World Travel Market 2015
Industry Report

Discover key trends from the WTM London Exhibition Floor

Views from 1,000 UK holidaymakers
Opinions from the travel industry
All the latest travel trends
FOREWORD

World Travel Market London, the leading global event for the travel industry, will – as it has done since its launch event in 1980 – host the global travel and tourism industry as it looks to agree business deals and discuss the current issues facing the sector.

WTM London 2015 will facilitate deals worth more than £2.5 billion in travel industry contracts from more than 1.1 million on-stand meetings between exhibitors and buyers from the WTM Buyers’ Club. The WTM Portfolio – which also includes Arabian Travel Market, WTM Latin America and WTM Africa – is the catalyst for deals worth more than £4 billion.

Despite this clear desire to conduct business, the industry faces many hurdles, but I am pleased to see the report finds a high level of industry optimism for 2015 and 2016.

World Travel Market has surveyed its key stakeholders – exhibitors, senior WTM Buyers’ Club members and visitors – to discover the central issues for the industry and the topics of conversations on the exhibition floor across the four days of WTM London 2015 (2 – 5 November).

The findings form the backbone for the World Travel Market 2015 Industry Report. They cover a range of issues from industry optimism, aviation, sports tourism, responsible tourism and booking patterns.

These results are put into context by comparison with a survey of more than 1,000 UK 2015 holidaymakers (all of whom took at least a seven-day summer holiday overseas or in the UK in 2015) revealing their booking and holidaying habits.

Simon Press

Senior Exhibition Director, World Travel Market
Report Research Background

The World Travel Market 2015 Industry Report is based on the findings of two independently conducted surveys in September 2015.

The first is a poll of 2,050 World Travel Market London stakeholders comprised of exhibitors (tourist boards and private sector travel industry organisations), the industry’s senior buyers from the WTM Buyers’ Club and travel trade visitors.

The second piece of research is a survey of 1,036 British holidaymakers (all of whom took a minimum seven-day summer holiday overseas or in the UK in 2015). A full cross section of the UK public in all regions and income brackets was surveyed according to Market Research Society’s guidelines.
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7. UK holidaymakers’ Experiences
1. Industry Optimism

6 out of 10 Brits took a holiday in 2015.

Senior industry professionals say the tourism industry will grow in 2016.

More than 4/10 senior industry professionals anticipate agreeing business deals of a greater monetary value than at WTM London 2014.

This will result in more than 1.1 million on-stand meetings and deals worth more than £2.5 billion signed and agreed.

6 out of 10 Brits took a holiday in 2015.
1. Industry Optimism

Industry optimism at World Travel Market London 2015 is high. More than 50,000 senior industry professionals will pass through the doors of ExCeL – London over the next four days (Monday 2 – Thursday 5 November) to negotiate and sign business contracts.

More than four out of ten (42%) of the senior industry delegates polled in the report anticipate agreeing business deals of a greater monetary value at WTM London 2015 than they did last year. This includes 12% that will sign ‘significantly more deals’. A further 48% expect to conduct around the same amount of business as at WTM London 2014.

Q. Compared to WTM London 2014, do you think you’ll sign fewer or more business deals at WTM London 2015?

(Industry Survey)

This will see WTM London host more than 1.1 million on-stand meetings with deals worth more than £2.5 billion agreed and signed.

Furthermore, almost eight out ten (79%) say the tourism industry will grow in 2016, with one in five believing there will be a significant increase in the global travel and tourism industry. Please find attached your proofs covering the above badges. Please ensure that the artwork is correct, checking all aspects of design, layout and paying particular attention to spelling. A further 54% predict their individual business will grow next year.
Q. To what extent do you expect the tourism industry to grow or decline in 2016?

