Holiday Trends 2014
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Introduction

The BDRC Continental Holiday Trends report examines the latest holiday behaviours and attitudes, with a focus upon identifying emerging trends.

The report includes up-to-date information on emerging destinations, booking habits and accommodation favourites, both overseas and within the UK.

With digital media ever increasing in its importance at each stage of the holiday process, from inspiration through to experience review, the report also has a strong focus in this area. The changing roles of social media, online review sites and mobile communications each come under the spotlight.

Survey details

The BDRC Continental Holiday Report 2014 is based upon up-to-date primary research among a national sample of c.1000 UK adults aged 20 to 64 years. All were interviewed online in January 2014. The sample interviewed reflects the demographic profile of the 31.8 million UK adults aged 20 to 64 years who are online. The data was weighted at the analysis stage to reflect the UK adult online population profile.
Domestic Tourism in pictures

‘Staycation’ on the decline

Reduced bookings to weather dependent destinations

Scotland
- 7% in 2013
- 4% in 2014

South West
- 5% in 2013
- 4% in 2014

London bucks the booking trend

Self-catering bookings up

Bookings more last minute

Trust in review sites slipping

Bookings up 2 percentage points

- 23% in 2013
- 27% in 2014

- 3.9 months before 2013
- 3.6 months before 2014

- 52% in 2013
- 45% in 2014
Outbound Tourism in pictures

Rise in planned overseas holidays

Western Europe and Mediterranean driving increase in overseas holidays

Transatlantic bookings decline

Likely to take a cruise in next 2 years

Bookings more last minute

Trust in review sites slipping

73% 2013
78% 2014

57% 2013
60% 2014

North American down
7%

Caribbean Down
4%

same across all age groups

24%

3.9 Months before 2013
3.6 Months before 2014

52% 2013
45% 2014
## Executive Summary / 1 - Domestic Tourism

### ‘Staycation’ on the decline

Predicted UK holidays of 7 nights or more are at their lowest since 2010, with 45% of the UK holiday market planning a domestic holiday in 2014 compared to highs of 56% in 2013 and 58% in 2012. Combined with short-breaks, actual and predicted holidays in the UK also down on 2013. It is worth noting that the survey was run during the UK’s poor weather which may have affected sentiment towards a domestic holiday.

### Intention to holiday in the UK is lower across all social grades

The drop in intended holidays in the UK is driven by ABC1s ‘upgrading’ to overseas holidays (56% to 43% 2013) and C2DEs considering fewer holiday options e.g. not overseas as well as UK, and prioritising holidays overseas this year.

### Reduced bookings to ‘weather-dependent’ destinations

Seaside destinations in the South West and all areas of Scotland witness a drop in bookings this year. However, there is a rise in predicted bookings to these areas, suggesting that the drop is driven by uncertainty about the weather.

### London bucks the trend and is now most popular holiday destination

For the second consecutive year bookings to London have increased, bucking the declining trend in other UK destinations. 13% have booked a holiday there for 2014, compared to 11% in 2013 and 10% in 2012. The Scottish Highlands is second most popular, 9% having booked there compared to 13% in 2013.

### Scotland and South West most popular areas to holiday in the UK

On an overall level, Scotland remains the most popular area of the UK to visit although, unlike previous years, this is shared with the South West, both likely/booked holidaying areas for 25% of the UK market. Scotland’s movement from ‘outright first’ to ‘joint first’ is due to an 8 percentage point decline from 31% in 2013. The South West has remained consistent with findings from last year.
Executive Summary / 2 - Outbound Tourism

Overseas holidays at their highest in 5 years

78% of British people are planning a holiday overseas in 2014 compared to 73% in 2013. This uplift is driven by more affluent ABC1s who are significantly more likely to have this intention (82% compared to 74% in 2013). C2DE overseas holiday intention has remained similar to 2013.

Western Europe and Mediterranean main beneficiaries of increase in overseas holiday

There is a 3 percentage point uplift in the proportion of the market seriously considering a holiday in Spain (60%, from 57% in 2013); Italy (13% from 12%) and Greece (12% from 10%) the most notable increases.

Transatlantic holidays declining

There has been a notable drop in predicted holidays to North America (14% from 21% in 2013) and the Caribbean (5% from 9% in 2013). The drop is most notable amongst C2DEs who are perhaps cutting back on long haul and more affordable options.

Intention to take a cruise holiday age neutral

The intention to take a cruise holiday is now age neutral. 24% of the market stated they are likely to take a cruise in the next 2 years with little deviation across age groups.
Executive Summary/3 - Holiday Booking and Communication

Holiday bookings becoming more last minute

The lead time between actual/expected holiday bookings has decreased to 3.6 months in 2014, a drop from 3.9 months in 2012 and 2013. The proportion who expect to book their holiday one month before departure has increased from 11% to 14%. This is largely driven by lower social grades, perhaps due to reduced financial security and an uncertainty over whether they will take their holiday.

Trust in review sites is slipping

The proportion stating that they trust the accuracy of online review sites has dropped to 45% in 2014, from 52% in 2013. This may be as the review sites seek to monetise their visitor numbers by adding bookings to reviews.

Smartphone use on holiday has increased as mobile functionality improves

Overall smartphone use on holiday has risen from 69% in 2013 to 78% in 2014 – almost 8 in 10. Within that, internet use on holiday is also up (from 69% to 78%) – enabled in part by hotel groups responding to increased demand for free Wi-Fi. An increase in functionality has driven a rise in smartphone photography (from 53% to 58%), and app use (45% to 57%).
Headline tourism intentions
Around 7 in 10 Britons intending on taking a main holiday in 2014

When do you plan to go on your next main holiday i.e. a holiday of 7 nights or more away from home? (New question in 2014 – therefore no trend data)

67% of Britons are planning on taking a main holiday in 2014, three quarters of whom plan to do so between March and August. Unsurprisingly, the summer months are most popular, when 31% are planning to take their next main holiday. This is particularly the case amongst families (39% intending to holiday in Jun-Aug 2014).

