

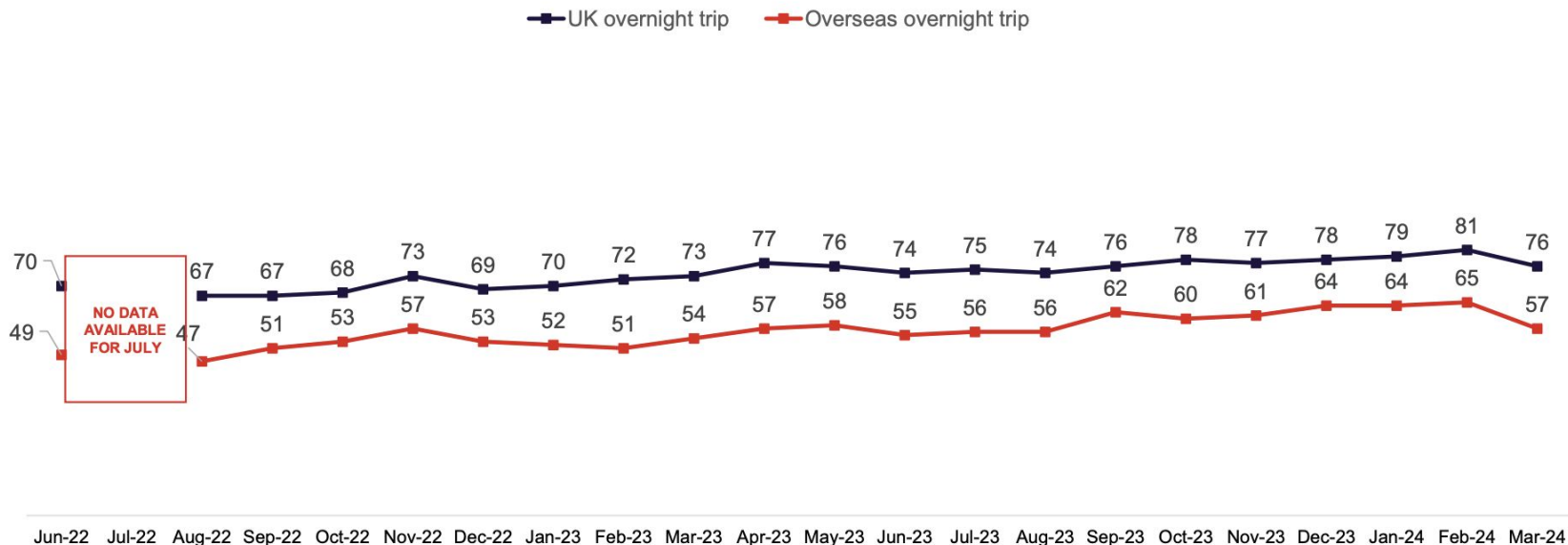


The ISLANDS of
GUERNSEY

Travel trends Q1 2024

Despite being ahead of levels this time last year, both long term domestic and overseas overnight trip intentions have decreased significantly since last month, and back to levels seen previously during summer 2023

Figure 6. Proportion anticipating going on any overnight UK and overseas trips in the NEXT 12 MONTHS, Percentage, March 2024, UK



Question: QVB2a. Thinking of your next UK holiday or short break, when are you likely to go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of your next OVERSEAS holiday or short break, when are you likely to go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents March 2024 = 1,775. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

At a 'net level', the number of both intended domestic and overseas trips by UK adults is below those taken in the last 12 months – a significant deterioration from previous waves

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to last 12 months, Percentage, March 2024, UK