However, fewer Brits took a holiday in 2015 than in 2014. Six out of ten (61%) Brits took a holiday of seven days or more either overseas or in the UK this year compared to 70% in 2014. The World Travel Market 2015 Industry Report had to ask 1,700 people to reach 1,036 holidaymakers. In 2014 researchers had to ask 1,410 people to get 1,011 holidaymakers. Put another way, four out of ten Brits have not taken a holiday in 2015. This figure is similar to 2011, during the aftermath of the global financial downturn, when the World Travel Market Industry Report had to ask 1,611 people to get 1,006 to say they had had a holiday that year – in other words 38% of UK people did not take a holiday in 2011.
2. Emerging Destinations

UK HOLIDAYMAKERS

50% INTERESTED IN VISITING MEXICO

16% INTERESTED IN VISITING IRAN

MORE THAN 1/2 OF UK HOLIDAYMAKERS INTERESTED IN VISITING MEXICO

3/10 INDUSTRY EXECUTIVES BELIEVE THEY WILL DO MORE BUSINESS IN IRAN NEXT YEAR

CHINA

2/3 OF INDUSTRY LEADERS PREDICT INCREASED BUSINESS IN CHINA IN 2016
Every year the World Travel Market Industry Report looks to highlight those emerging travel and tourism destinations and economies that will play a major role in the future of the industry.

This year the report looks at China, Mexico and Iran.

China looks set to take off as a tourism destination and expand as a source market in 2016. The travel industry is predicting a significant rise in business, while UK holidaymakers are expressing a strong interest to visit the country.

The number of trips from China increased by 11 million to 109 million in 2014 and the country looks poised to stay ahead as the largest source market in 2016, with two thirds of businesses surveyed (63%) predicting increased business in China next year – including almost one in three (28%) that predict a significant interest.

Interestingly, more than one in two UK holidaymakers expressed an interest in visiting China, making it the most popular long-haul destination – with almost two out of ten (18%) saying they were very interested and a third (33%) being quite interested.

More than 570,000 British nationals visit mainland China every year, but the pent-up desire to visit coupled with recent diplomatic and marketing partnerships, look set to boost this number.

President Xi Jinping and his wife were hosted by Queen Elizabeth II at Buckingham Palace in October, just a few weeks after a high-profile charm offensive in China by the British Chancellor.

The UK government also sealed deals to boost tourism links and promote British culture in China.

The culture secretary John Whittingdale, Arts Minister Ed Vaizey and Tourism and Sports Minister Tracey Crouch met their Chinese counterparts in London in September to agree a Memorandum of Understanding for tourism.

The deal will see the UK hold “an annual dialogue on tourism exchange with the China National Tourism Administration and increase strategic co-operation on tourism through improving travel connections between the UK and China and facilitating relationships between the UK and Chinese travel trade”.

The Chinese delegation of exhibitors can be found on stand AS766.
Mexico

Mexico is currently in the middle of a massive promotion of a ‘Dual Year’ with the UK which is seeing an exchange of culture between the two countries and is the second most popular long haul destination on 50%. 14% of UK holidaymakers are very interested in visiting the country with 36% quite interested.

Mexico – WTM London’s 2015 Premier Partner – has also had the increased global exposure of hosting the first Mexico City Grand Prix yesterday (Sunday 1 November). Furthermore, its exposure to a worldwide audience was increased by the release of the new James Bond film, Spectre, parts of which were shot in Mexico City.

The Mexican delegation of exhibitors can be found on stand LA300.

Iran

Iran and Britain have restored diplomatic relations this year, which could lead to a boost in UK holidaymakers visiting the country. Iran boasts the most UNESCO world heritage sites in the whole of the Middle East, so there’s plenty to visit for overseas tourists.

Furthermore, the largest delegation of Iranian private and public sector is in attendance at WTM London this year to agree deals with tour operators and travel agents to bring overseas tourists to the country. This is on top of a number of multinational companies that have expressed an interest in developing the country’s tourism infrastructure.

One in six UK holidaymakers has expressed an interest in visiting the country, which is a significant percentage for a country that has been off the tourism map for so long.

Moreover, one in three industry executives expect to do more business in Iran next year.

Last month, UK tour operator Cox & Kings announced it would start selling holiday to Iran in 2016.