Just under a quarter of the population (24%) have no plans or desires for holidays.
Lower social grades significantly less likely to intend on taking a holiday

When do you plan to go on your next main holiday i.e. a holiday of 7 nights or more away from home?

Holidaying intentions vary across demographic groups. 20-34s (70%) and families (71%) are most likely to be planning to take a holiday in 2014.

There is also a gap in holiday intention between higher and lower social grades, ABC1s significantly more likely to be planning on taking a holiday than C2DEs (72% v 58%). Is this indicative of the so-called 'cost of living crisis' and its impact on lower income groups?
Overall job security is increasing

As the UK emerges from the recession, overall feelings of job security have improved since the same period in previous years. Just over 1 in 10 (11%) feel that it is very/fairly likely they will lose their job in 2014 compared to 16% in 2013.

In previous years, increased job security is accompanied by higher intentions of taking holidays overseas. Will this confidence have an impact on the staycation?
And this has resulted in higher holiday spend expectations.

Improved job security is accompanied by a rise in expectations of higher spending on holiday travel in 2014; 26% of the UK market expecting to spend more in 2014 compared to 23% in 2013.

As with holiday intentions, increased optimism is not shared across social grades and there is evidence of polarised spending plans. C2DEs are less likely to expect to spend more, and more likely to either spend less or to be unsure of their spending this year; a pattern that was not apparent in 2013 when both groups had similar spending intentions. Is this a further reflection of the perceived higher cost of living amongst lower income groups?
Destinations:
UK and Overseas
Overseas holidays on the rise but the ‘staycation’ has dropped

At the height of ‘the staycation’ in 2012, the difference between overseas and UK holiday intentions was only 8 percentage points; this has now grown to 33 percentage points - the same difference as in 2010. This continues a trend first identified in 2013 but whereas this was driven by an increase in intention to holiday overseas, with domestic holidays staying stable, this year predicted overseas holidays have increased at the expense of holidays in the UK. At 78%, intention to holiday overseas is at its highest to date.

We are keen to point out that the survey was undertaken during January 2014 when the UK was experiencing extreme weather conditions. It is likely that this has strongly driven domestic holiday sentiment and a desire to ‘escape’ to warmer climes. A return to more normal spring weather conditions may erode this sentiment - especially with the average lead booking time having declined since 2013 (see slide 26). It is also worth noting that UK holiday intentions are still comparable to 2010 and 2011 and therefore does not represent the end of the ‘staycation’
Higher social grades ‘upgrading’ to overseas holidays. Lower social grades reducing holiday options.

Intended main holidays (7+ nights away from home) (%)

<table>
<thead>
<tr>
<th></th>
<th>UK 2013</th>
<th>UK 2014</th>
<th>OVERSEAS 2013</th>
<th>OVERSEAS 2014</th>
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<tr>
<td>ABC1</td>
<td>56</td>
<td>43</td>
<td>74</td>
<td>82</td>
</tr>
<tr>
<td>C2DE</td>
<td>56</td>
<td>49</td>
<td>72</td>
<td>71</td>
</tr>
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</table>

Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home,?

Overseas/UK holiday intention changes are driven by the activities of different social grades. Compared to 2013, there has been a movement in ABC1s deciding to holiday overseas, at the expense of UK holidays (which have declined for this group). Amongst C2DEs, the intention to holiday overseas has remained consistent with 2013, whereas UK holiday plans have fallen.

For ABC1s, the implication is that UK holidays are being replaced by overseas holidays as their financial security improves. Have a proportion of C2DEs dropped the UK holiday from their calendar? Perhaps lower funds mean that they have been forced to prioritise one over the other and bad UK weather has made overseas a more popular choice.
Holiday destinations considered has declined since 2013, driven by C2DEs

Intended main holidays (7+ nights away from home) (%)

2013

<p>| | |</p>
<table>
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<th></th>
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</thead>
<tbody>
<tr>
<td>ABC1</td>
<td>1.75</td>
</tr>
<tr>
<td>C2DE</td>
<td>2.66</td>
</tr>
</tbody>
</table>

2014

<p>| | |</p>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC1</td>
<td>2.89</td>
</tr>
<tr>
<td>C2DE</td>
<td>2.16</td>
</tr>
</tbody>
</table>

2014 sees a reduction in the number of main holiday destinations considered for 2014. This is solely driven by C2DEs who are considering an average of 2.16 destinations this year compared to 2.66 in 2013. Conversely ABC1s are considering a slightly higher number of destinations for 2014 (2.89 v 2.81).

As alluded to above, this drop suggests that C2DEs are in a financial situation where they are unable to consider multiple main holiday options for 2014. The unpleasant domestic weather has perhaps led to the UK losing out.
Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

- **USA / CANADA**: DOWN 7%
- **CARIBBEAN**: DOWN 4%
- **CENTRAL/SOUTH AMERICA**: ± 1%
- **UK**: DOWN 11%
- **WESTERN EUROPE**: UP 3%
- **EASTERN / CENTRAL EUROPE**: ± 1%
- **MIDDLE EAST**: DOWN 2%
- **ASIA**: ± 1%
- **AUS/NZ**: ± 1%

Regions considered at a glance (% increase since 2013)
Planned trips to Western Europe/ Mediterranean on the increase; North America declined.

Top regions considered (%)

Intentions to holiday in Western Europe/The Mediterranean have continued to increase in 2014, and are at their highest since the survey began. Conversely, the significant rise in main holidays planned to North America in 2013 has been reversed, with a 7 percentage point drop. This drop is consistent across all social grades but is more pronounced amongst C2DEs (9 percentage points). This is perhaps driven by the rising expense of transatlantic air travel and lower social grades pulling back on the more expensive holiday options.
Holidays to the Caribbean also declined since 2013.

Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home?

Holidays to the Caribbean also look set to decline in 2014. 5% seriously considering a holiday there compared to 9% in 2013.

Holidays to Africa (including North Africa) have remained stable, although there is no return to the highs of 2011 before the onset of political trouble in the North of the continent.
2013 Rise in holidays to Spain consolidated; Italy and Greece benefitting from increased inclination to holiday overseas.

Top destinations considered in 2011/2012 (%)

Which destinations are you seriously thinking about taking your main holiday, i.e. holiday of 7 nights away from home,?

Spain continues to be the top holiday destination outside of the UK, consolidating the rise in intentions to holiday there in 2013.

The jump in main holidays considered in Western Europe/Mediterranean has been driven by a slight rise in the proportion of holiday makers planning trips to Italy and Greece.
Holiday types remain consistent with 2013. Greater certainty amongst consumers

Types of main holiday (%)

<table>
<thead>
<tr>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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</thead>
<tbody>
<tr>
<td>40%</td>
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<td>21%</td>
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<td>20%</td>
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<tr>
<td>15%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>4%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>8%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>12%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

A holiday where you book the travel independently from the accommodation

An all inclusive package with a tour operator

Other type of package holiday where travel and accommodation is all included

A cruise

Other

Not sure

Will your main holiday be…?

The type of anticipated holiday package has remained consistent with previous years. Booking a holiday where you book the travel independently from the accommodation is the most popular choice at 44%. The proportion of Britons planning an all-inclusive holiday either with a tour operator or with another third party remains consistent with previous surveys. 20-34 year olds are the most likely to take a package holiday (43% doing so compared to 32% of 35-54s and 31% of 55-64s).

It is worth noting the reduction in holiday makers who are ‘not sure’ how they will book their holiday. Is this an indication of the holiday booking process becoming more straightforward?
Slight drop in propensity to stay in upmarket hotels

Half of holiday-makers are likely to stay in hotel accommodation on their main holiday in 2014, a 5 percentage point drop on the 55% who intended to do so in 2013.

This drop is driven by a fall in upmarket hotel consideration and to a lesser extent, intention to stay in 3 star hotels. Self-catering has increased in popularity, 15% intending to take this option.
Further evidence that cruise holidays are becoming age neutral

5% of Britons are seriously considering a cruise in 2014, a similar proportion to previous years. Of those, around 3 in 5 have been on a cruise before, with almost 2 in 5 planning on doing so for the first time.

A higher proportion of respondents indicated they are likely to take a cruise in the next 2 years, almost 1 in 4 stating they are at least fairly likely to do so. This intention is consistent across all age groups, which is in line with trends found elsewhere.
Average holiday maker expects to stay away from home for 9 nights – variation across sub-groups

Nights expected to stay on holiday (%)

On average, British holiday makers expect to spend 8.8 nights away from home on their next main holiday, the most popular time frame being 5-7 nights (45%).

The anticipated mean holiday duration differs across a number of sub-groups:

- Age – Older age groups expect to spend longer away from home than younger age groups. 20-34s 8.0 nights away from home; 35-54s 9.1 nights; and 55-64s 9.4 nights

- Household composition – Holiday makers with children in their household are likely to take shorter holidays than those without. This can be driven by the higher expense of holidays outside of school term time. Families 8.2 nights; Non-families 9.1 nights

- Social grade – Higher social grades are also likely to spend more time on their holiday, ability to pay perhaps driving longer trips. ABC1s expecting to spend 9.1 nights away from home and C2DEs 8.1 nights.
Holiday bookings are becoming more last minute than in previous years

Lead time between booking and departure (%)

There has been a drop in the lead time between booking a holiday and departure to 3.6 months in 2014 from 3.9 months in 2013 and 2012. The proportion of holiday makers who have booked/are likely to book their holiday less than a month before departure has risen to 11% (from 7%) and 1 month before departure to 14% (from 11%). The drop is most apparent amongst lower social grades who book on average 3.6 months before departure compared to 4.0 months before in 2013.

BDRC Continental’s work elsewhere underlines that a proportion of holiday makers left their holiday booking as late as possible because they wanted to see what the UK weather was like first. It also highlighted that holidays are often booked more last minute when financial security is lower, perhaps explaining the movement amongst C2DEs.
UK Holidays
Despite predicted drop in staycation, UK appeal remains the same

In the last few years would you say the UK has become more appealing or less appealing to you as a destination for either a main holiday or a short break?

There has been a marginal decline in the proportion of respondents who regard the UK as less appealing than in 2013, although the proportion consider it as more appealing continues to drop from the highs of 2011.
In line with main holiday intentions potential and actual UK breaks have declined since last year

Have you already booked/are you likely to book a main holiday or short break in paid accommodation in the UK?

When asked about intention to take any holiday in the UK (not just a holiday of 7 nights or more) responses are similar to consideration of the UK as a main holiday destination (of 7 nights or more). Likelihood to book (65%) and actual bookings (21%) have both declined since 2013.
London continues to buck the booking trend.

For the second consecutive year, London bucks the overall downward trend of booked holidays in the UK, a higher proportion of Britons having already booked a holiday there than in 2013. The Scottish Highlands – and all Scottish regions – have witnessed a decline in booked holidays. Seaside destinations such as Cornwall and Devon are also on the slide.

The implication is that the extreme British weather during the 2014 survey period means that people are waiting before committing to destinations most likely to be affected by the weather. London, with its range of iconic indoor attractions, is a safer choice.

