



HOLIDAY HABITS 2022



INTRODUCTION

This is the first Holiday Habits report for three years. It assesses how people travelled between September 2021 and August 2022, which covers the first real opportunity people had to travel since global COVID-19 travel restrictions were introduced in early 2020.

Consumer demand for holidays has remained resilient throughout the pandemic, and this was unleashed as restrictions started to relax and lift, with 77% of people taking a holiday in the UK or abroad over the last 12 months. Of these trips, 39% of people said they took a holiday which was rolled over from during the pandemic, with 74% saying they took a trip which was a new booking.

The removal of UK travel restrictions in March 2022 saw people return to their beloved overseas holiday. As they say, absence makes the heart grow fonder, and over the last 12 months 45% of people took a trip abroad. This is a large proportion taking into account that travel from the UK was difficult, or sometimes near impossible, for the first six months of the period this report covers.

The travel industry is still very much at the beginning of its recovery. We're also operating in a complex political and economic climate. The nation is in the midst of a cost of living crisis, with high inflation, increasing interest rates and rising energy bills.

As we explore in the report, indications from our research show that people plan to prioritise spending on holidays over other non-essentials but many plan to make changes as to how they holiday. At the time of writing we are just weeks into a new Government which has just announced tax reforms and help with energy bills; time will tell on what this means in reality for consumers.

There is also the global threat of climate change and for the first time we reveal data on people's attitudes towards climate change and holidays, along with other sustainability issues. In the industry, there is a growing focus on this, with the sector working together to develop a more sustainable future.

There are challenges ahead but there are also reasons to be optimistic. This is also shown in our latest research on the value of outbound travel to the UK economy.

With the right framework, outbound travel is forecast to grow by 15% over the next five years¹ – outperforming most other parts of the UK economy.



Mark Tanzer
CHIEF EXECUTIVE

ABOUT THIS DATA

This report is based on research with a nationally representative sample of 2,000 people which we have conducted each summer since 2011. Each data set relates to people's holiday habits in the 12 months prior to that summer and what their travel plans are for the year ahead.

The latest research was carried out from 16 to 30 August 2022 and has captured how people travelled in the 12 months prior to that in total as well as in two six-month segments: September 2021 to February 2022 and March 2022 to August 2022. This has allowed us to track any changes since the removal of the UK's travel restrictions in March 2022, though it's

important to note that there was a range of restrictions still in place in many other destinations in that period.

In this report, any references to 'the last year' or 'the last 12 months' refer to September 2021 to August 2022, with 'next year' referring to the 12 months from September 2022.



ASSESSING THE INDUSTRY'S RECOVERY

This year we have seen the UK travel industry start to rebuild and recover from the restrictions in place during the COVID-19 pandemic, which effectively shut down international travel for two years, affecting three winter and two summer seasons. Overall, 77% of people went on a holiday in the last 12 months, with – unsurprisingly – a greater proportion of people going on a UK holiday, due to international travel restrictions still being in place for the first half of this period.

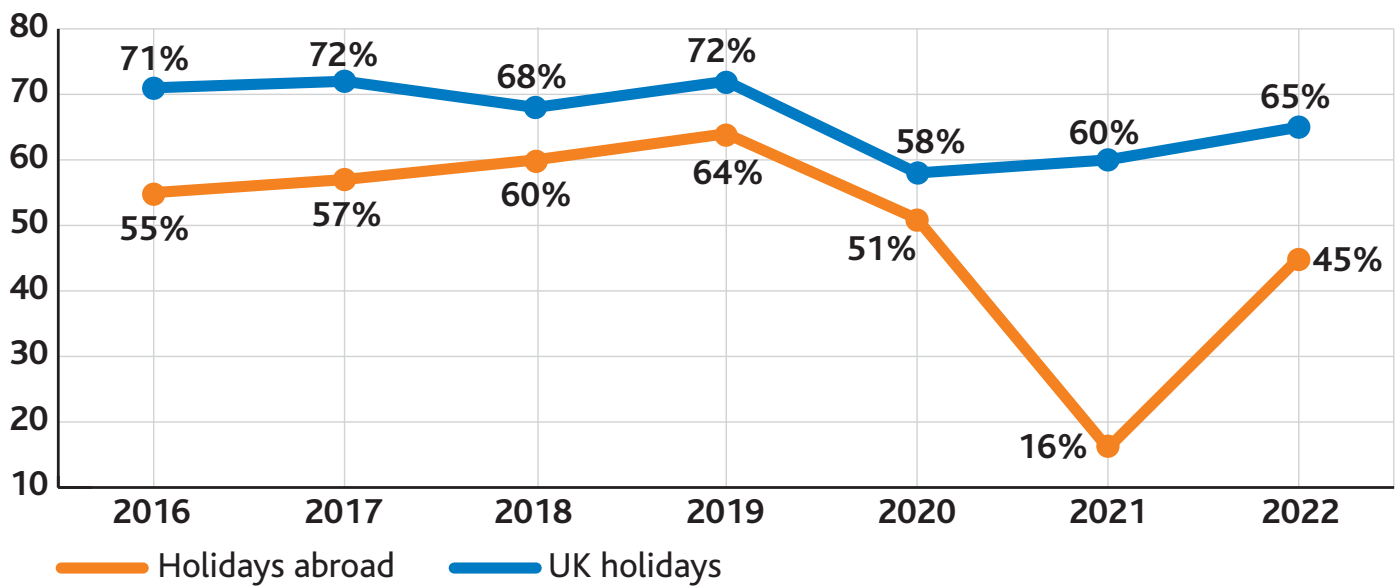
2022 was the first opportunity that people had to head abroad without a heavy burden of restrictions, with 45% of people travelling on a foreign holiday compared to 64% in 2019, which in itself was a bumper year for travel. That means that the number of people who went on an overseas holiday in the past 12 months equates to 70% of the people who

travelled abroad in 2019. Considering travel was heavily restricted for much of this time, it is quite a significant proportion and reflects the strong commitment people have to going abroad.

