibid



2018 MARKET OUTLOOK: DOMESTIC HOLIDAYS

After two very strong years for domestic tourism, it is likely that this part of the sector will continue to enjoy a positive 2018, thanks to wider economic factors.

2017 saw a boost in domestic holidays, with VisitEngland reporting a 3% increase in visits between January and August — and over 33 million trips taken. Britons holidaying at home also spent a record £7.9 billion in the same period, up 6% on 2016.

The UK looks set to be once again the most popular destination overall for holidays in 2018, with two-thirds (66%) planning a UK break according to ABTA research. These figures are likely to increase with the much-publicised announcement of Prince Harry and Meghan Markle's wedding, billed for the late May Bank holiday.

In 2018, VisitEngland's 'Join the World – Discover the UK'⁹ campaign will continue to showcase the best of what the nation has to offer, and is expected to generate more than one million additional overnight stays, with an £80 million boost to the economy. Part of the Government's GREAT Britain initiative, VisitEngland, in partnership with the national tourism organisations of Northern Ireland, Scotland and Wales, will inspire young people from Great Britain and Northern Ireland to take a holiday at home.

2018 will mark two important 100th anniversaries, that of the Royal Air Force and the right for women to vote. The Royal Air Force will celebrate its centenary year with local, regional and national events, including a live broadcast from the Royal Albert Hall, a service at Westminster Abbey and a parade of military personnel along The Mall to Buckingham Palace. To celebrate women's suffrage, Parliament will launch Vote 100, a year-long celebration of women's voices in Parliament where there will be an extensive programme of themed events, tours and talks. In Manchester, the People's History Museum will dedicate its 2018 programme to the suffragette movement, and the former home of Emmeline Pankhurst, the Pankhurst Centre, will curate and open a new exhibition in February.

Liverpool will celebrate 10 years since it was European Capital of Culture (2008) with a programme of events throughout the year –

including the world-famous Terracotta Warriors arriving at the World Museum in February. Further south, Bristol is preparing for a year of new offerings – Being Brunel, the state-of-the-art museum, will open as part of a major redevelopment of Bristol's Floating Harbour area; a new public arts trail will launch; and 2018 is the 40th anniversary of the Bristol Balloon Fiesta in the summer.

Short-breaks in England have grown in popularity in recent years, and with the Lake District recently announced as a UNESCO World Heritage Site, areas such as Lake Windermere are expected to continue to see a rise in popularity for weekend breaks. Whilst traditional resorts such as Eastbourne, Llandudno, Bournemouth and Torquay are still likely to attract the most visitors in 2018, holidaymakers are also keen to explore new areas in the UK too¹⁰.

9 www.visitbritain.com/jointheworld

¹⁰ Shearings holiday data 2017

The UK looks set to be the most popular destination overall for holidays in 2018



2018 MARKET OUTLOOK: CRUISE

The interest in cruising is growing at a rapid rate; 14% of UK holidaymakers plan on taking a cruise in the next 12 months, almost double the number that went on one in the past 12 months."

In particular, the growth in European river cruising looks set to continue in 2018, with river cruises becoming more active and responding to the fast developing millennial market.

River cruising is the fastest-growing sector of the worldwide cruise market with many new vessels being introduced, together with new facilities to rival ocean liners. The majority of growth comes from European cruises, with the Rhine/Moselle followed by the Danube leading the way as the most popular routes. ¹² A popular new development within this sector is the growth of more active trips, where holidaymakers can combine taking in the scenery with activities such as hiking along smugglers' routes, sampling local specialities or rock climbing.

As river cruises move away from the perception of a sedentary type of holiday, several exciting new initiatives are being launched which are designed to appeal specifically to Millennials and Generation X. For example, the new U by Uniworld River Cruises offers a different type of experience for the next generation along the "Instagram and Snapchat-worthy" rivers of Europe. Sunrise yoga, rooftop bars, international DIs and farm-to-table cuisine

are just some elements of the new cruise experience for the younger market.

Millennials are showing significant interest in cruise holidays, with more than one in ten holidaymakers between the ages of 18-24 planning a cruise for next year, according to ABTA research. The wider cruise industry is investing in tech upgrades to appeal to the next generation of holidaymakers, with Royal Caribbean, Carnival and MSC among those capitalising on new technology and lightning fast Wi-Fi across their fleets.

Further afield than Europe, new, more exotic cruise destinations are opening up in 2018. For example, on Fred Olsen's latest routes, passengers can discover the souks and castle of the Omani city of Khasab, visit the birthplace of Gandhi in Porbandar, India or stop to witness amazing wildlife along the stunning coastline of South Africa. Thanks to new direct flights from Manchester to Seattle, new cruise routes are becoming available to Alaska. With



a variety of new routes on offer, British cruisers will have a wealth of scenic destinations to choose from in 2018.