Top 20 UK destinations booked (main holidays/short breaks) (%)

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>13</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>Scottish Highlands</td>
<td>9</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Cornwall</td>
<td>8</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Devon</td>
<td>7</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Scottish Lowlands</td>
<td>6</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>North Wales</td>
<td>6</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>South Wales</td>
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<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Lake District</td>
<td>5</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Yorkshire</td>
<td>5</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>5</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>West Wales</td>
<td>4</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Dorset</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Norfolk/Suffolk</td>
<td>3</td>
<td>5</td>
<td>3</td>
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<tr>
<td>Somerset</td>
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<td>Cheshire</td>
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<td>Northumberland</td>
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<td>2</td>
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<tr>
<td>West Mids</td>
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<td>East Mids</td>
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<td>Northern Ireland</td>
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<td>8</td>
</tr>
<tr>
<td>Sussex</td>
<td>3</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Scottish Borders</td>
<td>2</td>
<td>4</td>
<td>7</td>
</tr>
</tbody>
</table>
Increased likelihood to book at seaside and Scottish destinations suggests many are delaying the booking decision – due to weather or economy?

Top 20 UK destinations likely to book (main holidays/short breaks) (%)

<table>
<thead>
<tr>
<th>Destination</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scottish Highlands</td>
<td>19</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Cornwall</td>
<td>18</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>Devon</td>
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</tr>
<tr>
<td>Edinburgh</td>
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</tr>
<tr>
<td>London</td>
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<tr>
<td>South Wales</td>
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<td>Yorkshire</td>
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<td>Scottish lowlands</td>
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</tr>
<tr>
<td>North Wales</td>
<td>9</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Dorset</td>
<td>7</td>
<td>6</td>
<td>4</td>
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<tr>
<td>Norfolk/Suffolk</td>
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<tr>
<td>Scottish Borders</td>
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<td>South Coast</td>
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<tr>
<td>Somerset</td>
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<td>Isle of Wight</td>
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<td>New Forest</td>
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<td>1</td>
</tr>
<tr>
<td>Gloucestershire</td>
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<td>2</td>
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Which of these describes where you have already booked your UK holiday of 7 nights or more / short break of 1-4 nights in paid accommodation in? (All who have booked a UK holiday)

Despite lower actual bookings, the British domestic market demonstrates a higher intention to holiday in seaside destinations such as Cornwall, Devon and South Wales and all Scottish regions in 2014 than in 2013. This suggests that the lower bookings outlined above are a consequence of delays in the decision to holiday in these destinations rather than disregarding them from their holiday portfolio.

This trend may be driven by the poor January/February weather or a pattern towards more last-minute bookings. Does this suggest a need for destinations to continue with marketing activity, putting emphasis on ‘non weather-dependent’ appeal?
Drops in bookings and predicted bookings in most regions of the UK. South West and Scotland most likely holiday destinations

<table>
<thead>
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<tr>
<td>Scotland</td>
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<tr>
<td>London &amp; SE</td>
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<td>North West</td>
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<td>North East</td>
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</tbody>
</table>

Which of these describes where you have already booked / likely to book your UK holiday of 7 nights or more / short break of 1-4 nights in paid accommodation?

On an overall level, Scotland and the South West are the areas of the UK most likely to attract domestic holiday makers in 2014, 25% having booked or likely to have booked a holiday there.

Generally, the majority of regions in the UK have experienced a drop in bookings and intention since last year.
Service accommodation key for UK market, but popularity of self-catering has increased

Of the market who have booked/are likely to book a holiday in the UK in 2014, the majority (56%) will stay in hotels. This has declined since 2013, driven by a drop in the proportion who are looking to stay in 4 or 5 star accommodation. Intention to take the self-catering option has increased to 27% from 23% in 2013 and is now the second most popular accommodation option behind 3 star hotels.

What type of accommodation are you likely to stay in on any of these holidays in the UK?

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET HOTELS</td>
<td>56</td>
<td>61</td>
<td>57</td>
</tr>
<tr>
<td>3 star hotel</td>
<td>33</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>Self catering</td>
<td>27</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>4 or 5 star hotel</td>
<td>21</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>B&amp;B / guest house</td>
<td>23</td>
<td>22</td>
<td>19</td>
</tr>
<tr>
<td>Camping / caravanning</td>
<td>13</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>1 or 2 star hotel</td>
<td>9</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>2nd home</td>
<td>0.5</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>
The decision making process
Older Britons more likely to be creatures of habit. Younger keen to try something new

How much do you agree or disagree with the following statements?

2 in 5 of the UK population agree that they *predominantly* go on holiday to countries they have been to before. With only a quarter disagreeing, the findings suggest that the majority of Britons return to previous destinations at least some of the time when taking their holidays. This trend is more apparent amongst older age groups – 55-64s most likely to holiday in countries they have been to before, and 20-34 year olds least likely.

Although this finding is largely intuitive, older age groups are also least likely to agree that it is important they ‘experience something new and different on their holidays’ (56% agreeing compared to 58% of 35-54 year olds and 64% of 20-34 year olds). Are the older generation more risk averse when it comes to their holiday decision making?

Source: Q36.
Personal experience or peer recommendation important prompts in driving interest in holiday destinations

Prompts for interest in the destination

<table>
<thead>
<tr>
<th>Prompt</th>
<th>20-34 yrs</th>
<th>35-54 yrs</th>
<th>55-64 yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous experience of the destination</td>
<td>35%</td>
<td>51%</td>
<td>60%</td>
</tr>
<tr>
<td>Direct recommendations from friends</td>
<td>24%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Booking websites or tourism review newsletters / information</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General media articles / features on the destination</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Something else</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel agent advertising of trip package</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising / sponsorship directly promoting the destination</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport company (e.g. airline, hotel group) promoting special offer</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None of the above</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Which of these prompted your interest in this destination for your holiday in 2014?

Respondents were asked what prompted their interest in a destination for their upcoming holiday in 2014. Continuing the ‘creatures of habit’ theme, ‘previous experience of a destination’ was the strongest driver, with almost half of holiday makers saying this prompted their interest. Again, this was particularly strong amongst the older generation.