As soon as UK restrictions were lifted in March 2022, foreign travel started to return, with 38% of people going on an overseas holiday during that six-month period, up from just 21% during September 2021 to February 2022 when travel rules were still in place. We should recognise that while a fairly large percentage of people have been abroad, bearing in mind the circumstances, the number of foreign holidays taken is down from 1.9 in 2019, to 1.3 in 2022 due to the limited opportunity to travel. Restrictions were still in place in many overseas destinations in March, with requirements easing as we headed towards the summer, so the situation was far from normal.



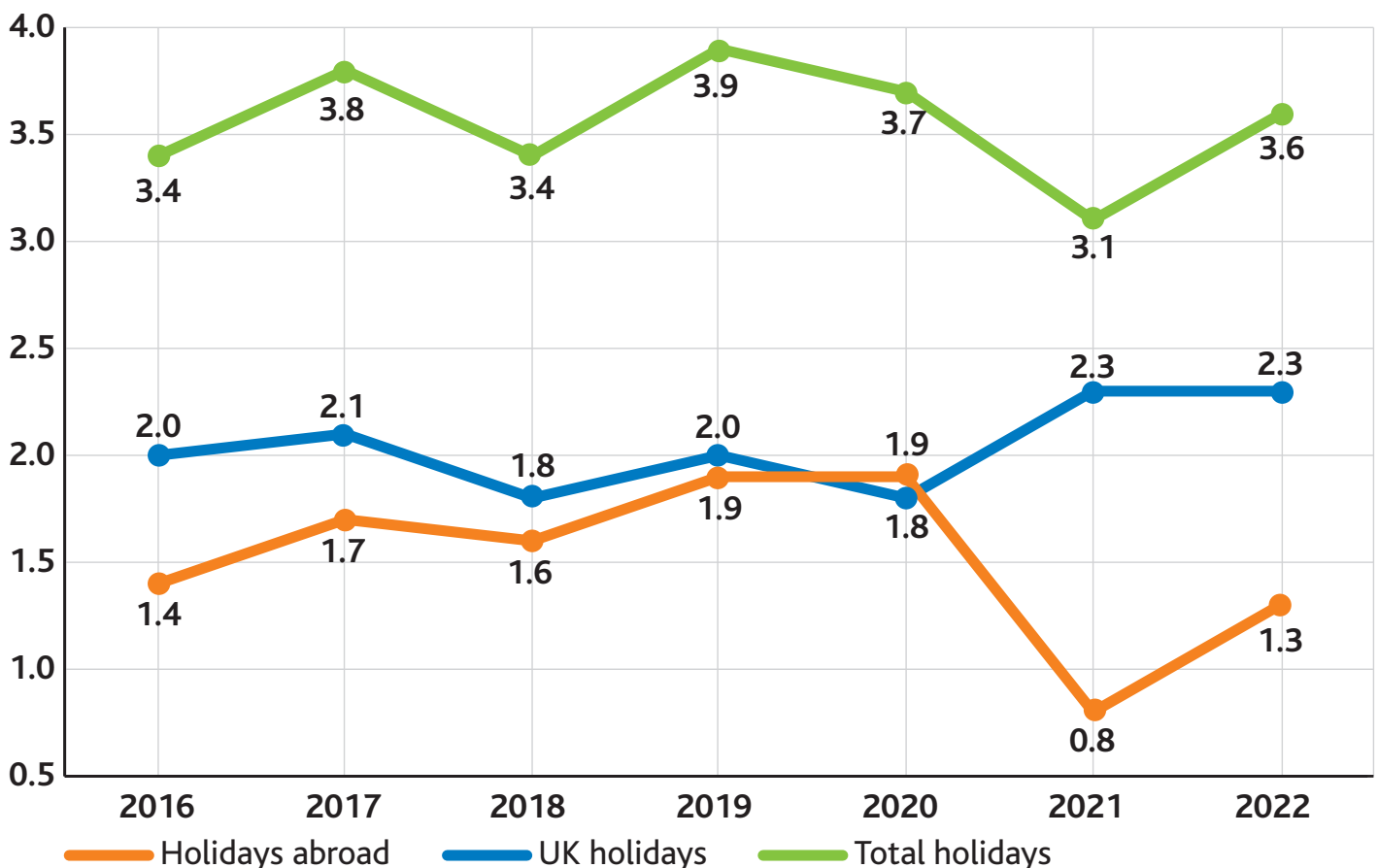
Percentage of people taking holidays in the past 12 months (2016 - 2022)