ABTA Members report that passengers are looking for more flexibility and choice in 2018. For example, TUI's newly-branded Marella Cruises have seen an increase in its 'Cruise and Stay' bookings, where customers can opt to stay in a TUI hotel or resort as part of their trip. In addition, more customers than ever are choosing to depart from the UK and these numbers look set to rise in the next year¹³.

Finally, all-inclusive cruises are expected to be an appealing option for holidaymakers in 2018. With the likelihood of continued currency fluctuations amidst Brexit negotiations, they eliminate the stress of additional and unexpected costs once on holiday.

¹¹ ABTA Holiday Habits 2017 ¹² www.cruising.org/docs/default-source/research/ uk-amp-ireland-cruise-review-2016.pdf?sfvrsn=0



1

RESPONSIBLE TOURISM TAKES CENTRE STAGE

2017 saw a tipping point in the importance of responsible tourism.

ABTA research shows that almost 70% of people now believe that travel companies should ensure their holidays help the local people and economy. Following the huge public rise in sentiment for programmes such as David Attenborough's 'Blue Planet II' – the most watched programme of 2017 – and campaigns like Sky News' Ocean Rescue Scheme. this trend looks set to

continue and take centre stage in 2018. With a greater public awareness not only of environmental issues, but also of human rights and working conditions, tour operators and hoteliers are supporting this move towards responsible tourism that looks after our environment and our people. In 2018, we can expect more initiatives such as social enterprise projects which give back to local communities, carbon-neutral group tours and the banning of plastics

from beaches. The welfare of animals in tourism has become a mainstream issue, with Thomas Cook committing to removing animal excursions such as elephant rides and swimming with dolphins from their activities list. Virgin Holidays also announced they will no longer sell or promote any new attractions or hotels that feature captive whales and dolphins.







2

A TASTE FOR ALTERNATIVE DESTINATIONS

Whilst concerns over the number of tourists in popular destinations have been around for a long time, 2017 marked a turning point. With the growth of the peer-to-peer economy and the arrival of more tourists from new markets, we saw local residents in some cities protesting about the negative impacts of too many tourists. Dubbed 'over-tourism', this has become an issue

in landmark tourist destinations such as Barcelona, Venice, Palma and Santorini.

Destination authorities, local government, local businesses and the travel industry can collaborate to better manage tourism for the benefit of locals and tourists. This might include encouraging alternative times of year or alternative sites, but it can also

include better management of the impact of tourism on local people.

Holidaymakers may respond in 2018 by trying somewhere new, with over a quarter (27%) planning to visit a country they've never been to before and almost a third (32%) expecting to visit a new resort or city.





PACKAGES PROVIDE CERTAINTY

Package holidays remain the single most popular booking option for foreign holidays, with over half (51%) of people taking one in the past 12 months. One of the main reasons for choosing a package is because it provides 'the best value option for price', and 2018 should see this trend continue as people look for options where they can plan ahead on a fixed budget. This will be particularly important in light of political and economic uncertainty, as holidaymakers look to protect themselves against likely currency fluctuations. TUI has seen a sharp uplift in 2018 package holiday bookings for Turkey as customers choose destinations which provide good value for money, and Jet2holidays recently announced its biggest ever winter 18/19 flights and holiday programme from Manchester, with over 830,000 seats on sale.





4

LOW-COST LONG-HAUL OPENS UP

2017 saw a surge in low-cost long-haul air travel, with a number of carriers such as Norwegian Airlines, WOW Air and Eurowings ramping up their offering to compete with more established long-haul names.

In response to the capacity squeeze in the Western Mediterranean and the drop in the value of the pound against the euro, increasing numbers of holidaymakers are taking advantage of the wider availability of low-cost long-haul flights to travel further afield for a similar price. Low-cost airlines will continue to grow with new routes and ambitious expansion plans – for Norwegian in particular, long-haul is the driving force behind its expansion and they expect to grow by 35% in 2018. TUI is also expanding its long-haul capacity with more fuel-efficient aircraft. With flights from London to New York averaging around £200 return, and wider availability of new aircraft such as Boeing's Dreamliner making longer

journeys more attractive and comfortable, low-cost long-haul will be going mainstream in 2018



5

LUXURY MEETS ESCAPISM

Holidaymakers looking for a new experience in 2018 may well find themselves travelling on an 'Air Cruise', via a 'Boom Supersonic' or even into space, thanks to a host of new travel technologies which are set to revolutionise consumer travel. A 20-tonne Airlander 10 'Air Cruise' – the world's ultimate airborne cruise ship is set to be tested by luxury travel firm Henry Cookson Adventures in 2018, as is Boom's Supersonic aircraft, labelled the new Concorde. Perhaps the most ambitious of them all, Virgin Galactic, is aiming to launch full commercial passenger operations to space by the end of 2018 – however, with seats currently selling for \$250,000, it's not for the masses just yet!