Peer endorsement is the second most important prompt, around a quarter (24%) prompted to book their destination by recommendations from friends. Recommendation from friends was a stronger reason amongst younger age groups, amongst whom social influence and higher use of social networking sites has a stronger impact on their decision making.
Older generation significantly more likely to check for financial protection and regulation

The majority of British holiday makers agree that they check what financial protection they have (57%) and whether the company they book with is affiliated to a regulatory body such as ABTA or Atol (58%). Around half (48%) agree that they assume that the companies they book with are affiliated to a regulatory body.

Propensity to check protection and affiliation differs considerably across age groups. 50% of 20-34s check what financial protection they have versus 67% of 55-64s. Similarly 49% of 20-34s agree that they check that the company they book with is affiliated to a regulatory body versus 68% of 55-64s.

The younger generations have been brought up in an era where consumer rights are better protected and regulation is less of a concern. Indeed, 55% of 20-34s agree that they assume the companies they book with are affiliated to a regulatory body compared to 46% of 55-64s. The trend may be driven by the type of holiday the younger generation takes, a higher proportion than other age groups intending to go on package holidays in 2014.

How much do you agree or disagree with the following statements?

Source: Q36.
## Increase in influence of websites and friends/colleagues on holiday decision making process

<table>
<thead>
<tr>
<th>Source of Information</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any website (excl. social media)</td>
<td>55</td>
<td>45</td>
<td>47</td>
</tr>
<tr>
<td>Talking to friends / colleagues / relatives</td>
<td>38</td>
<td>32</td>
<td>31</td>
</tr>
<tr>
<td>Any advertising</td>
<td>27</td>
<td>23</td>
<td>29</td>
</tr>
<tr>
<td>Any social media (inc. review sites)</td>
<td>25</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>Any brochure</td>
<td>23</td>
<td>25</td>
<td>21</td>
</tr>
<tr>
<td>Any PR / articles on destination</td>
<td>11</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Travel agent staff</td>
<td>10</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>9</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

Thinking about your 2013 holiday, which of these sources of information influenced your decision to book? And which of these sources of information influenced your decision to book this holiday?

There was a significant rise in the importance of online channels in holiday decisions in 2013. The influence of ‘talking to friends/colleagues’ has also risen - driven by younger age groups who are most responsive to improvements in technology and communications channels such as instant messaging.

Although there are fluctuations in influences such as ‘advertising’, ‘social media’ and ‘brochures’ these are not significant, but are worth monitoring in next year’s data.
Hotel/Resort website and search engines biggest movers in online influence

Social media is still the dominant channel for influencing holiday decisions, but this has dropped a little since 2013. Review sites such as TripAdvisor make up the largest portion of the ‘Social media’ influence (17%), although their importance - and consequently social media’s influence in general - has declined slightly since last year (see social media and review sites section). Conversely, there has been a slight rise in the influence of hotel/resort websites.

Travel guide websites, e-newsletters / email shots and transport carrier websites continue to hold secondary importance in the holiday decision making process.
Some upward movement in the influence of advertising on the holiday decision-making process

Although there have not been any significant jumps, the claimed increase in the influence of advertising in the holiday making decision is driven by movement in the influence of TV and press advertising, and a slight increase in the influence of online advertising.
The influence of websites is strong across all age groups. Younger generations (20-34) are significantly more influenced by word of mouth and range of communications channels, particularly ‘advertising’ and ‘PR/articles’ on a destination. Older generations are more impervious to the influence of advertising/marketing channels, perhaps due to the dominance of previous experience on their holiday making decision.
Families tend to be more risk-averse and price sensitive when planning any leisure activities, and therefore the more active researchers before a day out. As a result, they are generally exposed to a wider range of information/marketing sources than adult-only parties. This is most notable with the influence of advertising (35% v 24%), social media/review sites (29% v 23%) and PR/articles on a destination (15% v 9%).

Although the overall influence of websites is as high as amongst adult-only groups, families tend to be more ‘rigorous’ and consult a higher number of websites. For example:

- 19% families v 16% adult-only parties consulted review sites for their 2013 main holiday
- 12% v 6% price-comparison sites
- 12% v 7% specialist online travel websites e.g. expedia
- 12% v 8% other travel agent websites

Interestingly, adult-only groups are slightly more influenced by travel agents and guidebooks than families are when making their holiday decisions.
Traditional information sources such as brochures/leaflets drive C2DE holiday decision

Brochures/leaflets are more influential in the holiday decision making process amongst C2DEs - this is driven almost exclusively by the proportion who picked up a brochure at a travel agent/shop (16% of C2DEs having done so compared to 8% ABC1s); a result of less ‘office-based’ job roles driving more traditional influences of communication?

ABC1s are more influenced by social media, PR / articles on the destination, and guidebooks.

Thinking about this holiday, which of these sources of information influenced your decision to book this holiday?

Any website Word of mouth Advertising Brochure/Leaflet Social Media (inc. review sites) Travel agent PR / articles on destination Guidebooks

Social grade (%)

<table>
<thead>
<tr>
<th>Source</th>
<th>ABC1</th>
<th>C2DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any website</td>
<td>56</td>
<td>53</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>37</td>
<td>40</td>
</tr>
<tr>
<td>Advertising</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Brochure/Leaflet</td>
<td>20</td>
<td>29</td>
</tr>
<tr>
<td>Social Media (inc. review sites)</td>
<td>27</td>
<td>21</td>
</tr>
<tr>
<td>Travel agent</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>PR / articles on destination</td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>Guidebooks</td>
<td>11</td>
<td>5</td>
</tr>
</tbody>
</table>
Social media and review sites
Trust in review sites still strong, but has dropped since 2013

The 2014 survey reports a decline in trust in review sites since 2013 (45% agreeing they trust online review sites to be an accurate reflection of the place compared to 52% in 2013). The reduction in positive sentiment is also evident in agreement that people take more notice of online review sites than star ratings (46% from 50% in 2013).