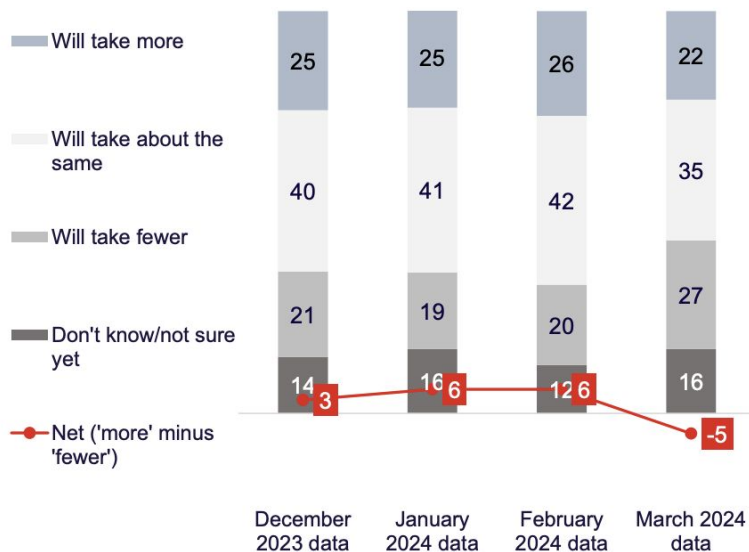
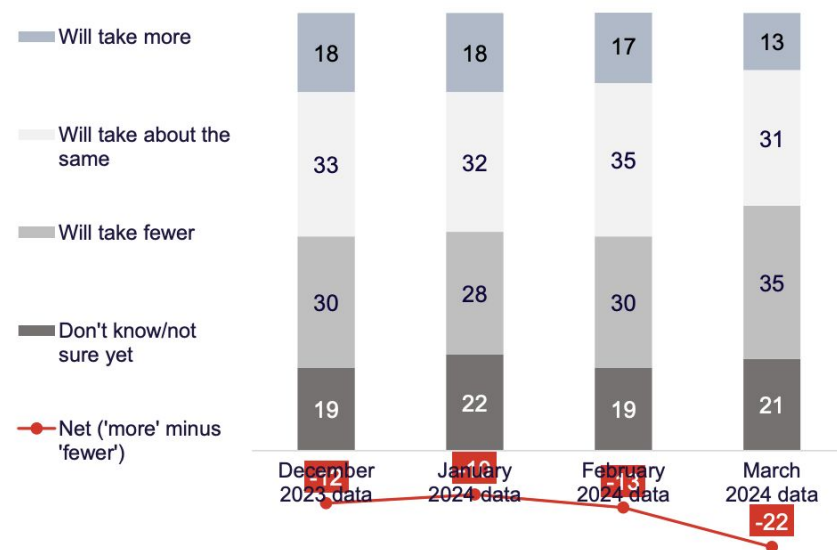


Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to last 12 months, Percentage, March 2024, UK



Question: VB1a. Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks than you took in the last 12 months? Base: All respondents. March 2024 = 1,775.

35% of respondents indicated they are more likely to choose a trip in the UK than overseas compared to the last 12 months – the top reason being ‘UK holidays are easier to plan’ (55%)

Figure 9. Difference in short break/holiday choices in the next 6 months compared to last 12 months, Percentage, March 2024, UK

■ More likely to choose UK than overseas ■ More likely to choose overseas than UK ■ Broadly the same as past 12 months ■ Don't know/It depends on the situation



TOP 5 reasons for UK preference

1. UK holidays are easier to plan (55%)
2. Shorter / quicker travel (51%)
3. UK holidays are cheaper (50%)
4. To avoid long queues at airports/cancelled flights (34%)
5. I want to take holidays in places I am familiar with (31%)

TOP 5 reasons for Overseas preference

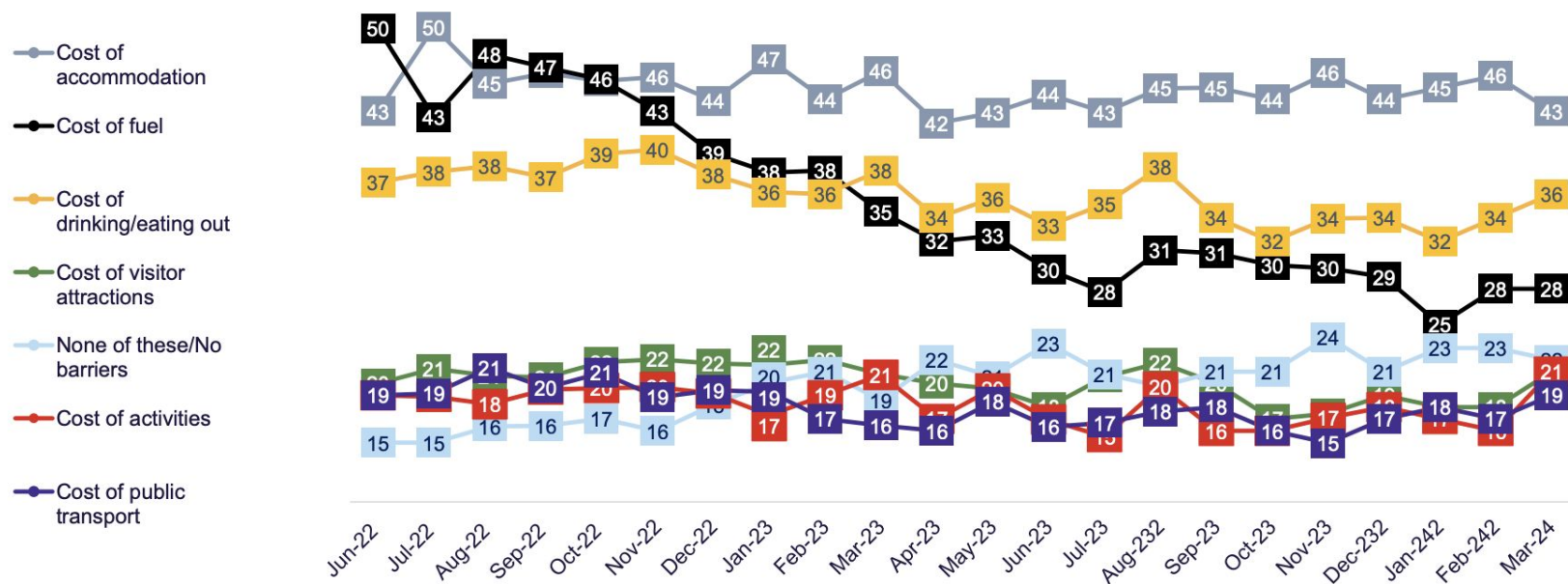
1. Better weather (47%)
2. I want to visit new places/experience new cultures (38%)
3. Overseas holidays are cheaper (25%)
4. I'm prioritising overseas trips after missing out in the last few years (23%)
5. To visit friends or relatives (18%)