With worldwide film sales of 'Murder on the Orient Express' hitting almost \$200 million in 2017, it seems that luxury rail travel is back on the map and sales are expected to increase in the next year. Several new luxury trains were launched across the world this past year, including the Twilight Express Mizukaze and Train Suite Shiki-Shima in Japan and South America's first luxury sleeper train, the Belmond Andean Explorer. Closer to home, the Venice Simplon-Orient-Express has announced a new departure to coincide with the 25th Venice Grand Masquerade Ball in February 2018 which is expected to be a sell-out.



Passion, flair and the world's best steak

Savvy travellers will be heading to Argentina in 2018, taking advantage of an excellent exchange rate and the availability of low-cost flights. One of South America's most diverse and sophisticated countries, its rich cultural mix makes the home of the tango both familiar and exotic in equal measure.

All trips to Argentina should ideally start in the capital, Buenos Aires, with its wide elegant boulevards and cosmopolitan areas such as San Telmo and La Boca. It will also offer a first taste of Argentina's world-class steaks, its renowned full-bodied wine, Malbec, and the nation's favourite beer, Quilmes. Just a short drive away are the Pampas — enormous grassy plains where the Gaucho lifestyle can be sampled on an Estancia, a luxury ranch. Travelling around this expansive country is easy with very comfortable luxury coaches,

but for longer trips it is better to fly. Head west into the wine country of Mendoza and then fly to the north for the awe-inspiring Iguazu Falls on the Brazilian border. Finally, head to the far south for the fjords and glaciers of Patagonia which, if desired, can be used as a starting point for a cruise, or even a flight, to Antarctica, with the first regular flights due to start in 2018.







'DID YOU KNOW' FACTS & FCO ADVICE

You don't need a visa to enter

Argentina as a tourist. On presentation of a valid British passport you'll normally be granted a 90-day stay in the country.

If you take part in extreme or adventure sports (including paragliding, climbing, off-road driving and hot air ballooning), make sure your travel insurance covers all the activities you want to undertake. Only use reputable operators, insist on training and make sure adequate safety precautions are in place.

To contact the emergency services, call 911 or 101 (police), 107 (ambulance) or 100 (fire). Assistance is also available in English from the Tourist Police in Buenos Aires and Mendoza. In Buenos Aires, call +54 (0)11 5789 8913 (7am to 9pm) or +54 (9)11 6633 5656 (9pm to 7am). In Mendoza call +54 (0)261 413 2135.

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



The dramatic, awe-inspiring landscapes of the authentic Wild West

Holidaymakers looking for the authentic Wild West experience will be able to fly direct to Phoenix in 2018, thanks to the introduction of new routes.

The dramatic landscape is incredibly familiar, due to its use as a backdrop for thousands of films, but it needs to be seen in person to truly appreciate the breathtaking scenery. Arizona is also ideal for a road trip, so don't forget your driving licence. The undoubted showstopper on any trip, whether it be by road or helicopter, is the Grand Canyon, not just for its unforgettable views at the rim; those looking for more of a challenge can opt to hike into its depths to get a real feel for its enormous scale. The massive rock formations of Monument Valley are no longer known just as 'John Wayne country' but also as the home of the





Navajo Nation and before them the Ancestral Puebloans. Further south, the Chiricahua National Monument offers a beautiful landscape of multi-coloured volcanic rocks sculpted into weird and wonderful shapes by the wind and rain. After the heat and dust, the pine forest-surrounded town of Sedona is a fantastic stop-off point. Sedona has attracted creative types for many years and is full of vibrant alternative galleries and great restaurants. It's also a great base to explore the surrounding canyons, and for activities such as hiking, swimming and camping.



'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. Most passport holders can get an Electronic System for Travel Authorisation (ESTA) through the Visa Waiver Programme, which allows travel to the US for up to 90 days.

If you need consular assistance while in Arizona, contact the British Consulate General in Los Angeles.

Traffic laws vary from state to state.

If you're planning to drive, check the driving rules in Arizona and any other state(s) you'll be visiting.

To contact the emergency services,

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

BRITISH COLUMBIA | CANADA

The perfect blend of man and nature in this Canadian paradise

The greatest city on earth? New York, London, Paris? Think Vancouver, in Canada's British Columbia (BC), which is regularly voted as one of the world's best cities to live in.