A decline in trust of review sites is perhaps driven by the changing nature of sites such as TripAdvisor which in providing a booking facility as well as the option of reading or writing reviews, have adopted a role closer aligned to the travel agent. Has this movement reduced perceptions of their independence and authenticity?

How much do you agree or disagree with each of these statements about online review sites such as these?

<table>
<thead>
<tr>
<th>Statement</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>I trust online reviews to be an accurate reflection of the place</td>
<td>8</td>
<td>11</td>
</tr>
<tr>
<td>I take more notice of online review sites than star ratings for UK</td>
<td>14</td>
<td>18</td>
</tr>
<tr>
<td>accommodation</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Individual comments are more useful than the overall rating of the place</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>Will change a decision to visit after reading negative reviews</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>31</td>
</tr>
</tbody>
</table>

Strongly agree (%)  
Slightly agree (%)
Use of online review sites has dropped since 2013

How often do you use online review sites when deciding where to go on holiday?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always, for every holiday I take</td>
<td>15</td>
<td>17</td>
<td>14</td>
</tr>
<tr>
<td>Most of the holidays I take</td>
<td>18</td>
<td>24</td>
<td>19</td>
</tr>
<tr>
<td>Occasionally, for some of the holidays I take</td>
<td>31</td>
<td>31</td>
<td>28</td>
</tr>
<tr>
<td>Never</td>
<td>37</td>
<td>28</td>
<td>39</td>
</tr>
</tbody>
</table>

And which of these sources influenced your decision to book your main 2013 holiday?

<table>
<thead>
<tr>
<th>Source</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY SOCIAL MEDIA (inc. review sites)</td>
<td>25</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>Review sites e.g. TripAdvisor, TravelBlog, Cruise Connection</td>
<td>17</td>
<td>20</td>
<td>13</td>
</tr>
<tr>
<td>Social networking – viewing photos / videos</td>
<td>8</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>Social networking – reading comments</td>
<td>6</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>

A decline in trust in review sites is mirrored by a drop in holiday-makers who use review sites for most/all of the holidays they take (33% compared to 41% in 2013) and for those whom review sites was an influence on their main holiday since 2013. That said, the influence of review sites remains higher than in 2012.

There has been a slight rise in the influence of social media.
Review sites more important for holidays to Europe/Med

### Destination / holiday type (%)

<table>
<thead>
<tr>
<th>ANY SOCIAL MEDIA (inc. review sites)</th>
<th>Any social networking</th>
<th>Online review sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>22</td>
<td>12</td>
</tr>
<tr>
<td>Europe / Med</td>
<td>27</td>
<td>8</td>
</tr>
<tr>
<td>All inclusive / package</td>
<td>27</td>
<td>11</td>
</tr>
<tr>
<td>Independent</td>
<td>29</td>
<td>12</td>
</tr>
</tbody>
</table>

And which of these sources influenced your decision to book this holiday?

The role of social media is similar across holiday types but there is variation depending on the holiday destination. Taking the two most popular holidaying areas for 2013 (UK and Europe/Med), social networking is more of an influence for UK holidays - perhaps due to the relative ease of actioning social network recommendation closer to home.

Review sites are a greater influence for holidays outside of the UK - holiday-makers requiring more reassurance on their decisions.
Influence of social networks peaks at 25-34 years; review sites 35-54

**Age (%)**

<table>
<thead>
<tr>
<th>Age (yrs)</th>
<th>ANY SOCIAL MEDIA (inc. review sites)</th>
<th>Any social networking</th>
<th>Online review sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>20–24 yrs</td>
<td>23</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>25–34 yrs</td>
<td>32</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>35–44 yrs</td>
<td>25</td>
<td>10</td>
<td>21</td>
</tr>
<tr>
<td>45–54 yrs</td>
<td>26</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>55–64 yrs</td>
<td>14</td>
<td>2</td>
<td>12</td>
</tr>
</tbody>
</table>

**ABC1**
- Any social media: 27%
- Online review sites: 19%

**C2DE**
- Any social media: 21%
- Online review sites: 14%

And which of these sources influenced your decision to book this holiday?

- 25-34 year olds are most likely to be influenced by social media on an overall basis, driven by social networking (19%) and review sites (17%). There is a notable drop-off in the influence of social networking beyond the 25-34 age bracket, 10% of 35-44 year olds influenced by it, 6% of 45-54s and 2% of 55-64s.

Conversely, 35-44s and 45-54s are the age groups most likely to be influenced by online review sites, although this drops off for 55-64 year olds.

Review sites are also a stronger influence for ABC1s.
Holiday-makers are most likely to use social networking sites whilst on holiday to find out what others are up to, around 1 in 5 using it for this purpose. Telling people about their holiday and sharing photos are done by around 1 in 10 (11%).

In line with review use pre-holiday, there has been a slight decline in the proportion who posted a review/comment on a review site after the holiday. There have been increases in the proportion who posted about their holiday on social networking sites and uploaded holiday photos or videos to a social media site.
Usage of Mobile Devices on Holiday
Smartphone use continues to increase

### Mobile devices used on last main holiday (%)

<table>
<thead>
<tr>
<th>Device Type</th>
<th>2014</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY MOBILE DEVICE</td>
<td>88</td>
<td>84</td>
<td>83</td>
</tr>
<tr>
<td>Any smartphone</td>
<td>65</td>
<td>58</td>
<td>51</td>
</tr>
<tr>
<td>Android</td>
<td>32</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Laptop</td>
<td>24</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>iPhone</td>
<td>24</td>
<td>19</td>
<td>18</td>
</tr>
<tr>
<td>Tablet</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular mobile phone</td>
<td>14</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>E-reader</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blackberry</td>
<td>7</td>
<td>11</td>
<td>14</td>
</tr>
<tr>
<td>Netbook</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Still thinking about the last main holiday you went on last year, which of these mobile devices did you use while you were away on this holiday?