The Iranian delegation can be found on stand ME440.
Q. How interested are you in visiting the following countries in future?

(Holidaymakers Survey)

<table>
<thead>
<tr>
<th>Country</th>
<th>Very interested</th>
<th>Not very interested</th>
<th>Quite interested</th>
<th>Not at all interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>18%</td>
<td>33%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>India</td>
<td>15%</td>
<td>27%</td>
<td>20%</td>
<td>38%</td>
</tr>
<tr>
<td>Mexico</td>
<td>14%</td>
<td>36%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>13%</td>
<td>30%</td>
<td>20%</td>
<td>37%</td>
</tr>
<tr>
<td>Egypt</td>
<td>12%</td>
<td>31%</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>Uganda</td>
<td>5%</td>
<td>11%</td>
<td>22%</td>
<td>62%</td>
</tr>
<tr>
<td>Iran</td>
<td>4%</td>
<td>12%</td>
<td>17%</td>
<td>67%</td>
</tr>
</tbody>
</table>
MORE THAN EIGHT IN TEN

Seniors in the旅游行业认为该行业正在做正确的事情来减少其对气候变化的贡献，其中8%认为该行业已经做得足够多。

52% OF UK HOLIDAYMAKERS BELIEVE THE INDUSTRY IS DOING RIGHT AMOUNT TO REDUCE ITS CONTRIBUTION TO CLIMATE CHANGE, WITH 8% SAYING THE INDUSTRY IS DOING MORE THAN ENOUGH

Yet, only 4% offset the carbon emissions of every flight they take.

6/10 OF UK HOLIDAYMAKERS SAY THEY ARE ENVIRONMENTALLY AWARE WHEN ON HOLIDAY.

8 IN 10 MORE THAN SENIOR INDUSTRY PROFESSIONALS SAY THE ENVIRONMENT IS IMPORTANT TO THEIR ORGANISATION.
3. Responsible Tourism

World Travel Market London has been a strong supporter of responsible tourism through its World Responsible Tourism Day and Programmes, which have been a key part of WTM London for the past decade.

World Responsible Tourism Day (WRTD) (pictured) is the largest day of responsible tourism action in the world, as the industry comes together to both act and discuss the issues within responsible tourism.

More than eight out of ten senior industry professionals say the environment is important to their organisation, including 38% that say it is ‘very important’.

More than one in two (52%) of UK holidaymakers agree, stating the industry is doing the right amount to reduce its contribution to climate change.

Four out of ten industry executives believe it is out-performing other industries in its commitment to climate change. This is illustrated by several best practice organisations in the industry, including Europe’s largest travel company Tui.
Tui has recently launched a five-year strategy that will see it invest £7.5 million a year to deliver ten million ‘greener and fairer’ holidays. This includes a 10% reduction in the carbon intensity of its operations by 2020. Tui has already seen ten million customers stay in sustainable certified hotels between 2012 and 2014.

Further good examples of responsible tourism can be found among the finalists of the World Responsible Tourism Awards at WTM. This will take place on Wednesday November 4 at 10.30am in Platinum Suite 3 & 4.

UK holidaymakers appear to want to experience sustainable holidays with six out of ten (61%) saying environment and sustainability is important in their choice of holiday. Also more than eight out of ten (81%) say they consider the environment when on holiday. However, only 4% offset the carbon emissions of every flight they take – with three quarters not offsetting any flights they take. Despite this, three out of ten claim they would be willing to spend more to reduce the environmental impact of their holiday.
Q. Whilst on holiday, do you consider any of the following to minimise your impact on the environment...?

(Holidaymakers’ Survey)

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting local tourist attractions</td>
<td>61%</td>
</tr>
<tr>
<td>Adhering to hotel policies of re-using bath towels</td>
<td>52%</td>
</tr>
<tr>
<td>Buying local produce and / or souvenirs</td>
<td>52%</td>
</tr>
<tr>
<td>Using public transport for travel</td>
<td>44%</td>
</tr>
<tr>
<td>Other*</td>
<td>2%</td>
</tr>
<tr>
<td>I do not consider the environment when on holiday</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Caps on Tourism Numbers**

In 2015 the number of global trips will be above 1 billion for the fourth year in a row. With the number of tourists continuing to increase, this is putting a lot of pressure on the most popular tourism destinations.