This cosmopolitan seaport effortlessly blends beautiful architecture with the stunning wilderness that characterises BC, which is best seen as you walk over the suspension bridge that crosses the dramatic Capilano River gorge. Then head off to Vancouver Island to visit the province's capital, Victoria, and the scenic district of Tofino, which has a succession of spectacular beaches. Afterwards head inland to sample characterful towns and villages, especially the fertile Cowichan Valley, which is great for food and wine lovers. You will see more thriving vineyards and orchards

in the Okanagan Valley, midway between Vancouver and Alberta – its numerous lakes are a draw for holidaymakers both local and visiting. BC is perfect for active holidaymakers who make the most of its awe-inspiring locations by hiking, kayaking and in the long winter, skiing. It has one of the best ski resorts in the world, Whistler, where the quality of snow and facilities attract almost one million visitors each winter. Lastly, BC will not break the bank, with flights from the UK surprisingly cost-effective.





'DID YOU KNOW' FACTS & FCO ADVICE

British citizens don't usually need a visa to visit Canada for short periods, but if you're travelling by air you'll need to get an Electronic Travel Authorisation (eTA) in advance.

If you are travelling with children, and only one parent is present, you should carry a letter of consent from the non-travelling parent.

During the winter, highways are often closed in British Columbia and other Provinces because of snow storms and avalanches. Even when roads remain open during a storm, driving conditions may still be treacherous. Take care, follow any local restrictions or guidelines, and make sure your vehicle has snow tyres and emergency supplies.



To contact the emergency services, call 911.



Visit www.gov.uk/foreigntravel-advice/canada for more information.



A cultural powerhouse, unforgettable cities, the magic of Bavarian castles and winter markets

Germany has shot up the list of UK holidaymakers' favourite overseas destinations and, after entering the top 10 in 2017, it is set to make even more progress in 2018.

Berlin is incredibly popular with those looking for fantastic nightlife, but it has so much more to offer with world-class art galleries and concert halls, beautifully restored buildings and stunning parks. UK holidaymakers are also now branching out to dynamic and fascinating cities such as Cologne, Munich, Frankfurt and Hamburg. The Munich Oktoberfest is one of the great, and best-known, celebrations on the continent but the Stuttgart Cannstatter Volksfest, Europe's biggest funfair, gives it a close run for its money, without the crowds of tourists. Head east for two beautiful cities: Dresden, which competes with Vienna in terms of culture and picturesque landscapes, and Leipzig, where composer Johan Sebastian Bach spent many years and created his most

sublime music. More magical treats await in the fairy tale castles of Bavaria, with the picture perfect Neuschwanstein Castle a stand out. Christmas markets are a seasonal feature in many German towns, and are fantastic for a family weekend away. For a taste of where the Germans holiday, head to the charming villages along the Baltic coast in the North. Finally, Germany is known for having some of the best sausages and beer in the world, however its wine - in particular, its Riesling - is also becoming increasingly popular with wine enthusiasts everywhere. Surprisingly, it is also fast becoming the vegan capital of the world, with an increasing number of Germans now opting for a plant-based diet.









'DID YOU KNOW' FACTS & FCO ADVICE

You should get a free European
Health Insurance Card (EHIC)
before you travel. If you already have an
EHIC, make sure it hasn't expired.

Crime levels are broadly similar to the UK. Take sensible precautions and be particularly vigilant at airports, railway stations and crowded public gatherings.

You don't have to carry your passport with you while in Germany, but the police are currently carrying out more frequent ID checks. If you're asked to show your passport and you don't have it with you, the police may escort you to wherever your passport is being kept so that you can show it to them.

It's illegal to cross German pedestrian crossings when the red pedestrian light is on. You risk a fine and payment of all costs in the event of an accident.

To contact the emergency services call 112.

Visit www.gov.uk/foreign-traveladvice/germany for more information.

6,000 years of history and some of the best diving in the world

The island of Malta will be taking its place in the sun in 2018, with the historic capital Valetta having been granted European Capital of Culture status. The city will play host to a range of events such as the Malta Jazz Festival in July and the International Arts Festival throughout June and July. Valetta is situated on a spectacular natural harbour and has been a magnet for great powers throughout the centuries, all of whom have left their mark on this beautiful and imposing city.

Great Britain used Malta as a naval base for many years and the links between the two nations remain close. The island's inhabited history goes back thousands of years, and man-made structures include the Hypogeum, a fascinating multi-layered building where parts of the complex date back almost 6,000 years. The city of Mdina is timeless, with a beautiful mix of medieval and baroque architecture surrounded by ancient walls. The bustling town of Rabat is well worth

a visit due to its flourishing market, Roman villa, fine churches and monasteries. Malta is also blessed with diving sites that rank amongst the best in the world, and has some of the cleanest waters in the Mediterranean. Head off the beaten track to find a secluded cove or beach. Malta's tranquil, unspoilt neighbour Gozo is easy to fall in love with too, and is only a short ferry ride away.