The use of Smartphones on holidays continues to increase, almost two-thirds of holiday-makers having done so on their last main holiday. The continued decline in the regular mobile phone market is reflected in the use of regular mobiles on holiday.

The use of tablets on holiday is growing as they become increasingly prominent in day-to-day life, 1 in 5 respondents using one on their last main holiday.
Smartphone usage on holiday continues to grow amongst all age groups, with the exception of 20-24 year olds whose usage remains at the same level as last year.

Android usage is most prevalent amongst 25-34 year olds, and remains the most popular smartphone brand amongst respondents aged 25 and over. It is only amongst the 20-24 demographic that it is overtaken by the iPhone, with 36% of this age group using an iPhone whilst on holiday.

Still thinking about the last main holiday you went on last year, which of these mobile devices did you use while you were away on this holiday?
Increase in use of internet and apps on smartphones whilst on holiday

Mobile device use in summary (%)

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access internet</td>
<td>58</td>
<td>53</td>
<td>57</td>
</tr>
<tr>
<td>Phone calls</td>
<td>49</td>
<td>50</td>
<td>51</td>
</tr>
<tr>
<td>Access an app</td>
<td>58</td>
<td>53</td>
<td>57</td>
</tr>
<tr>
<td>Taking photos</td>
<td>58</td>
<td>53</td>
<td>57</td>
</tr>
<tr>
<td>Emails</td>
<td>40</td>
<td>52</td>
<td>59</td>
</tr>
</tbody>
</table>

While on this holiday, for which of these purposes did you use…(MOBILE DEVICE)?

As more holiday-makers take smartphones on their breaks, and hotels continually provide free Wi-Fi, use of mobile devices to access the internet continues to increase. Increased mobile functionality has also driven rise app use, taking photos and sending/receiving emails.
Increased smartphone functionality drives range of uses

Mobile device use: breakdown (%)

<table>
<thead>
<tr>
<th>Apps</th>
<th>57%</th>
<th>Communication</th>
<th>78%</th>
<th>Entertainment</th>
<th>39%</th>
<th>Internet Browsing</th>
<th>78%</th>
<th>Other</th>
<th>64%</th>
</tr>
</thead>
<tbody>
<tr>
<td>App – with internet</td>
<td>48%</td>
<td>Send / retrieve texts</td>
<td>43%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>App – no internet</td>
<td>32%</td>
<td>Phoning UK</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Email friends / family</td>
<td>45%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Phoning at destination</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Instant messaging</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work email</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work phone calls</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Listening to music</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Watching films</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Streaming videos</td>
<td>11%</td>
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<tr>
<td></td>
<td></td>
<td>Watching TV</td>
<td>12%</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Social networking</td>
<td>39%</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>For holiday info.</td>
<td>34%</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>For work purposes</td>
<td>11%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Other internet purposes</td>
<td>27%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Taking photos</td>
<td>58%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mobile banking</td>
<td>22%</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

While on this holiday, for which of these purposes did you use…(MOBILE DEVICE)?

With the mobile app market ever expanding to include more and more day-to-day, practical, in addition to gaming, apps, over half of respondents access apps on their phone whilst on holiday.

Taking photos on a mobile phone is also an increasingly important feature that people use on holiday (58% this year compared to 53% last year).
Maps and weather reports most used apps

Weather, maps and social networking are the most commonly used apps whilst on holiday, which is unchanged from last year.

People on an all-inclusive holiday are more likely to use apps for leisure purposes such as music, film/TV and games, whilst people on independent holidays are more likely to use the more ‘practical’ apps such as those for weather reports, maps, destination information and travel times / journey planning.
Thank you for reading Holiday Trends 2014. We hope you find it useful. For any further information or research requests please contact:

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About BDRC Continental

BDRC Continental is the UK’s largest independent market research agency. Established in 1991, we have built an unrivalled reputation as a full service consultancy, providing our clients with critical evidence-based intelligence to inform major business decisions. We are committed to providing our clients with excellent service throughout the research process - that’s why our clients keep coming back to us.

One of our main areas of specialism is the travel sector with deep expertise in:

- Culture, Tourism & Leisure
- Transport & Travel
- Hotels, Meetings & Hospitality

Using our proprietary research products and techniques such as Tracktion, ZMET and Service Intensity, we design, manage and report upon customer experience programmes, market segmentations to drive growth, loyalty scheme research, understanding decision-making processes and much more.

BDRC Continental is quality accredited (ISO 20252) and Members of the MRS (Market Research Society) Company Partner Scheme.

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Terms and Conditions

Conditions of Contract / 1

1. DEFINITIONS
In these conditions:-
1.1 “the Client” means the person, firm, company or organisation to whom the proposal is addressed.
1.2 “the Company” means Business Development Research Consultants Limited (and any of its subsidiaries) whose registered office is at Kingsbourne House, 229-231 High Holborn, London WC1V 7DA.
1.3 “the Contract Date” means the date of confirmation of contract.
1.4 “the Information” means all data produced pursuant to the provision of the Service, including but not limited to completed questionnaires, electronic media, the findings of the survey and the survey report or presentation.
1.5 “the Service” means the provision by the Company to the Client of the research and the information, details of which are set out in the survey confirmation.

