



#### CURRENT MARKET

#### Do not travel abroad unless it's essential

The FCO <u>advised British people against all non-essential travel worldwide</u>. This <u>applies for an indefinite period</u> due to unprecedented international border closures and other restrictions. All countries may restrict travel without notice.

To change or cancel your travel plans, follow these steps:

- 1. contact your airline, travel company, cruise line or other transport and accommodation providers
- 2. get in touch with your insurance provider

News

## British Airways makes 921,000 cash refunds for cancelled flights

15 May 2020 by Mark Caswell

## No hotel buffets when holidays resume, says tour operator Tui

Food will be served by masked staff after coronavirus travel restrictions lifted

#### Plan to avoid quarantine and save holidays abroad

Could foreign holidays this year yet be saved? Britons might be able to travel abroad this summer after the Government announced plans to create "air bridges" with other nations. It would mean that holidaymakers would be able to travel to some foreign resorts and return to Britain without entering quarantine. For those arriving from countries where an agreement is not in place, the Government is this week expected to announce a 14-day quarantine period - with fines of up to £10,000. Home



### UK holiday parks and attractions gear up to open for summer

Strict new rules on social distancing to combat Covid-19 will be in place at tourist sites

Seychelles bans cruise ships through 2021 to prevent Covid-19 spread

Lilit Marcus, CNN + Undated 19th May 202



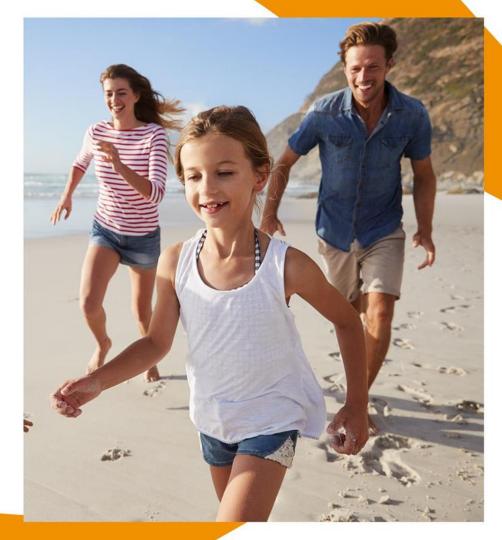


#### METHODOLOGY

TI Media carried out a travel research during the coronavirus pandemic in order to gauge consumer sentiment and future holiday plans.

We're looking at how and when consumers like to travel and why, where they like to go, what's important to them when booking, and what they will spend their money on.

Total Sample: Nationally representative sample of 300 respondents. Compared to our 2019 travel study (when direct comparison available).





# ANSWERING TRAVEL QUESTIONS

- 1. HOW ARE WE **FEELING**?
- 2. WHY & WITH WHO WILL WE TRAVEL?
  - 3. WHEN?
  - 4. WHERE & HOW?
  - 5. WHAT TYPE & FOR HOW MUCH?
    - 6. ANY REASSURANCES?
      - 7. WHAT WE'LL DO?



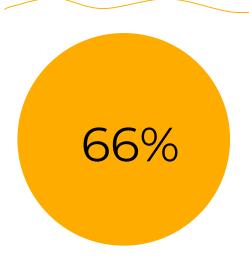


#### **KEY FINDINGS**

- CONSUMERS ARE FEELING WORRIED BUT OPTIMISTIC
- TRAVELLING BY CAR MORE, LESS BY BUSES AND PLANES
- HOLIDAYS IN THE UK (STAYCATION) CONSIDERATION MORE THAN DOUBLES
- STRESS RELIEF, HEALTH AND WELLBEING ARE MORE AND MORE IMPORTANT. MANY WILL TRAVEL TO RECONNECT WITH THEIR PASSIONS
- 2020 HOLIDAYS WILL BE A WAY TO SOCIALISE WITH FAMILY AND FRIENDS
- BEACH QUALITY AND FOOD OFFER REMAIN TOP DESTINATION CHOICE
  FACTORS
  - SCHOOL HOLIDAYS TIMING REMAINS CRUCIAL
  - PEOPLE WILL LOOK TO BOOK THE HOLIDAYS AND TRAVEL ALMOST IMMEDIATELY AFTER THE BOOKING IS MADE.
    - HOLIDAY MONEY IS ALREADY SET ASIDE
    - HYGIENE LEVEL OF THE VENUE / HOTEL WILL BE EXTREMELY
       IMPORTANT
  - 8 IN 10 ARE INTERESTED IN AN OPTION CALLED "CORONAVIRUS GUARANTEE".



#### **HOLIDAY LONGING**

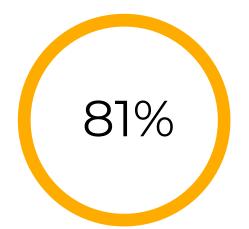


agree that if they didn't go on a holiday one year they would really miss it.

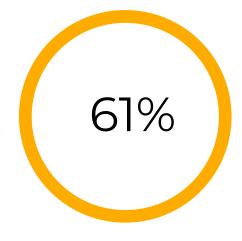
2019 agreement: 75%



#### THINKING ABOUT HOLIDAYS DESPITE FEELING WORRIED



74%



is currently feeling worried about booking their holidays.

As comparison, when Brexit happened, 48% said that they are worried about their travel bookings. will delay the holiday booking for next year until they know the impact Covid-19 will have.

When Brexit happened, 46% of people in the UK decided to do the same.

is already thinking about their next holiday and travel plans.

Only 39% said that they are not thinking about it yet.