'DID YOU KNOW' FACTS & FCO ADVICE

You should get a free European
Health Insurance Card (EHIC) before
you travel. If you already have an EHIC,
make sure it hasn't expired.

There have been instances of pick-pocketing on bus routes, especially the 12 and 13 routes between Valletta and St Julian's. Thieves are targeting crowded buses during the summer season. Be vigilant and keep sight of valuables at all times. Local police are aware of the problem and conducting investigations.

To contact the emergency services call 112.



Visit www.gov.uk/foreigntravel-advice/malta for more information.



A warm welcome in the land of the black mountain

The idyllic Adriatic country of Montenegro will be that much easier to visit in 2018 due to the introduction of direct flights from the UK. Montenegro combines spectacular mountain scenery and canyons with pretty towns, lively resorts and a stunning coastline.

Pine-cloaked hills run down to the coast to resorts such as Budva, with its elegant Venetian buildings and the relaxing and welcoming Petrovac. The Montenegrin people are proud of their history and cultural heritage; which includes well-preserved Roman remains, beautiful Orthodox and









Catholic churches and the most important pilgrimage site in the country, the spectacularly located Ostrog monastery. Nature lovers and thrill seekers are well served, with the Tara River and Nevidio canyons, and the magnificent Lake Skadar National Park. Hiking, mountain biking,

kayaking and white water rafting are all on offer as well as the chance to spot bears and wolves in the more remote parts of the country. Perhaps Montenegro's greatest draw is its people, intensely proud but also incredibly welcoming to guests to their delightful country.

'DID YOU KNOW' FACTS & FCO ADVICE

You must register with the local police in the town/city where you're staying within 24 hours of your arrival in Montenegro. Hotels or other commercial accommodation providers will do this for you.

Under Montenegrin law, you must carry a valid form of ID (such as a passport or driving licence) with you at all times, otherwise you may be fined.

A wide range of outdoor activities are on offer for tourists. Take precautions to prevent injuries and use

protective equipment and ensure you have the right insurance. Before signing up with paragliding instructors, for example, ask to see their training licence for tandem flights. Take particular care when hiking in the Montenegrin mountains.

To contact the emergency services, call 112 (general emergencies), 122 (police), 123 (fire department) and 124 (ambulance services).



Visit www.gov.uk/foreigntravel-advice/montenegro for more information.

Visit the "roof of the world" for a life-changing experience

This awe-inspiring mountain kingdom is home to eight of the 14 highest peaks in the world, including the highest, Sagarmatha, known worldwide as Mount Everest. The Nepalese are a resilient and welcoming people, and following rebuilding work after the devastating earthquakes of 2015, the country is once again very much open for business.

Most trips will start in the capital, Kathmandu, a bustling city with beautiful old buildings including Hindu and Buddhist sites reflecting the deeply spiritual nature of the country. Next stop, head to Pokhara which is set in an idyllic location and is a trekking start point for the Annapurna and Ghandruk circuits. Adrenaline junkies can also try paragliding, skydiving, zip lining, white water rafting and bungee jumping, all of which are on offer around Pokhara. Those with energy to spare can head for the ultimate challenge, the Himalayan Rush Triathlon, held in neighbouring

Begnas. Nepal is an extremely lush and green country, particularly its National Parks with its tropical and sub-tropical forests. The parks of Chitwan, Bardia, Shuklaphanta and Parsa Wildlife reserve are home to a stunning range of birds, mammals and reptiles, with Koshi Tappu Wildlife Reserve a particularly good place to spot some of the 440 bird species in the country. With the help of an experienced guide, you can also spot peacocks, bears, rhinos, musk deer and Langur monkeys as you travel through this amazing country.







'DID YOU KNOW' FACTS & FCO ADVICE

You'll need a visa to travel to Nepal.
You can apply by contacting the Embassy
of Nepal in London. Visas are also available
on arrival at Tribhuvan International Airport —
you'll need to fill in an application form,
provide a passport photograph and pay the fee.

Your passport must be valid for at least six months when you submit your visa application.

You must have a valid visa in your passport to leave Nepal. If your visa has expired you must get it extended at the Department of Immigration before your departure. Overstaying without authority is serious and you can be detained or refused permission to leave until a fine is paid.

Nepal is in a major earthquake zone.
Two major earthquakes in April and
May 2015 caused extensive damage to buildings and infrastructure across several districts.

In the event of an earthquake, damage to infrastructure and accessibility issues may affect the level of consular assistance the British Embassy is able to provide.

Travel during the monsoon season (June-September) can be hazardous. Monsoon rains cause flooding and landslides that can cut off some towns and villages for days at a time. Take care and check access routes before setting off.