Barcelona is poised to introduce a cap on the number of tourists entering the city. In April this year, the city announced a ban on tourists groups of more than 15 people in the iconic La Boqueria market on La Rambla boulevard.

Other destinations and attractions that are looking at limiting tourism numbers include the Canary Islands and Machu Picchu.

Nearly two-thirds (65%) of the industry agreed with the statement that “tourism caps are a practical solution to the problems of overcrowding”. A further 18% were unsure with 17% disagreeing.

However, while the majority think tourism caps are a useful tool, the industry is divided about whether capping is actually a good idea in practice. When asked whether caps would be a good thing for their own city/company/destination, only 36% agreed with 34% disagreeing.
Popular destinations such as the Disney resorts, Barcelona, Venice, and Machu Picchu have tried introducing measures to manage visitor numbers. Do you think tourism caps are...?

(Above) Tourists disrupted the nesting ritual of these turtles in Costa Rica.

Q. A practical solution to the problems of overcrowding

Yes 65%

No 17%

Don't know 18%

Would benefit your city/destination/company

Yes 36%

Not sure/Don't know 30%

No 34%

(Industry Survey)
4. Sports Tourism

84% of the trade believe major sporting events have a positive effect on the host’s tourism industry...

...with Rio Olympics and Paralympics receiving the greatest positive effect.
There is a big debate in the travel industry regarding the impact that hosting a major sporting event – such as the Olympics and the football FIFA World Cup – has on the tourism industry of that destination.

Some argue it is the best ‘shop window’ for a city or country to show off its culture and tourism attractions, which boosts the tourism industry for years to come.

Others feel it has a detrimental effect on tourism numbers: instead of encouraging, it can put tourists off visiting before, during and after the sporting event.

The European Tour Operators’ Association is among those dubious about the tourism benefits of hosting a major sporting event. It claims Australia suffered a dip in tourism for three years after the 2000 Sydney Olympic Games, while inbound tourist numbers to New Zealand grew during the same period. Furthermore, arrivals into Greece lagged behind fellow eastern Mediterranean countries Turkey and Croatia after the 2004 Athens Olympic Games.

However, the London Olympics demonstrated how a country’s tourism industry can benefit from hosting a major sporting event. In 2013, the UK welcomed almost 33 million (32.8 million) overseas visitors, compared to just over 31 million in 2012 – the year of the London Olympics, and 30.8 million in 2011.

The industry believes recent and future major sporting events will have a positive effect on the destinations’ tourism industries, with 84% predicting a rise in visitors.
It is felt next summer’s Olympics and Paralympics Games in Rio will have the greatest impact with six out of ten industry professionals predicting a rise in visitors following the event. France’s hosting of the 2016 football UEFA European Championship was second on 43%. However, almost two thirds of the industry didn’t feel the UK’s hosting of the recent Rugby World Cup – which concluded at the weekend – would lead to an increase in tourists.

Q. As a result of hosting major sporting events, which of the following countries do you expect to see an increase in bookings to...?

(Industry Survey)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brazil – following the 2016 Olympics</td>
<td>60%</td>
</tr>
<tr>
<td>France – following UEFA Euro 2016</td>
<td>43%</td>
</tr>
<tr>
<td>UK – following the 2015 Rugby World Cup</td>
<td>35%</td>
</tr>
<tr>
<td>Mexico – following its first Formula 1 race</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t expect to see an increase in bookings for any of these countries</td>
<td>16%</td>
</tr>
</tbody>
</table>

The success of the London 2012 Olympics may prove to be the exception to the rule. When UK holidaymakers were asked what impact future major sporting events would have on the host destination it was universally negative.