#### 1 IN 3 WILL OR HAVE CANCELLED

31% doesn't have anything booked yet, 26% will reschedule and 9% is not sure what to do yet.

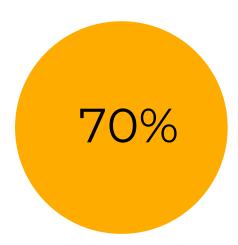
#### WHAT ARE YOU GOING TO DO ABOUT YOUR 2020 HOLIDAYS BOOKING?



Source: Travel survey, TI Media 'The Lens', May 2020 | Travel survey, , TI Media 'The Lens', May 2019,



#### NOT SURE ABOUT AIR TRAVEL

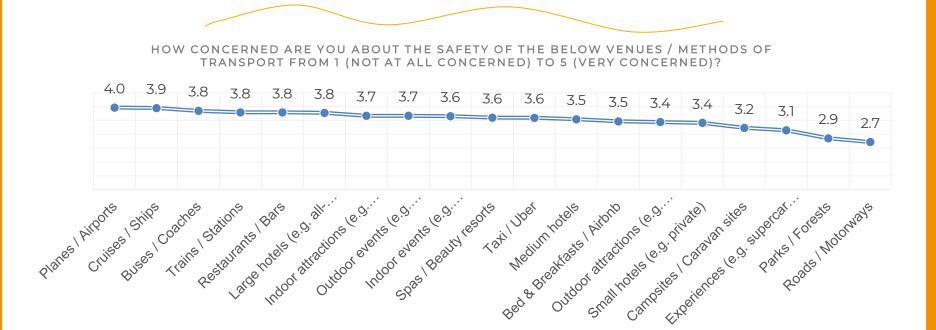


will be worried about flying in a crowded plane even after the pandemic is over.

Source: Travel survey, TI Media 'The Lens', May 2020 | Travel survey, , TI Media 'The Lens', May 2019,

#### TRAVELLING CONSIDERED LESS SAFE THAN STAYING AT THE DESTINATION / VENUE

METHODS OF TRASPORTATION INCLUDING PLANES, CRUISES, BUSES AND TRAINS ARE CONSIDERED LESS SAFE THAN HOTELS OR RESTAURANTS.



#### **GETTING AWAY TO RELAX (SAFELY)**



An adventure, a break from every day life and some new experiences

Going to Greece as soon as possible to replace our holiday which presumably we won't be able to go on this year.

Looking for two to three weeks away on a beach resort preferably all inclusive to take away the despair of the last few months

I can't wait to have some time away with my family to relax and escape these 4 walls.



Peace and quiet. but want security as well especially at the moment

Hoping to get away even if it is somewhere close by. Just want to get out of my flat and my area.

> I am looking to go to a sunny place where covid has not impacted

I think I will wait
several months until
the corona virus is
under control. I will
probably look to
book a hotel that has
good hygiene
reputation, room
standards and good
food preparation



#### ENVIRONMENT IS KEPT ON TOP OF TRAVELLERS' MINDS



6 in 10

will be more mindful of the environment when booking their holiday for 2020 / 2021.

(2020: 56% vs 2019: 62%)



5

in 10

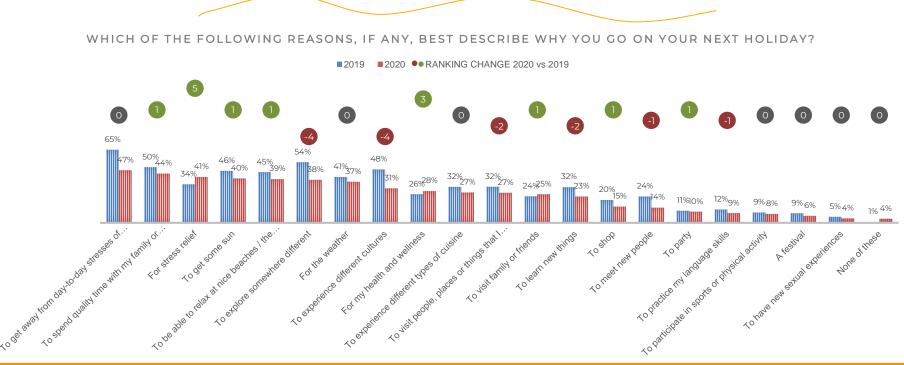
is interested in eco-friendly tourism.

(2020: 50% vs 2019: 51%)



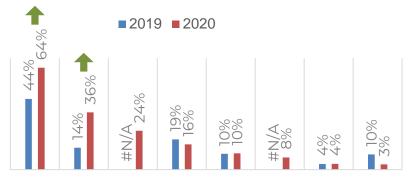
#### STRESS RELIEF, HEALTH AND WELLBEING ARE GAINING IMPORTANCE

EXPLORATION OF UNKNOWN LOCATIONS AND EXPERIENCING DIFFERENT CULTURES IS LESS IMPORTANT TO THE BRITISH PEOPLE NOW WHEN IT COMES TO THEIR HOLIDAY REASONS

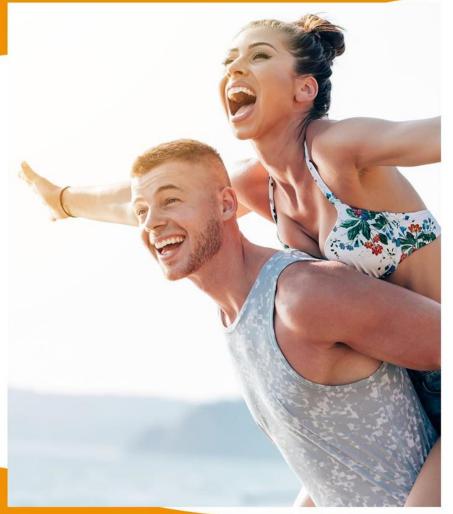


# 2020 HOLIDAYS WILL BE A WAY TO SOCIALISE WITH FAMILY AND FRIENDS

WHO WOULD YOU GO ON YOUR NEXT HOLIDAY WITH? PLEASE SELECT ALL THAT APPLY.