Percentage of people taking holidays in the last 12 months: 6-month split

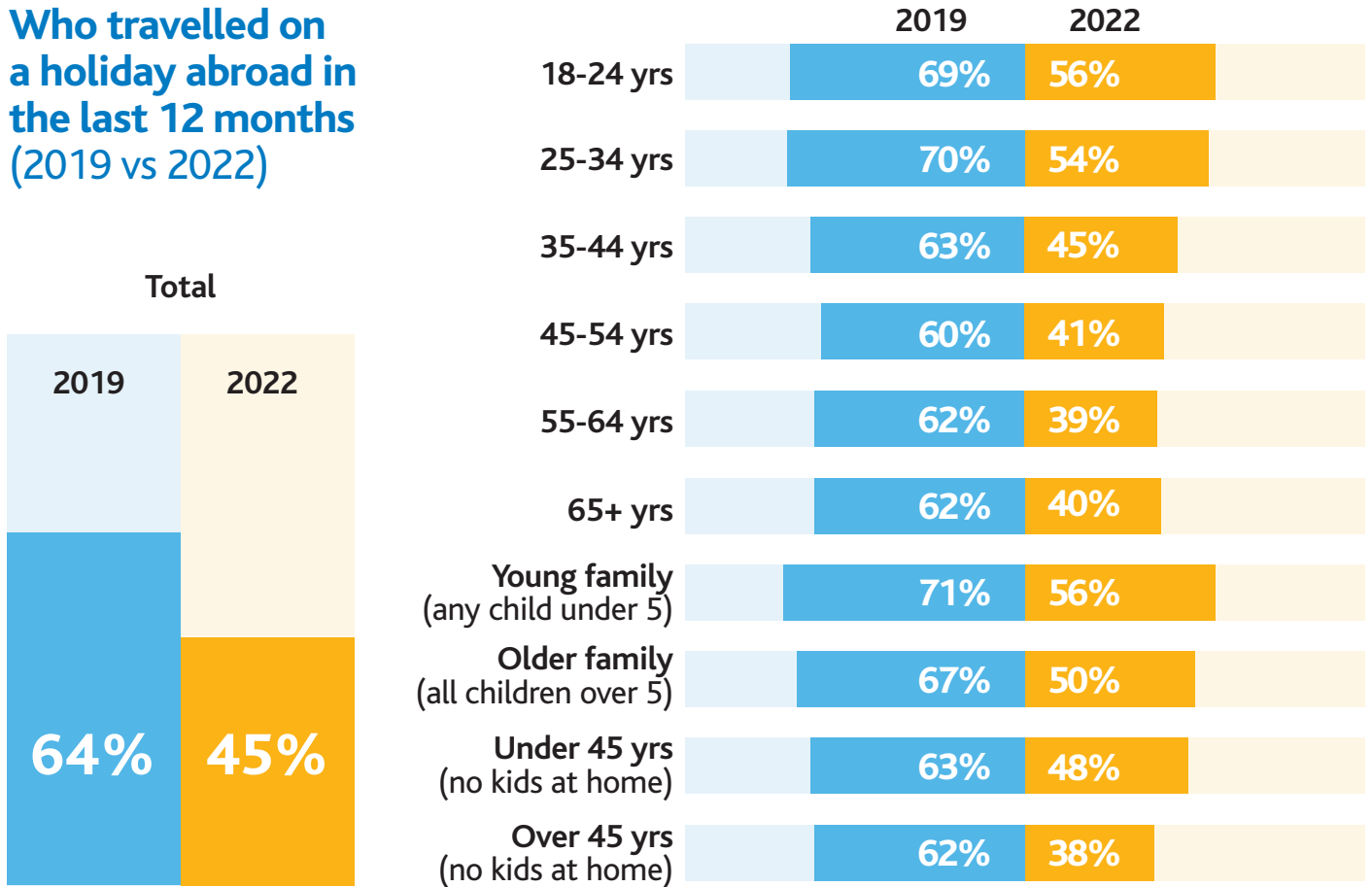
	Sep 2021 - Feb 2022	Mar 2022 - Aug 2022
Holidays abroad	21%	38%
UK holidays	48%	49%

Average number of holidays taken (2016 - 2022)



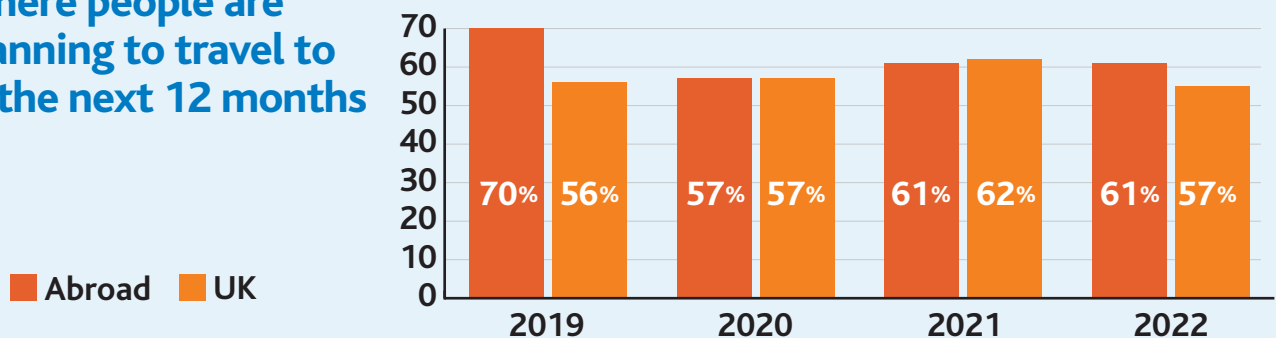
The recovery of the overseas holiday market was led predominantly by young people and families, who were most likely to have travelled abroad in the last 12 months. This is similar to patterns seen before the pandemic, though the difference between younger and older age groups has become more pronounced. Generally older people have been a little more hesitant about travelling than younger age groups since 2020, due to higher concerns around catching COVID-19.

Who travelled on a holiday abroad in the last 12 months (2019 vs 2022)



Looking ahead to the next 12 months, it seems people are as eager to enjoy a holiday abroad as they were last year, but consumer confidence has not yet returned to 2019 levels, when 7 in 10 people were planning to travel overseas. As far as UK breaks are concerned, with more options for overseas trips now on the table, last year's spike in enthusiasm for domestic holidays is levelling off.