The events highlighted all had a minus net likelihood of UK holidaymakers visiting, with the Qatar 2022 football World Cup faring the worst with a score of -21%.
Q. Has the hosting of a major sporting event made you more or less likely to visit each of the following locations...

(Holidaymakers’ Survey)

<table>
<thead>
<tr>
<th>Location</th>
<th>Much more likely</th>
<th>A little more likely</th>
<th>Makes no difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rio de Janeiro, Brazil (2016 Olympics)</td>
<td>14%</td>
<td>7%</td>
<td>4% 19%</td>
</tr>
<tr>
<td>France (UEFA Euro 2016)</td>
<td>12%</td>
<td>56%</td>
<td>5% 21%</td>
</tr>
<tr>
<td>Russia (2018 FIFA World Cup)</td>
<td>9%</td>
<td>56%</td>
<td>4% 26%</td>
</tr>
<tr>
<td>Mexico (Formula 1)</td>
<td>8%</td>
<td>62%</td>
<td>5% 21%</td>
</tr>
<tr>
<td>Qatar (2022 FIFA World Cup)</td>
<td>7%</td>
<td>58%</td>
<td>4% 27%</td>
</tr>
</tbody>
</table>

ETOA CEO Tom Jenkins said: “Large sporting occasions are often touted as having two tourism impacts: during the period of the event and a ‘legacy’ of increased demand thereafter. Both are usually misunderstood.

“It is too early to say what influence the Rugby World Cup has had on the tourism industry. Anecdotally, demand for London is dipping and so groups of supporters have been absorbed relatively easily.

“This has occurred partly because there has been an absence of the disruptive hype we saw during the Olympics. As for a ‘legacy’ of increased demand for the UK as a destination, we can be confident that there will be none.

“There never has been from such events, nor is there likely to be. People watch sport because they are drawn to the sporting event. This interest ends with the final whistle.”

VisitBritain Director Patricia Yates responded: “Rugby World Cup 2015 has seen record demand for tickets and we anticipate an extra 466,000 overseas visitors came to Britain during the tournament – more than any previous Rugby World Cup.

“Tournament visitors are expected to contribute up to £869 million in direct expenditure to the UK economy.

“It is a truly global sporting event attracting significant volumes of visitors from Australasia, Africa, North America and Europe staying up to 24 nights across the 11 host cities and regions, including places which wouldn’t necessarily be on the immediate radar for many of our overseas visitors, including Gloucester, Leicester and Exeter.”
“Overall, Rugby World Cup 2015 is expected to contribute up to £2.2 billion of output to the UK economy and VisitBritain is working hard to capitalise on this global exposure and inspire legions of future tourists and investors from around the world to visit and to do business in Britain.”

(Above) Twickenham stadium, 2015 Rugby World Cup
5. Aviation

Less than 1 in 5 want to be able to make calls on planes.

83% of industry executives think no-frills long haul will take off.

More than 1/2 of UK holidaymakers will back Wi-Fi being available on planes.
5. AVIATION

Long-Haul Budget Airlines

Globetrotters are likely to see a low-cost long-haul revolution in aviation with eight out of ten (83%) senior trade executives tipping ‘low-cost transatlantic/worldwide flights’ (41% said ‘very likely’ and 42% ‘quite likely’) to take off.

Q. How likely are the following to be introduced within the next five years?

(Industry Survey)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Very likely</th>
<th>Quite likely</th>
<th>Not very likely</th>
<th>Not at all likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low cost transatlantic / worldwide flights (n: 1,948)</td>
<td>41%</td>
<td>42%</td>
<td>15%</td>
<td>2%</td>
</tr>
<tr>
<td>Greater airline consolidation (n: 1,838)</td>
<td>30%</td>
<td>58%</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>One size baggage policy (n: 1,829)</td>
<td>24%</td>
<td>38%</td>
<td>29%</td>
<td>9%</td>
</tr>
<tr>
<td>Travellers being charged to guarantee their hand luggage remains with them in the cabin (n: 1,785)</td>
<td>22%</td>
<td>39%</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Face-to-face seating on flights (n: 1,732)</td>
<td>6%</td>
<td>23%</td>
<td>43%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Cheaper fuel prices have helped reignite the battle of budget routes across the Atlantic – shaking up traditional low-cost models that rely on short-haul services with quick turnarounds.