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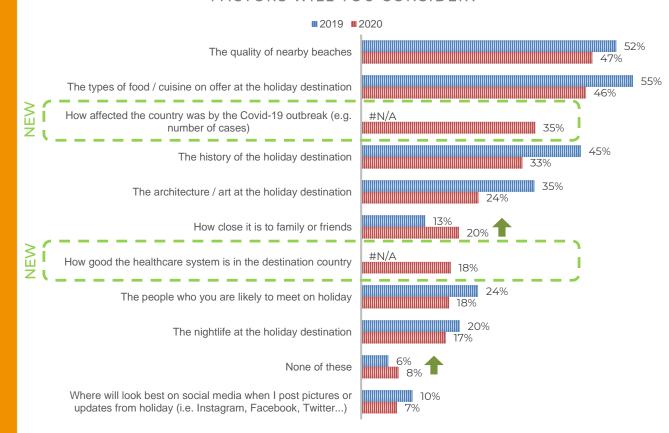
# TRAVEL INSPIRATION IS CURRENTLY LOWER THAN IN 2019, BUT **VIDEO**CONTENT AND GOOD DEALS INCREASE IMPORTANCE



WHEN YOU THINK ABOUT YOUR NEXT HOLIDAY, WHICH OF THE FOLLOWING THINGS WILL YOU USE TO GET INSPIRATION ABOUT WHERE TO GO?



## WHEN YOU WILL BE THINKING OF, OR PLANNING, A HOLIDAY DESTINATION, WHICH OF THE FOLLOWING FACTORS WILL YOU CONSIDER?



#### BEACH QUALITY AND FOOD OFFER REMAIN TOP DESTINATION CHOICE FACTORS

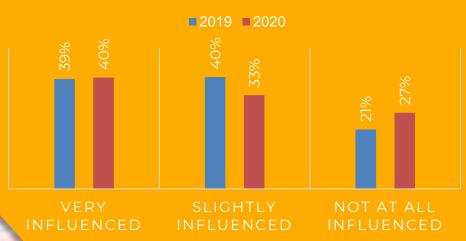


THE LEVEL AND SIZE OF COVID-19 OUTBREAK WILL BE VERY IMPORTANT TO THE HOLIDAYMAKERS WHEN CHOOSING THEIR TRAVEL DESTINATION.

FAMILY AND FRIENDS LOCATION HAS INCREASED ITS IMPORTANCE.



# HOW INFLUENCED ARE YOU BY THE TIME OF YEAR YOU TAKE YOUR NEXT HOLIDAY? (E.G. SCHOOL HOLIDAYS ETC)

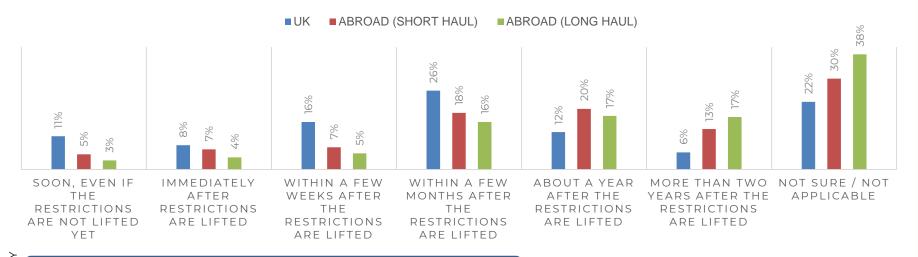


# SCHOOL HOLIDAYS TIMING REMAINS CRUCIAL

73% WILL BE INFLUENCED BY THE TIME OF YEAR WHEN TAKING THEIR NEXT HOLIDAY (2019: 79%).

## MAJORITY OF PEOPLE WILL BOOK **UK HOLIDAYS** WITHIN A FEW MONTHS AFTER THE RESTRICTIONS ARE LIFTED. **LONG HAUL** HOLIDAYS WILL SEE LONGER BOOKING STAGNATION.

WHEN, IF AT ALL, ARE YOU PLANNING TO BOOK TRAVEL / HOLIDAYS GIVEN THE CURRENT CORONAVIRUS OUTBREAK?