Where people are planning to travel to in the next 12 months



BOOKING TRENDS

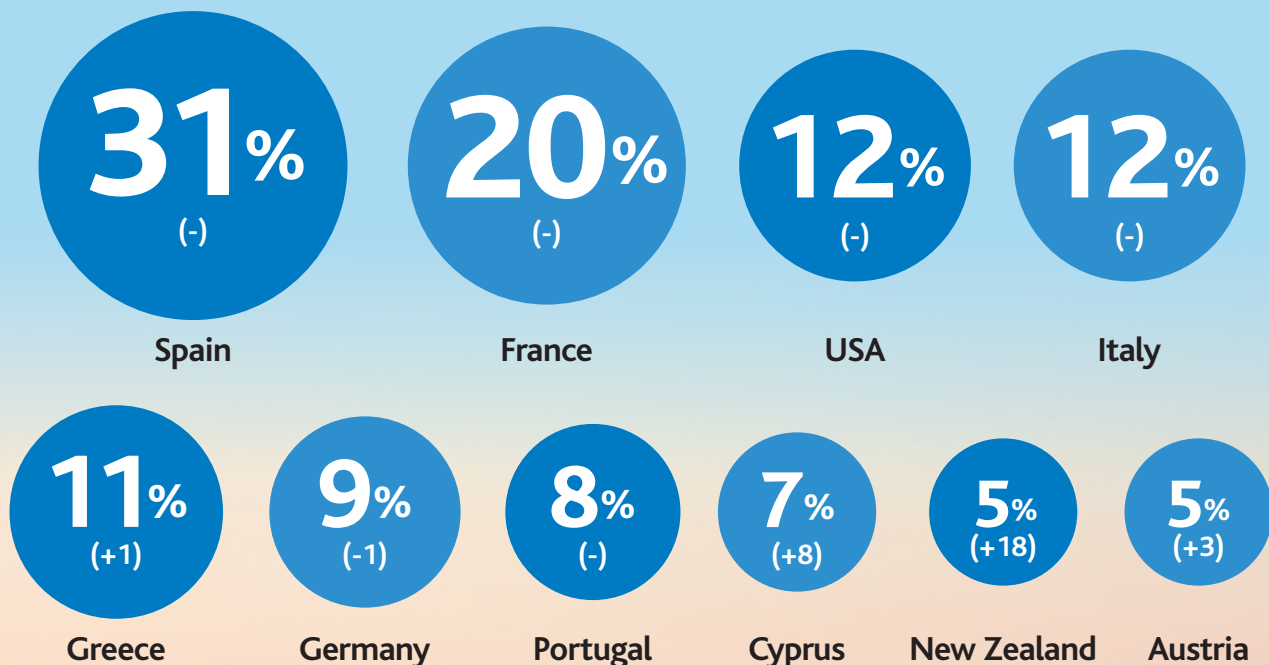
WHERE PEOPLE WENT

Unsurprisingly, the implementation and relaxation of travel restrictions shaped where people travelled in the last 12 months.

While many countries in Europe remained largely open to the travelling British public, using measures like testing and proof of vaccination to manage their borders, elsewhere we saw lengthy border closures to popular long-haul destinations, like the USA and New Zealand.

The inability to travel to these destinations during the pandemic created significant pent-up demand which was then unleashed (from November 2021 for the USA and from February 2022 for New Zealand). As a result, the top 10 most visited countries over the past year includes the usual European favourites of Spain, France, Italy and Greece, as well as a new entry from New Zealand, which has rocketed up from 27th place in 2019, to 9th place in 2022.