Iceland’s WOW air will fly from the UK to Canada from May 2016 with one-way fares from £99. It follows the launch of WOW’s transatlantic services from Gatwick to Boston and Washington DC in early 2015.

The flights include a layover in Iceland’s capital, Reykjavik.

Other low fares are already available from the UK to US destinations from Norwegian, while elsewhere in Europe, budget carriers such as Germany’s Condor and Paris-based XL Airways France offer transatlantic routes.
Cheap fares are offered by Air Canada rouge and Air Transat, and WestJet will start non-stop services next spring to Gatwick from six Canadian cities.

Wego.com, a travel search site in Asia Pacific and Middle East, says globetrotters can now fly around the world just on low-cost carriers.

Dean Wicks, Chief Flights Officer for Wego, says: “It’s a backpacker’s dream come true.

“Indonesia AirAsia X has announced direct flights between Sydney and Bali, and AirAsia X has hinted at the possibilities of future flights from Australia to London and Hawaii.

“Scoot flies from Singapore to Australia, and Jetstar carries 8.5% of passengers travelling in and out of Australia to 17 international destinations in seven countries across Asia, North America and Oceania.

“Another great example is Norwegian, which fly from Bangkok to Europe, connects Europe with the US, and has just announced flights between the US and the Caribbean, beginning this Christmas.

“In the UAE, FlyDubai now serves a total of 94 destinations and has expanded with flights to home countries of many guest workers including Amman, Beirut, Chittagong, Kathmandu and Muscat.”

WOW air is exhibiting at World Travel Market London (stand EU840c), as are two Canadian carriers, WestJet and Air Transat (NA200).
Phone calls on planes

One of the last havens of peace from other people’s mobile phones – the aeroplane – looks set to be coming to an end with airlines planning to allow the use of handsets.

US airlines have already experimented with Wi-Fi on planes and now European carriers are following suit: Lufthansa signed a deal to allow passengers to use their handsets on board from next summer, and British Airways is expected to follow, making mobile usage the norm in Europe from the summer of 2017.

More than half of UK holidaymakers back Wi-Fi being available on planes, but they are against Wi-Fi being used to allow passengers to make calls, via apps such as WhatsApp and Facebook Messenger or by using FaceTime.

At the moment it is impossible to get a signal at 33,000 feet, however, technology is developing fast and a signal can be achieved at a lower altitude. Less than one in five of UK holidaymakers want to see phone calls on planes introduced with 63% of senior travel industry executives agreeing with them.

(Above) Phone calls on planes could soon be introduced
Q. Which of the following do you support?

(Holidaymakers’ Survey)

- Wi-Fi on planes: 52%
- Allowing phone calls on planes: 18%
- Neither of these: 44%
6. Booking Trends

- 3% of UK holidaymakers have used a peer-to-peer site to book travel.
- Holidaymakers check exchange rates before booking a holiday.
- More than 1 in 2 say affordability was very important when booking a holiday.
- 16% of organisations work with bloggers.
- 3% of UK holidaymakers have used a peer-to-peer site to book travel.
6. BOOKING TRENDS

UK Holidaymakers Remain Price Sensitive

The global financial downturn during the last decade saw holidaymakers focus on affordability and value of holidays. This saw a number of travel companies increase their all-inclusive offerings as this helped holidaymakers manage their holiday spending better.

This trend has continued as the world has slowly moved out of the downturn. Nine out of ten UK holidays cite affordability as a key influence when deciding whether to book a holiday. More than one in two (52%) say affordability is very important with a further 39% saying it is quite important.

Furthermore, UK holidaymakers are clearly keeping a keen eye on currency exchange rates with six out of ten (62%) saying they are important when deciding on whether to book a holiday – including a quarter that state exchange rates are very important.