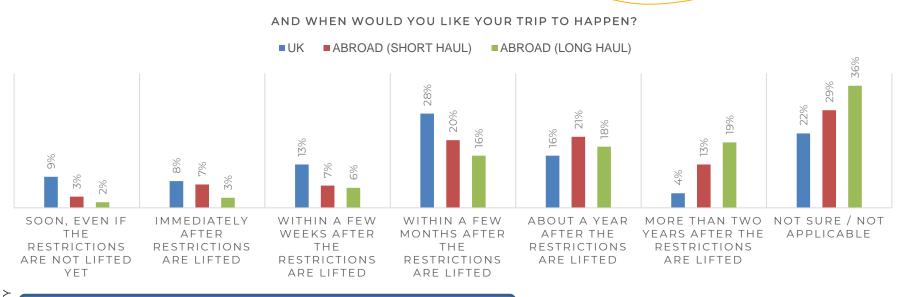
UK bookings reach 60%

ABROAD (SHORT HAUL) bookings reach 57%

ABROAD (LONG HAUL) bookings reach 62%

REACHING MAJORITY

## PEOPLE WILL LOOK TO BOOK THE HOLIDAYS AND **TRAVEL ALMOST IMMEDIATELY** AFTER THE BOOKING IS MADE.

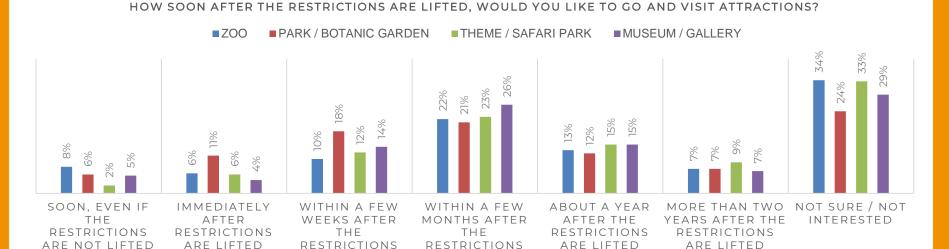


UK bookings reach 58%

ABROAD (short HAUL) bookings reach 58%

ABROAD (LONG HAUL) bookings reach 65%

#### VISITING PARKS AND BOTANIC GARDENS WILL HAPPEN FIRST, FOLLOWED CLOSELY BY OTHER ATTRACTIONS



ARE LIFTED

ARE LIFTED

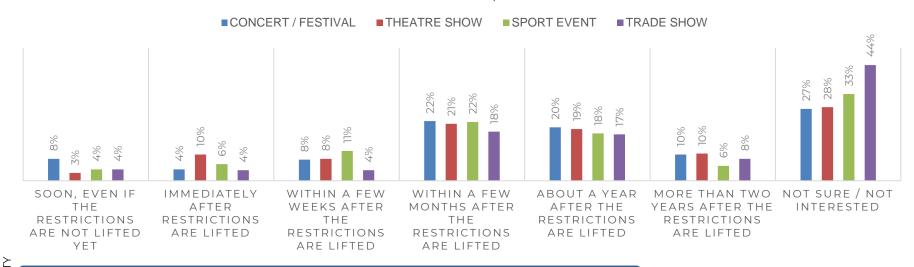


ARE LIFTED

ARE NOT LIFTED

## MOST **EVENTS** WILL SEE A RETURN OF ATTENDEES **WITHIN A YEAR** FROM THE MOMENT RESTRICTIONS ARE LIFTED







THEATRE SHOW reaches 58%

SPORT EVENT reaches 62%

TRADE SHOW reaches 56%

#### UK HOLIDAYS AND OUTDOOR ACTIVITIES ARE THE MOST ATTRACTIVE

GOING ON **UK HOLIDAYS**, VISITING **PARK / GARDEN** AND GOING TO THE **ZOO**ARE GOING TO BE THE SOONEST THINGS DONE AFTER THE LOCKDOWN
RESTRICTIONS ARE LIFTED



## SUMMARY - THINGS TO DO - TIME SCORE (THE LOWER SCORE, THE SOONER PEOPLE ARE GOING TO DO IT)



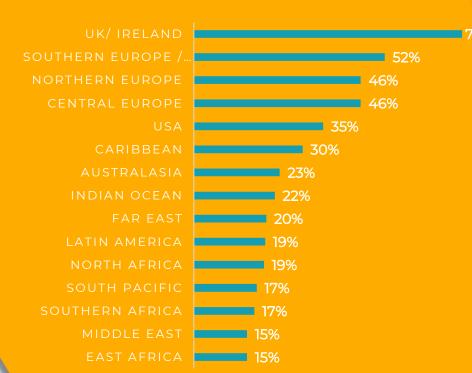




MORE PEOPLE ARE NOW CONSIDERING BUYING A HOLIDAY HOME IN THE UK, WHILE THE ABROAD OPTION IS LESS LIKELY TO ATTRACT NEW CUSTOMERS AT THE MOMENT.

# WHICH PART(S) OF THE WORLD WOULD YOU CONSIDER FOR YOUR NEXT HOLIDAY?

(DEFINITELY YES + PROBABLY YES)



UK HOLIDAYS
CONSIDERATION
MORE THAN
DOUBLES

2019:

33%

3 IN 4 PLAN TO GO ON A HOLIDAY IN THE UK AS THEIR NEXT TRIP.

ABOUT HALF ALSO CONSIDERS EUROPE.



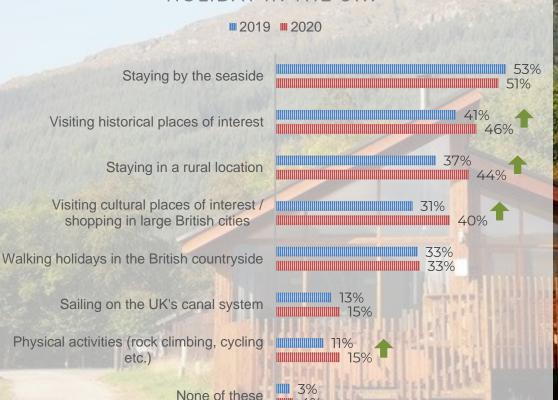




UK REGIONS DEVON AREA, SCOTTISH AND WELSH DESTINATIONIONS ARE NOW CONSIDERED MORE THAN BEFORE BY THE BRITISH PEOPLE.

CORNWALL, TOWNS AND CITIES (INCL. LONDON) ARE LESS POPULAR WHEN COMPARED TO 2019.