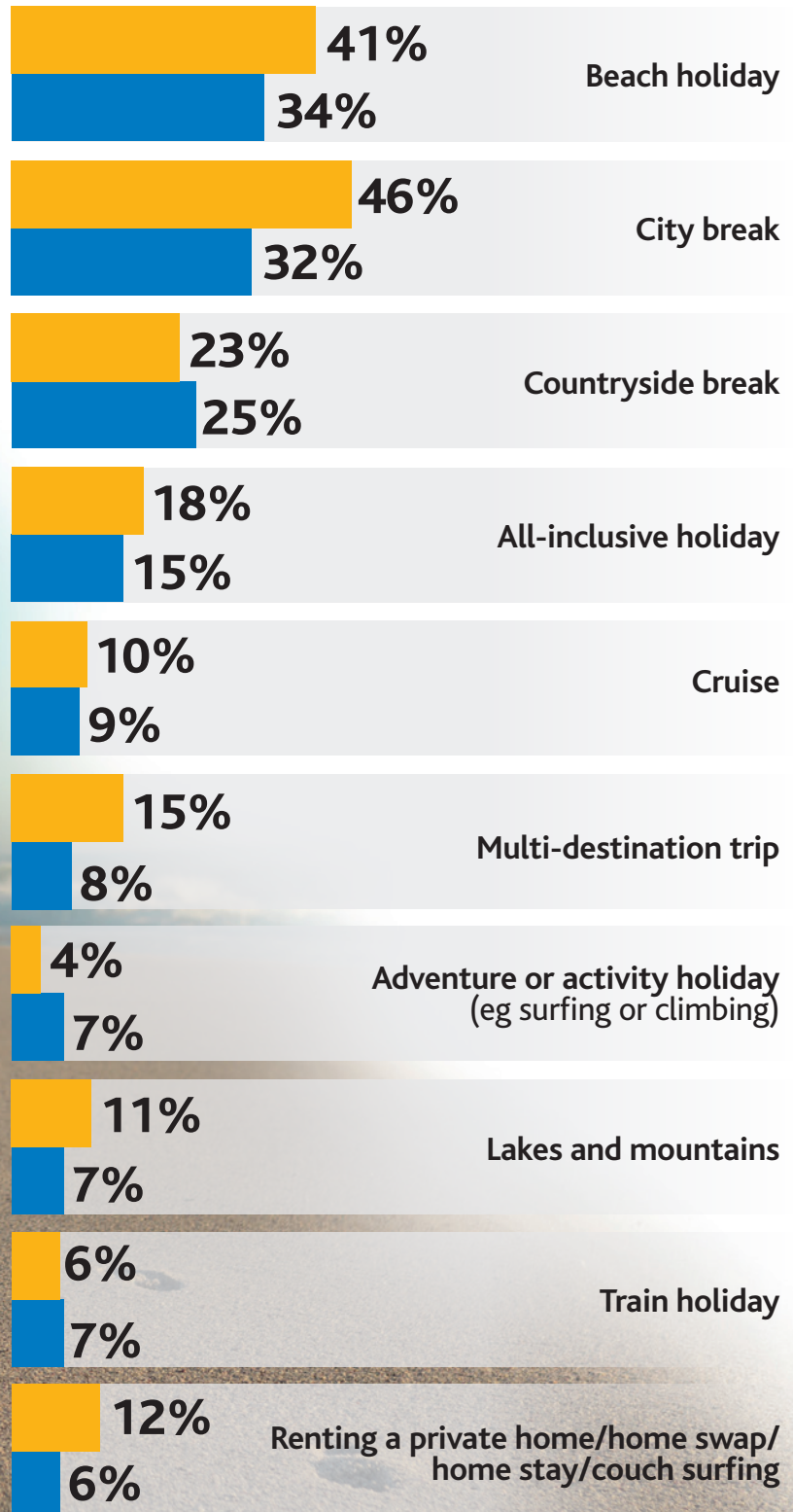
Top 10 countries visited in the past 12 months (plus difference in ranking compared to 2019)



TYPES OF TRIP

Beach holidays just pipped city breaks as the nation’s favourite type of holiday, as holidaymakers jumped at the first chance to enjoy some sun, sea and sand abroad. More people opted for a countryside break this year, compared with 2019, and all-inclusives were just shy of pre-pandemic levels. Half as many people took a multi-destination trip than before the pandemic, perhaps due to differing entry requirements between countries overseas.

Top 10 types of holidays taken in the past 12 months (2019 vs 2022)



An aerial, top-down view of a large cruise ship sailing on the ocean. The ship is oriented vertically, moving from the top of the frame towards the bottom. The deck is visible, showing various amenities including pools, decks, and a tennis court. The ship's wake is visible in the dark blue water.

Spotlight on cruise holidays

With a 16-month ban on international cruises lifting in August 2021, people were once again able to enjoy all that a cruise has to offer. Now, more than a third of people say they have been on a cruise holiday at some point, which is consistent with figures from 2021 and represents a 10% jump in demand compared with 2018.

The biggest growth market over the last five years has been among young families, with half (49%) of this group having now been on a cruise, compared with less than a third (29%) in 2018. Many of these families were introduced to cruise by last summer's hugely popular domestic sailings which clearly left a lasting impression: almost two-thirds (64%) of young families say they're interested in going on a cruise in the future – the highest of any life stage or age group.

35%

**of people have been
on a cruise holiday at
some point**

HOW MUCH HAS THE PANDEMIC RE-SHAPED OUR APPROACH TO TRAVEL?

Not being able to travel during the pandemic crystallised the importance of holidays for many people. Holidaymakers are also indicating that their experiences during the pandemic will lead to longstanding changes in how they organise their travel, with many taking steps to help them feel protected, like taking out a good travel insurance policy or booking with an ABTA Member.

How not being able to travel during the pandemic has changed the way people view and plan their holidays:

I will always make sure I have a good travel insurance policy

71% agree

I will pay more attention to the terms and conditions of what I am booking

63% agree

I will make sure I book with an ABTA Member

61% agree

I will be more selective of the companies I book with

58% agree

I appreciate how important being able to travel is and intend to go on more holidays

50% agree



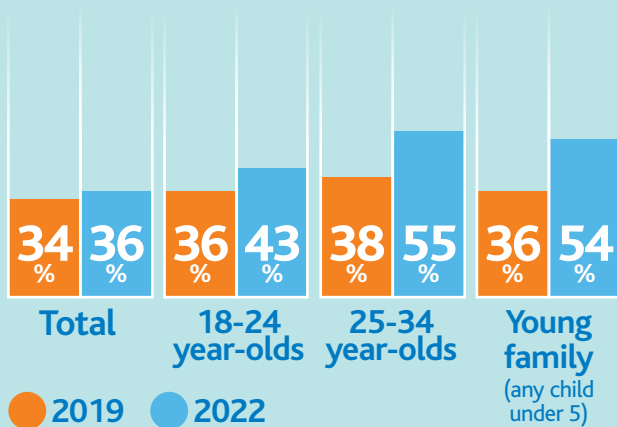
TRAVEL PROFESSIONALS AND PACKAGE HOLIDAYS

The importance of securing peace of mind – as well as getting good value for money – is leading to higher demand for travel professionals and package holidays, particularly among young people and those with young families. Packages

were the most popular way to travel on an overseas holiday in the 12-month period we surveyed, with more people customising their holiday with a shopping basket or personalised option, compared to pre-pandemic levels.

63% of holidaymakers travelled on a package abroad in the last 12 months, rising to **82%** of families with young children and **79%** of 25–34-year-olds.