FOR THE FULL LIST OF REASONS, PLEASE SEE THE PUBLISHED TABLES.

Question: VB2j. Thinking of the next 12 months, how different do you think your short break/holiday choices will be compared to the last 12 months? Base: All respondents. March 2024 = 636. VB2k. Why are you more likely to choose a UK trip than an overseas trip? March 2024 = 467 VB2l. Why are you more likely to choose an overseas trip than a UK trip? March 2024 = 1,775.

Focusing on barriers related directly to the cost of a domestic overnight trip, the 'cost of accommodation' remains at the top, followed by 'cost of drinking/eating out' – the latter increasing for the second consecutive wave

Figure 12. Individual costs barrier to taking UK holidays and short breaks in next 6 months, Wave-on-wave, Percentage, UK



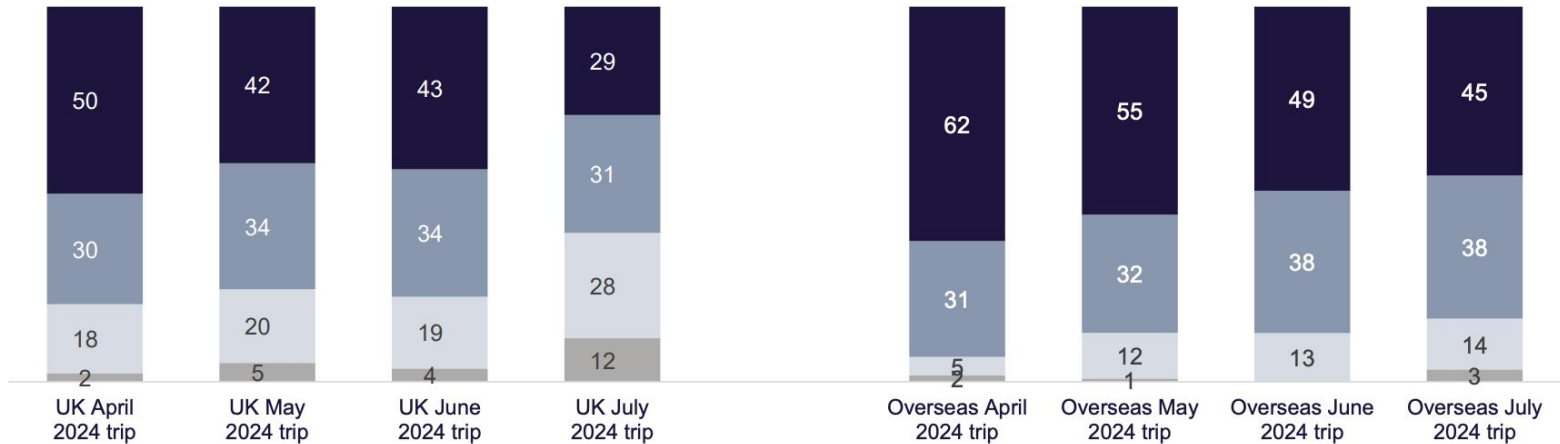
Question: VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?