A valid permit and Trekkers' Information Management System (TIMS) card are needed to enter Nepal's main trekking regions. If trekking, use a reputable agency, remain on established routes, and walk with at least one other person. Follow the advice given by local authorities and guides.

Check our travel advice for safety information on domestic road and

To contact the Tourist Police in
Kathmandu call 01 4700750 or the
Tourist Police headquarters on 01 4247041.

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

The land of the long white cloud and the seas of the Blue Planet

New Zealand regularly features as one of the countries that people would most like to visit, and is truly a paradise on earth, with diverse landscapes and its own unique flora and fauna.

Part of 2017's hugely popular 'Blue Planet II' TV programme was filmed off the coast of New Zealand, with incredible footage of bottlenose dolphins and false killer whales featured in the series. The country divides into two main islands, the North Island and the South Island. The North Island contains the largest cities of Auckland and Wellington, both vibrant and beautiful. It is also home to the main indigenous Maori cultural centres, particularly around the thermal springs of Rotorua. To get to the larger, but more sparsely populated South Island, take the ferry across the Cook Strait. The South Island is extremely diverse, starting with the wide fertile plains of Canterbury and the worldclass wineries of Marlborough. The imposing Mount Cook where Sir Edmund Hillary – the conqueror of Everest – learnt his trade, the majestic Franz Josef glacier and the stunning





Milford Sound in Fiordland, combine beautiful countryside with a Pacific island setting. The South is also home to the remaining temperate rain forest that once covered New Zealand and the iconic symbol of the country, the kiwi. Finally, visit the two towns that encapsulate just how much this small country packs such a large punch: the very "English" city of Christchurch, bravely re-building itself after two devastating earthquakes, and the home of adrenalin-pumping, extreme sports including the bungee jump, Queenstown.



'DID YOU KNOW' FACTS & FCO ADVICE

New Zealand is located in a seismic zone and is subject to earthquakes. There are also a number of active volcanoes in New Zealand. Follow the advice of the local authorities and emergency services in the event of any activity.

If you plan to take part in extreme sports, check that the company is well established in the industry and that your insurance covers you.

If you're visiting remote areas of New Zealand, make sure your journey

details are known to local authorities or friends/relatives before setting out. Weather conditions can quickly become treacherous, especially in winter.

If you travel to the Cook Islands or the Islands of Niue or Tokelau, check local customs and courtesies with local visitors' offices.



To contact the emergency services, call 111



Visit www.gov.uk/foreigntravel-advice/new-zealand for more information.

This African jewel offers so much more than gorillas in the mist

Rwanda has made great strides in recent years to develop its tourism industry in a sustainable way and, in 2017, President Paul Kagame received the World Tourism Award for visionary leadership. This beautiful country is famous for its mountain gorillas and no visit would be complete without a trip to see these gentle, majestic creatures in their Volcanoes National Park home.

Whilst here, hike up the Diane Fossey trail and visit the spectacular Musanze Caves. Then, little over a day's drive away you can go on safari in the Akagera National Park and head off on a Congo Nile trail, a bird lover's dream, with hundreds of indigenous species. Even though Rwanda is land-locked, Lake Kivu offers a variety of water sports and a beautiful relaxing beach. For those in search of lively nightlife and bars, the capital, Kigali, is the place to be. Rwanda is an extremely fertile country and it is dotted with verdant tea plantations, which make for a very relaxing visit. In the south of the country, Nyungwe National Park has thousands of square kilometres of unspoilt mountain rainforest, and is home to hundreds of chimpanzees and other primates, making it the perfect end to a trip to this African jewel.









'DID YOU KNOW' FACTS & FCO ADVICE

You need a visa to enter Rwanda. 30 day tourist visas are available on arrival for £20 or US\$30. You can also get a visa in advance online or from any Rwandan diplomatic mission.

Gorilla trekking is available as part of organised tours in the Parc National des Volcans (also known as Volcanoes National Park). The park authorities only permit gorilla trekking that is undertaken as part of an organised tour.

Roads from Kigali to all major towns are good, but you should avoid road travel after dark as roads are unlit and driving standards are poor.

Plastic bags have been banned for environmental reasons. Visible plastic bags will be confiscated on arrival at the airport.

The currency in Rwanda is the Rwandan franc. There are ATMs in Kigali, but not all of them accept foreign cards. Credit cards are increasingly accepted in bars and restaurants, but are not widely accepted in shops.

If you're travelling near the borders with Burundi or the Democratic Republic of the Congo, you should also check travel advice for these countries.

To contact the emergency services, call 112 for emergencies, 113 for traffic accidents, or 116 to report abuse by a police officer, including attempts at bribery.