2. FORMATION OF THE CONTRACT
2.1 These conditions shall form the basis of the contract between the Company and the Client. Notwithstanding anything to the contrary in the Client’s standard booking conditions, these conditions shall apply except so far as expressly agreed in writing by a person authorised to sign on behalf of the Company. Any variation to this contract in terms of techniques or sample shall not affect any of the other terms of this contract.
2.2 No servant or agent of the Company has power to vary these conditions orally.
2.3 Unless otherwise expressly stated in writing, all quotations and estimates by the Company are invitations to treat. The Client’s confirmation of commissioning is an offer which will be accepted by the Company posting its confirmation of contract.
2.4 The signature of the Client or its representative of this confirmation of contract shall constitute acceptance by the Client of these conditions. In the absence of signature by or on behalf of the Client of these conditions, the agreement of the Client by e-mail will constitute acceptance by the Client of these conditions.
2.5 The Company will provide the Service to the Client at the request of any representative of the Client unless otherwise instructed in writing by the Client.
2.6 The construction, validity and performance of these conditions and this contract shall be governed by English Law.
2.7 These conditions supersede all previous terms and conditions of contract issued by the Company.
2.8 These general conditions shall be subject to such special conditions as may appear in the letter.
2.9 In the event of any conflict, or apparent conflict, between the special conditions and these general conditions, the special conditions shall prevail.
2.10 All notices to be served hereunder shall be served by first class pre-paid post, facsimile message or e-mail at the registered office or principal trading address of the intended recipient. Notices shall be deemed served when they would ordinarily have been received in normal business hours according to the means of transmission of such notices.

3. CANCELLATION
3.1 The consent of the Company to cancellation or variation of the contract shall not in any way prejudice the Company’s right to recover from the Client full compensation for any loss or expense arising from such cancellation or variation on an indemnity basis.
3.2 Subject to any special conditions appearing in the survey confirmation, the Client may terminate the contract by giving not less than 1 month’s prior notice of termination.

3.3 In the event of termination of the contract prior to completion of the Service, the Client will be liable to pay that proportion of the fees (as set out in the survey confirmation letter) as represents all work carried out, expenses incurred and financial commitments entered into by the Company as at the date of termination of the contract in accordance with clause 3.2 above, such proportion to be calculated by the Company at its sole discretion.

4. PRICE
4.1 The fees set out in the survey confirmation shall apply only in relation to the techniques and sample description set out therein. Any alterations to techniques or sample proposed by the Client may, at the sole discretion of the Company, result in increased fees being payable.
4.2 The provision by the Client of inaccurate information in relation to the Service may result in an increase in the fees set out in the survey confirmation.
4.3 The fees are quoted exclusive of VAT which will be added to all invoices at the rate applying at the appropriate tax point, except as varied for export clients.
4.4 If, through any currency fluctuation, the sterling equivalent of the cost to the Company of any obligations incurred in respect of overseas work for the Client exceeds the cost reflected in the survey confirmation, the Company shall be entitled to charge for such obligations at the exchange rate which is in operation at the time remittance is made abroad.

5. PAYMENT
5.1 Unless the survey confirmation makes specific provision for phased payments, the fees payable in respect of the Service will be invoiced as [50% upon commissioning and 50% upon delivery of the information]
5.2 Invoices in respect of the Service are payable within 30 days of the date of the invoice.
5.3 The Company reserves the right to charge interest on overdue invoices at 3% per annum above the base rate from time to time in force of Barclays Bank PLC.
5.4 The Client shall not be entitled to set off against any amount payable under this contract any amount due by the Company to the Client under any other agreement.
5.5 Without prejudice to any other rights of the Company, if the Client shall fail to make punctual payments of any monies due under any agreement between the Company and the Client, the Company may at its option, either withhold the provision of the Service and/or the information, until the total indebtedness of the Client to the Company has been discharged, or cancel this contract.
5.6 The Company reserves the right at any time at its discretion to demand security for payments before continuing with the provision of the Service or delivering any of the information to the Client, notwithstanding any subsisting agreement to provide credit to the Client or any provision to the contrary contained in these conditions.

6. COPYRIGHT AND CONFIDENTIALITY
6.1 The copyright in the information and research design shall be and shall remain owned by the Company.
6.2 All of the information is confidential to the Company. To the extent that the information is given to the Client, the Client undertakes to take all reasonable precautions to maintain the confidentiality of the information and not to allow access to the information other than to:-
6.2.1 those of the Client’s employees who have reasonable need to have access to same; and
6.2.2 professional advisers to the Client (such as advertising agencies and P.R. Consultants) but only on the specific understanding that such professional advisers do not pass on or use any of the information for clients of theirs other than the Client.

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6.3 In the event of the Client wishing to publish all or any part of the information, the Client must obtain the prior written approval of the Company and must acknowledge the Company as the source of the published material, such approval not to be unreasonably withheld.

The information (in whatever form) shall at all times remain the property of the Company which may, at its discretion, destroy all or part of same after two years following the date of delivery of the information.

Any Research Plan or Research Proposal submitted to the Client by the Company before contract is agreed, is submitted on the understanding that it is for the Client's consideration only and that it will not be shown to any third party. The Client shall not be entitled to use such plan or proposal if the contract is not awarded to the Company.

Where the Company's name is associated with any public presentation or with any broadly circulated document relating to the information, the Client agrees that the Company shall have the right to publish relevant results and information about the research with its own interpretation, if the Company considers such publication necessary to correct a misleading impression or to protect its reputation.

7. CARRYING OUT OF THE SERVICE

7.1 In the event that the Company shall be commissioned to conduct a survey requiring interviewees to examine or use any products, the Client shall indemnify the Company against any action by any interviewee or third party relating to the description, presentation or use of such products whether or not the Client is the manufacturer, distributor or agent for such products.

7.2 Any alteration to techniques or sample sizes from those set out in the survey confirmation, proposed or acquiesced to by the Client, may result in the delivery of the Information being delayed.

7.3 The Company reserves the right to sub-contract all or any part of the Service, including but not limited to the research described in the survey confirmation, to recognised suppliers, but subject to the appropriate quality controls and to the prior notification to the Client of the intention to sub-contract.

7.4 If the Company is required by the Client to sub-contract any part or parts of the Service to a named sub-contractor or one or more named sub-contractor, no warranty can be given by the Company as to the quality of accuracy of such part or parts of the Service.

7.5 The Company will use its reasonable endeavours to deliver the information on or before the date stated as the Delivery Date in the survey confirmation but time of delivery of the Information shall not be of the essence specified.