# WHICH OF THE FOLLOWING BEST DESCRIBE YOUR FAVOURITE TYPES OF HOLIDAY IN THE UK?

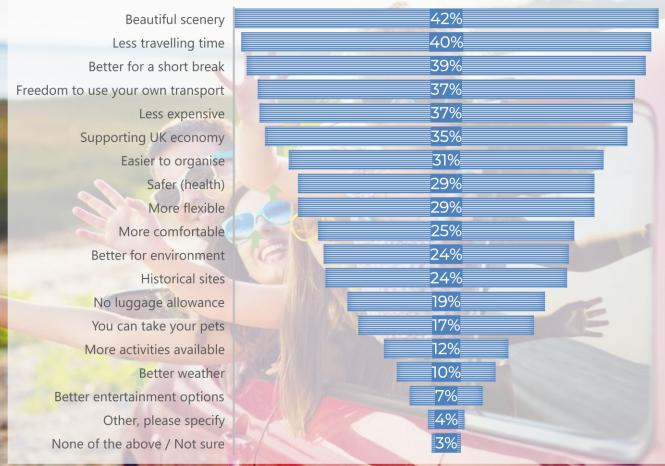


INCREASED
INTEREST IN
VARIOUS UK
HOLIDAY TYPES

SEASIDE CONTINUES TO BE NUMBER 1 UK HOLIDAY TYPE, BUT OTHER OPTIONS (INCL. HISTORICAL AND RURAL LOCATIONS) ARE GROWING THEIR POPULARITY. UK HOLIDAY
CHOICE IS
SUPPORTED BY
MANY REASONS

BEAUTIFUL SCENERY IS
THE TOP REASON, BUT
IT'S STRONGLY
SUPPORTED BY
FLEXIBILITY WHEN IT
COMES TO TRAVELLING
METHOD AND
JOURNEY TIME,
TOGETHER WITH
LOWER PRICE AND
SUPPORTING UK
ECONOMY.

## WHAT REASON(S) DO YOU HAVE FOR CONSIDERING HOLIDAYS IN THE UK?



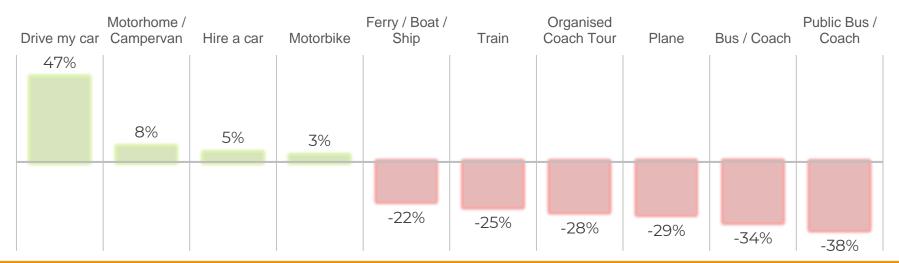
#### RAPID CONSIDERATION INCREASE IN TRAVELLING BY OWN CAR

TRAVELLING BY **OWN CAR** IS NOW CONSIDERED MUCH MORE THAN IN THE PAST.

BUSES AND COACHES ARE SEEING A HIGH DECREASE IN THE CONSUMER CONSIDERATION.

WOULD YOU CONSIDER THE BELOW METHODS OF TRANSPORT FOR YOUR NEXT HOLIDAYS MORE OR LESS THAN IN THE PAST?

(NET)





## SELF-CATERING OVERTAKING ALL-INCLUSIVE TYPE OF HOLIDAYS

### WHAT TYPE(S) OF HOLIDAY WOULD YOU PREFER TO TAKE AFTER THE AFTER RESTRICTIONS ARE LIFTED?





## WHICH OF THE FOLLOWING BEST DESCRIBE THE TYPE OF HOLIDAYS THAT YOU PREFER TO BOOK FOR YOUR NEXT TRIP?

**2019 2020** 

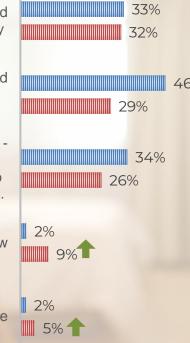
I prefer to buy my travel and accommodation separately

I prefer to buy a package - travel and accommodation all included in the cost

It depends on what the best price is if it's cheaper to buy travel and
accommodation separately I will do
that, if a package is cheaper, I'll...

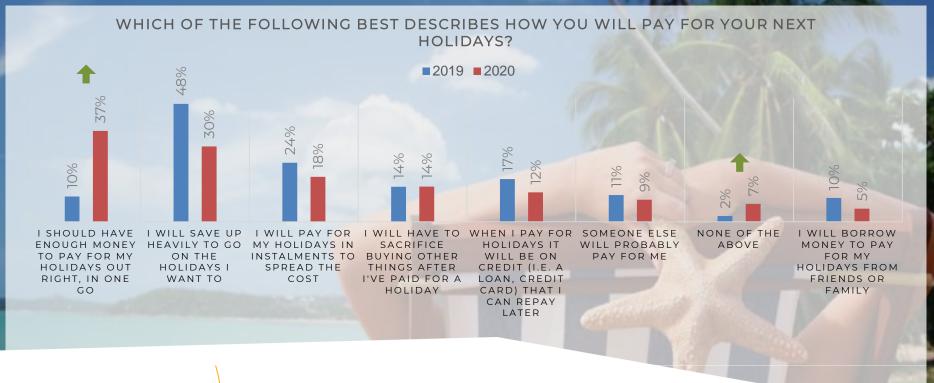
I don't know

None of these



HOLIDAY
PACKAGES
IN DECLINE

BUYING ACCOMODATION AND TRAVEL SEPARATELY BECAME NUMBER 1 OPTION FOR THE BRITISH HOLIDAYMAKERS (FROM NUMBER 3 IN 2019).