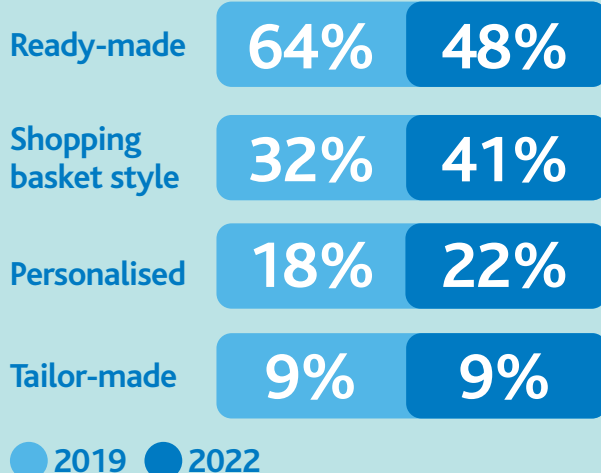
Percentage of people booking a holiday through a travel professional in the last 12 months:



Why people booked with a travel professional:

- 44% ease of booking
- 35% to have someone to help and support if something goes wrong
- 32% saves me time
- 30% I feel more confident booking through them
- 26% value for money
- 23% access to their expert help and advice

Types of package holidays people went on in the previous 12 months²



Why people booked a package holiday:

- 34% Best value option for price
- 29% Having everything taken care of (travel arrangements etc)
- 28% All-inclusive holiday
- 26% Convenience (saves time)
- 26% Reputation of company

²Ready-made = with no changes to the flight times/accommodation choice offered, shopping basket = where you select your flights, accommodation and any other extra then paid one price for the trip, personalised = where you make tweaks/additions to the holiday like upgrading flights or choosing a specific hotel room, tailor-made = where the holiday is created entirely around your requirements.

COST OF LIVING*

The UK is in the grip of a cost of living crisis, with people facing higher costs for everyday essentials, reducing people's discretionary income.

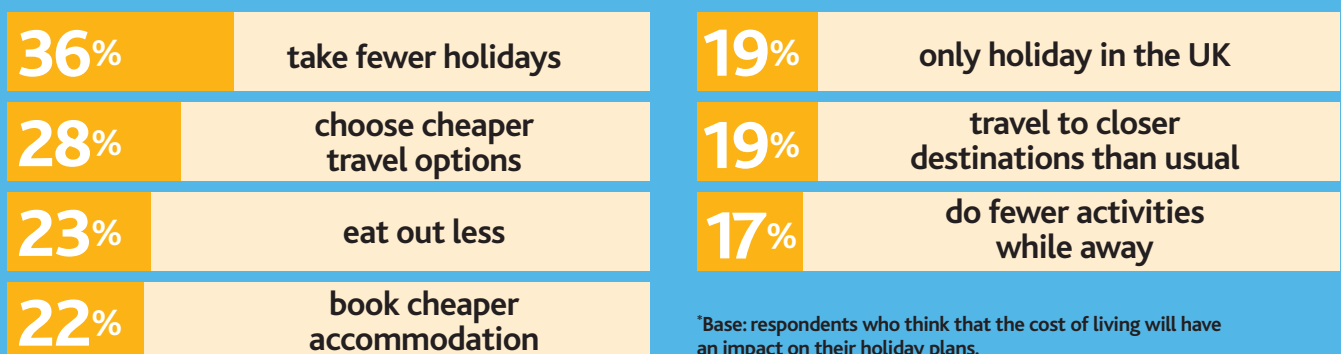
Our research shows that holidays remain a spending priority for the year ahead, though many people acknowledge they will need to make some changes to their plans in order to meet the rising cost of living. Underlining strong commitment from the public to

their holidays, people say they are more likely to cut back on non-essential spending elsewhere, such as eating out and other leisure activities, before reducing their spend on holidays. And those who said that the cost of living will have an impact on their holiday plans are more likely to take fewer holidays, opt for cheaper travel options or cut down on what they do when on holiday, rather than not go away at all.

Where people plan to reduce their spending to cover the rising cost of living:



How people* are planning to cut back on their holiday plans in the next 12 months:



*Base: respondents who think that the cost of living will have an impact on their holiday plans.



of all people surveyed are planning to not go away at all next year due to the rising cost of living, but this drops to only 4% of those who travelled in the last year.

These concerns around the rising cost of living are also feeding into people’s holiday spending intentions, with this being the main reason for people planning to spend less on their holidays next year compared to this year. However, a significant proportion of

people (31%) are planning to spend more on their holidays next year, many with a view to catching up on trips they’ve missed out on: 37% of this group are are planning to go on more holidays, while 30% say they haven’t travelled as much recently due to Coronavirus.

How much people plan to spend on their holidays next year compared to this year (Note: figures exclude those who said “unsure”)



(Base: respondents who have been on a holiday in the last 12 months)

↑

Top reasons for spending more:

37%	30%	30%	18%	17%
I’m planning to go on more holidays	I travelled less recently due to Coronavirus	The cost of holidays is going up	To ensure I can get the destination I want	I saved money during the Coronavirus pandemic /lockdowns

Top reasons for spending less:

56%	31%	18%	10%	9%
I’m cutting down my spending due to concerns around rising cost of living	Lack of confidence in economy	I’m planning to go on fewer holidays	Better planning	Change in family situation

↓

*This research was conducted from 16 to 30 August 2022, when the annual rate of inflation was around 10%³. It also took place in the run-up to and just after Ofgem’s announcement on 26 August that the energy price cap would increase by 80%, meaning at the time that the average household on direct debit would pay £3,549 per year from 1 October⁴.