Base: March 2024 = 1,775

50% of UK adults have already booked their domestic trips for April, while 62% have already booked their overseas trips for the same month

Figure 15. Planning and booking the next intended UK and overseas overnight trip, Percentage, March 2024, UK

■ I have already booked the trip ■ I have decided where to go but not yet booked ■ I am yet to decide where to go ■ I am undecided whether I will take this trip at all



Key trends

<https://www.independent.co.uk/travel/inspiration/travel-trends-in-2024-b2474261.html>

Destination dupes

"Swapping the places you know for something new – but similar – is set to influence travel in 2024. It's a good method for seeking out affordable spots without sacrificing beautiful backdrops (the need for Instagram content isn't going to disappear, wherever you go...), as well as a way of avoiding overcrowding, especially during high season."

Sleep and repeat

"All hail the rise of sleep tourism – Booking.com says 58 per cent of travellers get away solely to focus on uninterrupted shut-eye. The growth of sleep concierges and the use of technology to ensure counting sheep pays off is predicted to grow in 2024"

Keeping it cool

"One of the worst portmanteaus is set to dominate holiday travel this year: "coolcaytion". While foreign jaunts for Brits have long been about chasing the sun and returning home bronzed, the scorching heat of recent years – rising mercury and wildfires blighted Europe in 2023 – will lead to changing habits. Sebastian Ebel, chief executive of the UK's second biggest tour operator, Tui, warned that extreme weather could send people to cooler spots."

Girls going solo

"Operators dedicated to women-only trips have more than quadrupled over the past few years, states the latest Lemongrass annual travel trend report, and 64 percent of travellers worldwide are female. Another brand, Insight Vacations, has introduced Wander Women tours crafted by all-female teams; they say it's about more than the destination, it's a "journey of self-discovery, empowerment, and connection". Catherine Edsell, founder of Cath Adventure, a tour operator specialising in adventure tours for women said: "Such rapid change can only occur in a stripped-back environment where you allow yourself to be touched by nature, and supported by others."



MINTEL

Over half of UK consumers intend to travel overseas in the next year

Despite the rising cost of living many Brits remain eager to prioritise holidays within their discretionary spending.



Base: 2,000 internet users aged 16+ | Source: Kantar Profiles/Mintel, November 2023

Multi-generational holidays a rising trend for UK holidaymakers

Interest in family holidays increased by 5 percentage points in the 12 months leading up to November 2023.



Base: 1,776 internet users aged 16+ who are planning to take a holiday in the next 12 months
Source: Kantar Profiles/Mintel, November 2023

Rise of the multi-generational holiday

“The lockdown restrictions meant that many families spent more time together over the past couple of years compared to before the pandemic. Many are eager to continue this trend, with interest in family holidays increasing pointing to the rising trend of multi-generational holidays.”

Recommendation for less-touristy places

“With the issue of over tourism becoming more prominent in the media – often focusing on locals’ complaints and disgruntled with large numbers of tourists descending on a destination in such a short amount of time – Mintel’s holiday market research reveals that tourists are increasingly keen to book holidays in less-known and quieter destinations.

UK holiday industry trends: 66% of travellers would be interested in travel companies suggesting quieter alternatives to tourist hotspots.”

Key trends

<https://www.visitengland.com/englands-2024-travel-scene-whats-trending>

Peak behind the scenes

“Calling the curious: 2024 is full of opportunities to explore places and landmarks as you’ve never seen them before. Maybe you’ll immerse yourself in 2,000 years of history at Leicestershire’s revamped Jewry Wall Museum (autumn) or discover the medieval keep (tower) of Norwich Castle for the very first time, as the mighty fortress reopens this summer after an extensive restoration.”

New reasons to get outdoors

“Take a walk on the wild side! Recent VisitEngland Domestic Sentiment Tracker insights show us that UK holidaymakers are ‘more likely’ to seek out outdoor areas and leisure or sports activities in 2024, thanks to the affordability of activities like hiking, cycling and swimming*– and of course, it’s a boost for health and wellbeing too. The King Charles III England Coast Path, the world’s longest continual coastal walking route, will fully open by the end of the year – an incredible 2,700-mile (4,498km) trail through the nation’s most glorious beaches, clifftops and seaside towns. Meanwhile, Lancashire’s Garstang Walking Festival will hold its 20th anniversary celebration in May, Wiltshire’s Corsham Walking Festival will celebrate its 10th anniversary in June and the Isle of Wight Walking Festival will mark 25 years (spring and autumn) – featuring expert-led hikes and activities for all abilities.”