PAYING IN ONE GO

SAVING UP HEAVILY IS NO LONGER THE MOST POPULAR HOLIDAY PAYMENT OPTION.

BRITISH PEOPLE ESTIMATE THAT THEY WILL HAVE ENOUGH MONEY TO PAY FOR THEIR HOLIDAYS IN ONE GO – ALMOST 4 x TIMES MORE SAY SO WHEN COMPARED TO LAST YEAR.

### SPEND EXPECTATION FOR THE ABROAD HOLIDAYS IS HIGHER





BRITISH PEOPLE ARE PLANNING TO SPEND ABOUT HALF OF THEIR 2019 HOLIDAY BUDGET FOR 2020 UK TRIP.

HOWEVER, IF THEY'RE PLANNING HOLIDAYS ABROAD, THEY'RE GOING TO SPEND +£300 MORE THIS YEAR ON AVERAGE.

### UK HOLIDAYS MUCH SHORTER BUT NOT MUCH CHEAPER

How many days do you think your UK and/or abroad holidays would last?



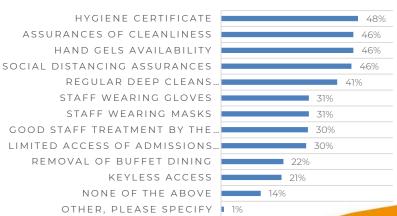
UK HOLIDAY **DURATION** IS -43% LOWER THAN THE ABROAD ONE, BUT DAILY UK HOLIDAY **BUDGET** IS ONLY -26% LOWER.

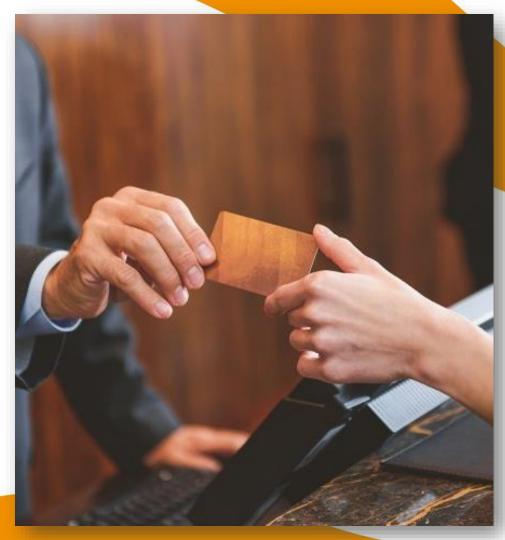


## REASSURANCES, FEATURES AND GUARANTEES

# VARIOUS REASSURANCES ABOUT CLEANLINESS AND HYGIENE ARE EQUALLY IMPORTANT TO THE BRITISH HOLIDAYMAKERS

WHAT KIND OF REASSURANCE(S) / FEATURE(S)
WILL YOU LOOK FOR IN A HOTEL OR HOLIDAY
DESTINATION (UK OR ABROAD)?







### HYGIENE MOST IMPORTANT

HIGH HYGIENE AND CLEANLINESS LEVEL IS CHOSEN AS NUMBER 1 BY 54% OF PEOPLE.

IT'S MORE IMPORTANT THAN LOW PRICE AND BOOKING FLEXIBILITY.

High hygiene / cleanliness Low price level /Good

value for money

Booking / refund flexibility

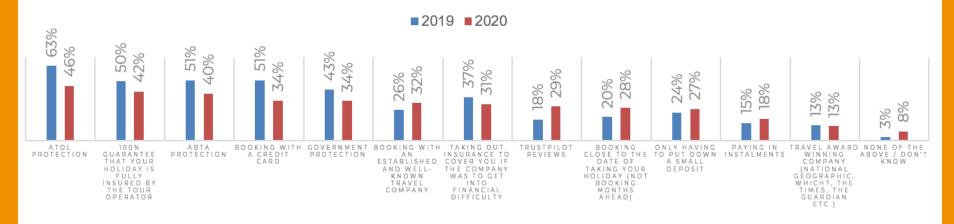
Source: Travel survey, TI Media 'The Lens', May 2020 | Travel survey, , TI Media 'The Lens', May 2019,

### BRAND TRUST, REVIEWS AND BOOKING FLEXIBILITY ARE MORE IMPORTANT

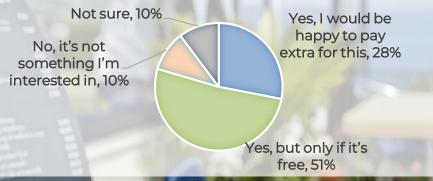
TOP TOUR OPERATOR ASSURANCES, LIKE ATOL, ABTA AND HOLIDAY INSURANCE REMAIN VERY IMPORTANT.

HOWEVER, **SECONDARY FACTORS** ARE NOW MORE RELEVANT IN THE EYES OF HOLIDAYMAKERS: ESTABLISHED **BRAND IMAGE**, TRUSTPILOT **REVIEWS**, **LAST MINUTE BOOKING** AVAILABILITY AND **SMALL DEPOSIT** OPTION ARE MORE LIKELY TO BE SOUGHT AFTER IN 2020 THAN 2019.





# SHOULD HOTELS, AIRLINES AND TOUR OPERATORS OFFER "CORONAVIRUS GUARANTEE" TO THEIR CUSTOMERS (E.G. EASY REFUNDS, FLEXIBLE TRAVEL DATES ETC.)?