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

Breathtaking beauty where mountains meet the sea

The Caribbean has always held a special place in the affections of UK holidaymakers, and in 2018 the incredible island of St Lucia will be leading the way with a year of festivals. This island divides into two with the beautiful Rodney Bay in the north and the gorgeous Soufrière in the south.

St Lucia has always been a magnet for honeymooners, drawn to its luxury and boutique hotels. The island is striking, with volcanoes, towering waterfalls, thermal pools and the iconic Pitons – two mountainous, volcanic peaks that drop into the sea, which were recently recognised as a UNESCO World Heritage site. There are festivals throughout the year, with the Soleil Summer Festival in

May which offers food and rum, jazz, roots and soul music, and the must see event Carnival, which runs throughout June and July. The waters around St Lucia are perfect for snorkelling and spotting coloured parrotfish, seahorses and leatherback turtles, which come to lay their eggs on Grand Anse Beach. They also offer one of nature's rarest spectacles once a year, where a handful of divers can

witness colonies of coral reefs burst into action at a mass coral-spawning event, as featured in TV programme 'Blue Planet II'. Food on the island is delicious, featuring the freshest seafood and local ingredients such as coconut, papaya and the local favourite, cod fishcakes with a banana sauce. Chocolatelovers can also tour one of the island's cocoa plantations.









'DID YOU KNOW' FACTS & FCO ADVICE

British passport holders don't need a visa to visit St Lucia. On entry, you'll be granted a specified period to stay.

Medical treatment in St Lucia can be expensive. Make sure you have adequate travel health insurance and accessible funds to cover the cost of any medical treatment and repatriation.

Take care when walking alone off the busy main roads and avoid isolated areas, including beaches, particularly after dark.

Driving in St Lucia is on the left.

To drive on the island you must get

a local temporary driving licence. Car hire companies will usually help with this.

Taxis aren't metered and standard fares exist for most destinations. Agree the fare in the local currency (Eastern Caribbean dollars) with the driver before you set off. You can often pay in US dollars as an alternative.

The hurricane season in the Caribbean normally runs from June to November.

To contact the emergency services, call 999 (police) or 911 (ambulance services or fire department).

Visit www.gov.uk/foreign-traveladvice/st-lucia for more information.

Outstanding design, vibrant cities and picturesque countryside in the

real winter wonderland

Want to visit the No.1 nation for Health & Wellbeing? Then head off to Sweden, which took the top spot in the latest "Good Country Index", based on data from bodies such as the United Nations and the World Bank.

Sweden is renowned for its liberal outlook and civilised ways, epitomised by the national virtue of "lagom" – everything in moderation.

Sweden's capital city, Stockholm, has a wonderful waterside location and beautiful design, from the buildings to the furniture.

However, one of Sweden's main draws has to be its countryside, which is diverse and unspoilt. In the summer, head south to the countryside which will be very familiar to fans of TV series Wallander, with its idyllic wide plains dotted with pretty cottages and

bordered by sandy beaches. Take the ferry to the island of Gotland and the UNESCO World Heritage site of Visby. In the winter, head northwards and visit the Aurora Sky Station in the Abisko National Park, the perfect place to catch the spectacular Northern Lights. Spend some time with the Sami and their reindeer herds in Lapland and, for a truly magical experience, book into the Icehotel in the town of Jukkasjärvi, 200km north of the Arctic Circle.





'DID YOU KNOW' FACTS & FCO ADVICE

You should get a free European
Health Insurance Card (EHIC) before
you travel. If you already have an EHIC,
make sure it hasn't expired.

The currency for Sweden is Swedish Krona, not the euro.

Border controls are in place in Sweden for people travelling from Denmark via the Öresund crossing and arriving on ferries from Denmark and Germany. Make sure you carry a passport or national ID card when entering Sweden.

It is a legal requirement for all vehicles to have either studded tyres or un-studded friction tyres from 1 December to 31 March and when weather conditions are wintry.

To contact the emergency services, call 112.

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



Discover a land of history, culture, beautiful beaches and wonderful cuisine

Turkey is bouncing back after some challenging years, offering great value for money holidays in picturesque resorts.

It's a destination that has it all - history, culture, beautiful dramatic countryside, and lovely beaches. So many cultures have left their mark on Turkey over the years, leaving behind hundreds of world-class buildings and not just in world-famous Istanbul. Further south, the Greco-Roman city of Ephesus is incredibly well preserved and it is the closest you can get in the Mediterranean to what life was like in classical times. For most visitors, the main draw remains Turkey's beaches and their high quality hotels. These are concentrated in the areas of Antalya, Fethiye, Side, Dalaman, Bodrum and Izmir. Spend some time at sea too, sailing through the Aegean on a traditional Gulet, mooring in deserted coves and dining on freshly caught fish prepared by the crew. Activity lovers should head inland

for a spot of white water rafting or one of the country's most iconic sights, ballooning over the distinctive landscape of Cappadocia. Turkish food is one of the world's great cuisines and vegetarians are very well catered for. The delicious fresh fish and meat, and locally grown fruit and vegetables make for a very healthy and varied Mediterranean diet.