The Conservative Party leadership contest was still taking place, with candidates both putting forward their suggestions on how to deal with the energy crisis, but the official announcement that household energy bills would be capped at an average of £2,500, and the Government’s tax-cutting mini-budget, had not yet taken place.

³ www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/august2022

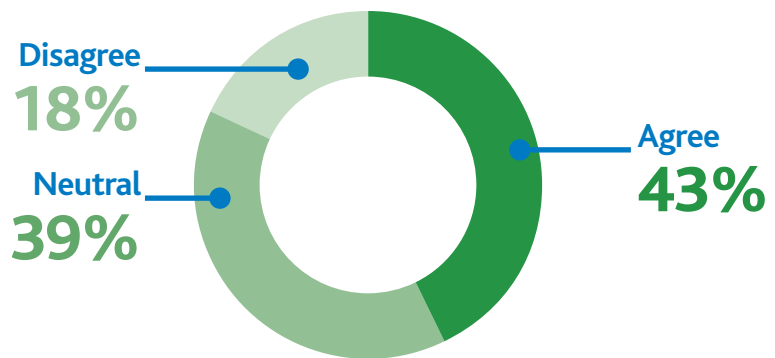
⁴ www.ofgem.gov.uk/publications/ofgem-updates-price-cap-level-and-tightens-rules-suppliers

SUSTAINABILITY IS INCREASINGLY IMPORTANT TO CUSTOMERS

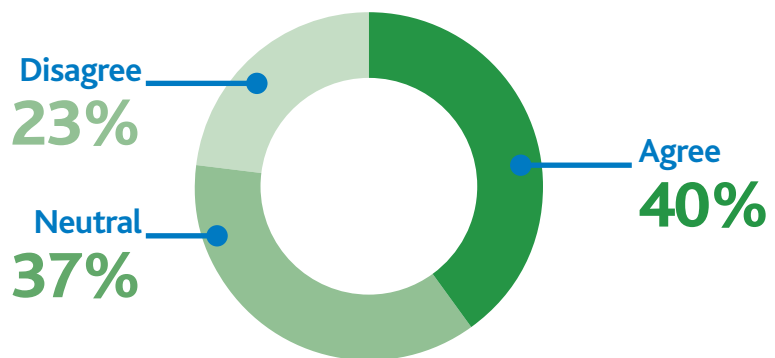
Sustainability is a priority for the travel industry and is also a firm fixture in many people’s minds when thinking about their holidays. The break from travel, caused by COVID-19, has only made sustainability more important, with 54% of people saying the travel industry should operate in a greener way than it did before the pandemic.

Holidaymakers are more likely to see it as the travel company’s responsibility to make their holidays sustainable, rather than themselves. That said, a similar proportion would like advice from their travel company about how they can make better choices, showing in both cases the value in travel businesses talking to their customers about sustainability.

It is the travel company’s responsibility to be environmentally responsible – not mine



I would like advice from my travel company about how I can make better choices for the environment and local people on holiday



ABTA Members are working on a number of fronts to develop a more sustainable travel offer. Being responsible can pay dividends for travel businesses, with two in five people now saying they are likely to choose one company over another based on a better environmental / sustainable record,

which is particularly prevalent among those aged 44 and under (average of 51%). Similarly, people are increasingly prepared to pay more for a holiday with a company which has a better environmental and social record than others – 38%, up from 19% in 2011.

41% of people say they will choose one travel company over another with a better sustainability record, up from 19% in 2011.

IMPACT OF HOLIDAYS

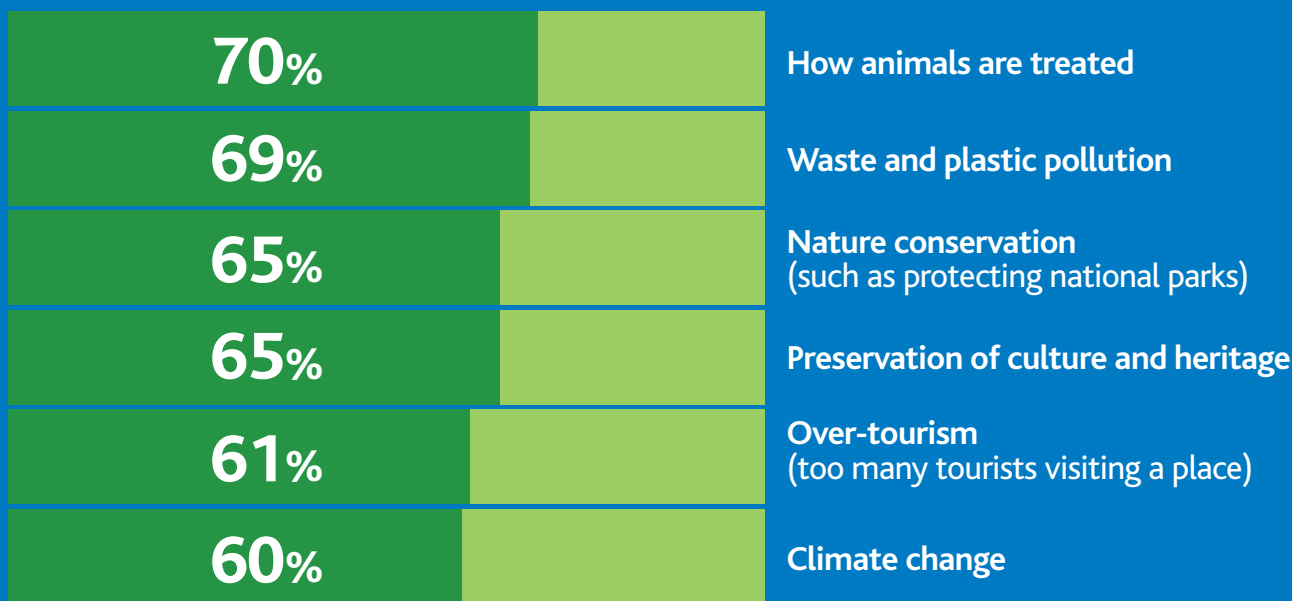
Many travellers want their holidays to have a positive impact on the destination they visit, with 63% of people agreeing that travel companies should ensure that their holidays help the local people and economy.