### WHAT SITUATION(S) SHOULD A "CORONAVIRUS GUARANTEE" COVER?



CONTINUING

THREAT OF

CORONAVIRUS

TO THE

CORONAVIRUS

OUTBREAK

# "CORONAVIRUS GUARANTEE"

8 IN 10 ARE INTERESTED IN AN OPTION CALLED "CORONAVIRUS GUARANTEE".

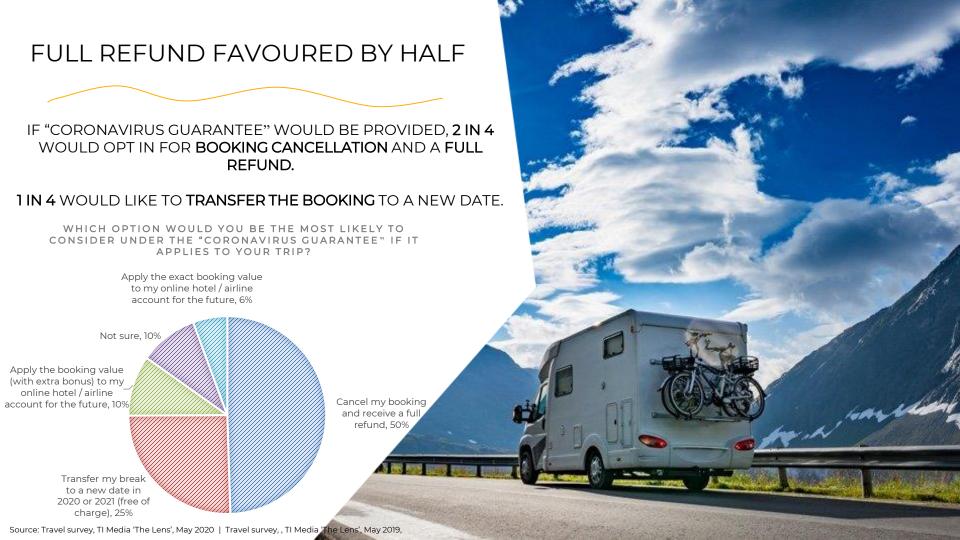
MAIN COVERAGE SHOULD
INCLUDE SITUATIONS
WHEN THE
GOVERNMENT IS
RESTRICTING
TRAVEL AND/OR
WHEN THE
HOTEL HAS TO
CLOSE DUE
TO THE
OUTBREAK.

Source: Travel survey, TI Media 'The Lens', May 2020 | Travel survey, TI Media 'The Lens', May 2019,

OUTBREAK

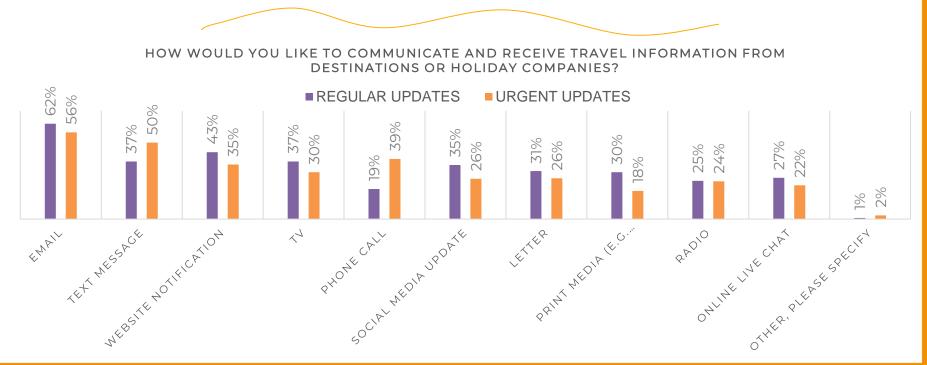
CORONAVIRUS

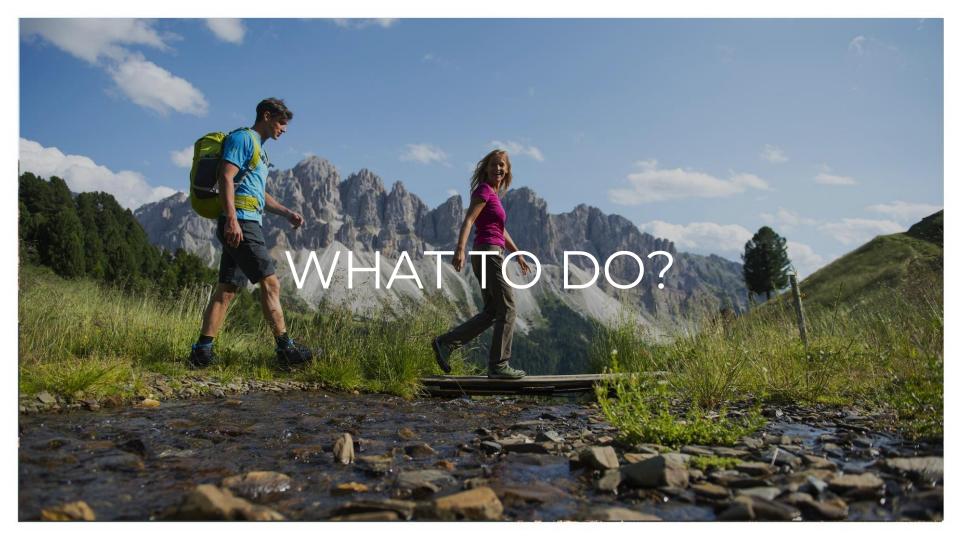
OUTBREAK



#### EMAIL IS THE BEST WAY TO COMMUNICATE UPDATES

WHILE **EMAIL** IS CONSIDERED TO BE BEST FOR BOTH REGULAR AND URGENT UPDATES, **TEXT MESSAGE** AND **PHONE CALL** IS ACCEPTED MORE OFTEN WHEN THE INFORMATION IS URGENT.