'DID YOU KNOW' FACTS & FCO ADVICE

You'll need a visa to travel to Turkey, except if you're a British Citizen passport holder arriving as a cruise ship passenger for a visit of up to 72 hours. You can get an e-Visa before you travel. If you don't have an e-Visa you can still get a visa on arrival for £20 in cash, although this service is due to be phased out.

In some busy areas, especially Istanbul, the Turkish authorities are stopping members of the public to conduct

ID checks. There's also a larger than usual number of police checkpoints on main roads across Turkey. You should co-operate with

officials conducting checks, and keep your passport and a printed copy of your e-Visa or your residence permit with you at all times.

At the time of publication, the FCO advise against all but essential travel to some areas in south-east Turkey. Check their travel advice for the latest information.

To contact the emergency services, call 155 for police for 112 for ambulance.

Visit www.gov.uk/foreign-traveladvice/turkey for more information.

FCO GENERAL TRAVEL ADVICE

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). If you're travelling with medication, check if there are any restrictions in place. Contact the embassy or consular office of the country you're travelling to if you need more information.

Check your passport is valid for you full trip (some countries require six 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.travelaware.campaign.gov.uk and keep up-to-date with the latest FCO travel advice by signing up to the FCO's Facebook and Twitter feeds: www.facebook.com/fcotravel or www.twitter.com/fcotravel.



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
- X Give you legal advice or translate documents
- X 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
- X Pay any bills or give you money
- X Make travel arrangements for you
- **X** Assist people affected by parental child abduction.

OBSERVATIONS FROM THE FCO

In 2016/17 the Foreign and Commonwealth Office (FCO) supported over 23,000 British nationals who needed serious assistance abroad and issued more than 23,000 emergency travel documents to help British people travel back to the UK. The FCO also led the UK government response to 26 crises from April 2016 to March 2017, and played a critical role in supporting British nationals in crisis situations since then.



Travel Aware is the FCO's flagship consular prevention campaign. The campaign aims to reach the British

travelling public with advice and tipson how to travel safely, and avoid the need for consular assistance and a ruined holiday.

The FCO and ABTA have continued to work together to provide British nationals with information on how to stay safe and healthy abroad. In 2017, this has included activity tackling a range of issues, including the

importance of being appropriately insured for travel, safety on winter sports holidays, youth campaigns, and increasing awareness of the FCO's country-specific travel advice.

Supporting British nationals abroad

Between 1 April 2016 and 31 March 2017 FCO staff handled 23,311 consular assistance cases around the world. This represents a slight decrease on the year before, despite another year on year increase in the number of British nationals travelling abroad. It continues to underline the importance of travelling aware and understanding how the FCO can help those who get into difficulty overseas. In 2016 British nationals made over 70 million trips overseas, according to the Office for National Statistics.

Among the 23,311 cases FCO staff handled were 4,019 deaths, 3,592 hospitalisations and 5,491 arrests. The highest number of assistance cases were reported in Spain, the USA, Thailand

and Greece, all of which are countries with high volumes of British visitors.

Passports and travel documents

In 2018, activity to increase the number of people travelling with appropriate insurance will continue to be a priority for the FCO. This will build on the strong, cross-industry, collaborative work started in 2017, with the support of ABTA, including a full review of guidance on GOV.UK¹.

Be on the Ball² will be relaunched to support football fans travelling to the FIFA World Cup in Russia in June 2018. We will continue to support British nationals resident in the European Union as the UK continues the process of exiting the EU.

¹www.gov.uk/guidance/foreign-travel-insurance ²www.gov.uk/guidance/be-on-the-ball-worldcup-2018

DID YOU KNOW...



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

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

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

♦ ♦ ♦ ♦ ♦ ABTA was voted a Consumer Superbrand in 2017 ♦ ♦ ♦ ♦ ♦

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 2,000 consumers using an online research methodology and related to holiday booking habits in the 12 months to August 2017. Fieldwork was conducted in August 2017.

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 has around 1,200 Members with a combined annual UK turnover of £37 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.

CONTACT US

ABTA Ltd

Post: 30 Park Street, London, SE1 9EQ Tel: +44 (0)20 3117 0500 Fax: +44 (0)20 3117 0581

Email: press@abta.co.uk Web: abta.com Twitter: @ABTAtravel