The top concerns for travellers around the impact of holidays cover a range of issues but, overall, are broadly related to what happens in destination. This shows the importance of

a collective approach by the industry – travel companies and destinations – to ensure the places people are visiting are benefitting from tourism.

As outlined in ABTA’s Tourism for Good report, when done well, travel and tourism is a powerful force for good: creating economic and social value, sustaining jobs and supporting businesses, both at home and abroad.

Top concerns for travellers around impact of their holidays



Climate change is among the top traveller concerns and covers a number of areas, including biodiversity which is gaining increasing focus in destinations, playing a vital role in sustainable tourism development.

Biodiversity and travel and tourism

Biodiversity is the different kinds of life you find in one area of the natural world, from animals to plants and soil to microorganisms. Biodiversity is in decline and protecting and restoring it is crucial to the health of the planet. By helping areas of the planet recover, diverse habitats will help store more carbon out of the atmosphere and help mitigate against climate change. Travel and tourism have an important role to play to advance nature conservation as well as protect and preserve communities’ practices, and way of life.

Reducing carbon emissions is part of addressing climate change and is a global priority for governments and all business sectors, including for ABTA and its Members.

It's also in the minds of consumers when thinking about their holidays. There is a strong sentiment that travel companies should be looking at cutting emissions from all parts of their holidays. As an industry we know that carbon emissions need to be identified and addressed throughout the whole holiday

experience, from getting to the airport to how hotels operate; clearly, consumers share this sentiment too.

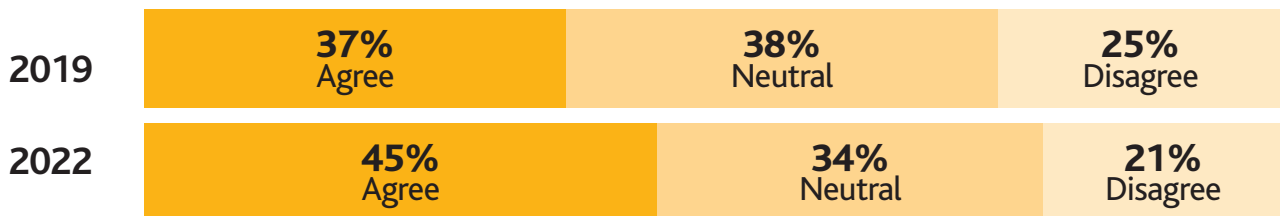
ABTA's research shows that people are increasingly conscious about the impact of air travel and cruise ships when making choices about their holiday. But people are more likely to agree (42%), than disagree, with the statement that the responsibility to be mindful about carbon emissions in tourism sits with the travel company, up from 38% in 2019.

Views about holidays, carbon emissions and climate change

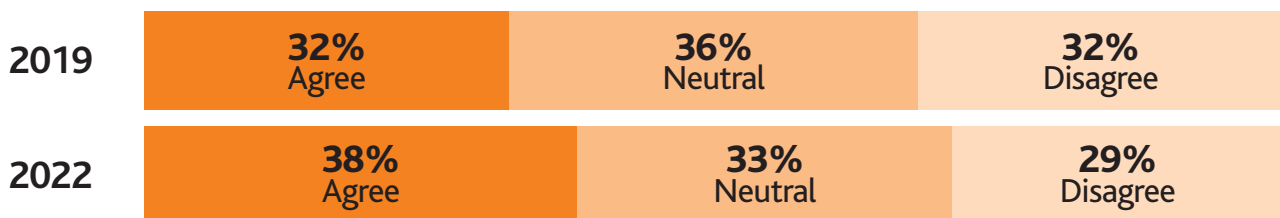
All parts of the travel industry need to look at how they can reduce their carbon emissions, not just transport providers *New question for 2022



I am conscious about the impact of air travel on the environment when making choices about my holiday



I am conscious about the impact of cruise ships on the environment when making choices about my holiday



It is the travel company's responsibility to be mindful about climate change and carbon emissions – not mine



Further information

ABTA's **Tourism for Good** report www.abta.com/tourismforgood provides a framework to guide ABTA's activities to champion sustainability with our Members, the wider travel industry, destinations and customers, as well as ways in which this can be supported by policies and action by the UK Government.

Case studies on the work ABTA Members and the wider industry is doing to develop a more sustainable travel industry can be found at www.abta.com/sustainability.

ABTA is part of Sustainable Aviation which has a long-term roadmap for delivering net zero aviation emissions by 2050, while enabling the industry to grow sustainably. For details on what is needed to achieve net zero, please visit www.sustainableaviation.co.uk.



ABTA

ABTA is a trade association for UK travel agents, tour operators and the wider travel industry.

We're the largest travel trade body, with over 3,900 travel brands in Membership who have a combined pre-pandemic annual UK turnover of £40 billion.

We work closely with our Members to help raise and maintain standards and build a more sustainable travel industry, and provide travellers with advice, guidance and support.

Together with our Members, we help you travel with confidence.

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