#### STAYCATION AND ACTIVITY HOLIDAY IN GROWTH

**SHORT CITY BREAKS** JUMP TO THE FIRST PLACE IN THIS HOLIDAY TYPE RANKING (UP FROM 5<sup>TH</sup>), WHILE **STAYCATION** GOES UP BY 10 PLACES.

**HOLIDAY VILLAGES** (E.G. CENTER PARCS) LOSE 12 PLACES. IT MIGHT BE DUE TO THEIR CONTINUOUS ANNOUCEMENTS OF EXTENDED CLOSURES.

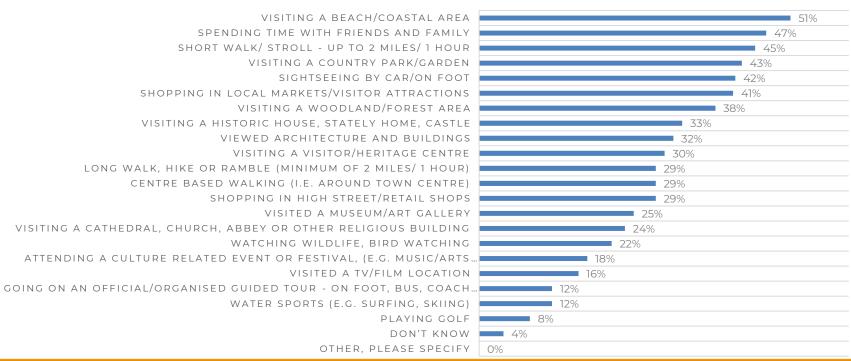
### WHAT TYPE(S) OF HOLIDAY WOULD YOU BE LOOKING TO HAVE AFTER COVID-19 RESTRICTIONS ARE LIFTED?



■2019 ■2020 ●● RANKING CHANGE 2020 vs 2019

#### **OUTDOOR ACTIVITIES** ARE DOMINATING THE HOLIDAY PLANS

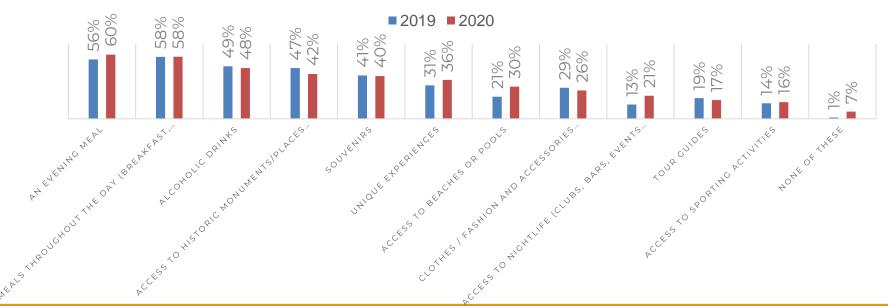
#### WHAT ACTIVITIES WOULD YOU LIKE TO DO DURING YOUR HOLIDAYS IN THE UK?

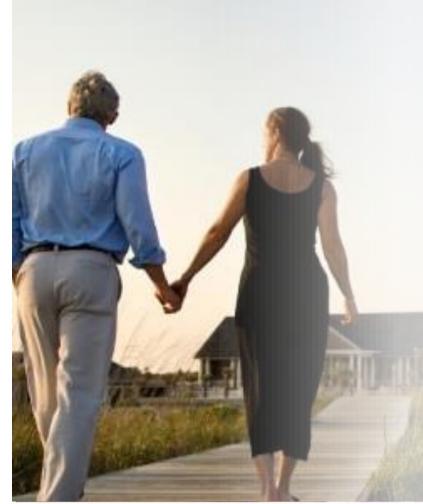


#### MONEY DURING HOLIDAYS WILL BE SPENT MAINLY ON MEALS

**FOOD** AND **BEVERAGE** WILL REMAIN THE TOP CATEGORIES WHEN IT COMES TO SPEANDING MONEY ON HOLIDAYS. SPENDING CONSIDERATION ON **EXPERIENCES** AND **ACCESS PASSES** (E.G. TO THE POOL OR BEACH) INCREASED.

WHICH OF THE FOLLOWING SORTS OF THINGS ARE MOST LIKELY TO SPEND MONEY
ON WHILST YOU ARE ON YOUR NEXT HOLIDAY?





### SO WHAT?

- AIM AT RELAXING & WELLBEING, NOT AT ADVENTURE
- DON'T FORGET THE PASSIONATE PEOPLE WITH HOBBIES
- VIDEO HOLIDAY CONENT IS MORE INSPIRING NOW THAN EVER
  - REVIEWS WILL BE NOTICED
  - ENABLE LAST MINUTE BOOKINGS
  - REMEMBER THE **GUARANTEES** & ASSURANCES
    - OFFER SHORTER TYPE OF HOLIDAYS
    - OUTDOOR ACTIVITIES ARE IN DEMEND
- **SELF CATERING** IS A WAY TO EAT. LARGE PROPORTION OF THE HOLIDAY MONEY WILL BE **SPENT ON FOOD** 
  - LOW DEPOSITS WANTED, BUT LESS CREDIT / LOAN OFFERS
     NEEDED
- CONNECT VIA EMAIL, AND, IF URGENT, CALL OR TEXT THE GUESTS