Q. How important are the following factors when deciding whether to holiday in the UK?

(Holidaymakers’ Survey)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very important</th>
<th>Quite important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordability</td>
<td>52%</td>
<td>39%</td>
</tr>
<tr>
<td>Weather</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Terrorist threats</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Safety fears following recent plane</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Exchange rates</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Experience at airport security</td>
<td>22%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Other key factors behind booking holidays included weather – with eight of ten UK holidaymakers saying it is important and the increasing concern of terrorism threats following recent tragic events – with six out ten citing this concern as important. However, only 22% of UK holidaymakers consulted the Foreign and Commonwealth Office’s travel advice before booking – with only 12% of those saying it impacted their decision. Interestingly, 86% of the industry believes that the travel and tourism industry needs to have a greater influence on governments’ advice for tourists.

Q. Does the tourism industry need to have more of an influence on government advice given to tourists?

(Industry Survey)
The Sharing Economy

Peer-to-peer travel – holidaymakers staying in people’s homes booked through sites such as Airbnb, Housetrip and HomeAway – has grown incredibly fast.

Airbnb is expected to facilitate more than 80 million room nights booked this year – more than double its 2014 number of 40 million. The company has more than 1.5 million listings in more than 34,000 cities in 190 countries. Airbnb is the third most valuable venture capital-backed company in the US, valued at $25.5 billion. By comparison, Hyatt Hotels Corporation has a market value of $6.7 billion.

Interestingly though, despite these impressive numbers the peer-to-peer sector has – so far – had little impact on the traditional travel industry.

Only a quarter (26%) of the senior industry executives polled say the sharing economy had had a negative impact – with only 6% of those saying the negative impact has been significant. Six out of ten respondents said there had been no impact at all, while 16% said it has had a positive impact on the business.

(Above) Airbnb could facilitate more than 80 million room nights booked this year.
Q. What impact has the ‘sharing economy’ and peer-to-peer websites such as Airbnb, Onefinestay, Couchsurfing, Flipkey and Uber had on your organisation?

(Industry Survey)

The response from UK consumers is even more surprising. Only 3% of UK holidaymakers use a peer-to-peer site to book travel, although the vast majority (97%) of those that have used such a site say they would do so again.

Four out of ten people that have not used such a site would consider doing so in the future.

Interestingly, the findings mirror a recent survey which says only 19% of British consumers have heard of leading peer-to-peer accommodation provider AirBnB, with only 7% having used the service (Canadean, 2,000 UK consumers).
Q. Would you use a peer-to-peer website to book accommodation or travel / transport again?

(Holidaymakers’ survey)

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes – for accommodation</td>
<td>86%</td>
</tr>
<tr>
<td>Yes – for travel / transport</td>
<td>43%</td>
</tr>
<tr>
<td>No</td>
<td>3%</td>
</tr>
</tbody>
</table>

Blogging

It is estimated there are more than 152 million blogs on the internet, with a new blog being launched every half a second. Within this phenomenon, travel blogging has become highly popular in recent years. WTM London hosts around 500 bloggers every year who attend to meet with exhibitors to explore business opportunities. Last year, WTM London introduced a Bloggers’ Speed Networking event which saw 70 bloggers discuss business with 300 exhibitors over the hour-long session. This year’s event has been extended to 100 bloggers over 90 minutes and is sure to be even more popular with exhibitors.

(Left) The Bloggers’ Speed Networking event 2014. This year’s event is even bigger.
However, it appears that both the industry and UK holidaymakers have not yet realised the full potential of the blogging community. The World Travel Market 2015 Industry Report shows that only 16% of organisations work with bloggers while nine in ten (92%) respondents do not refer to blogs when researching holidays.

Q.  Do you refer to blogs as part of your research in booking a holiday?

(Holidaymakers’ survey)

Q.  Do you or your organisation work with any travel bloggers?

(Industry Survey)
Michael Ball – the founder of Traverse, which is World Travel Market London’s blogging partner – says the percentage of travel companies working with bloggers may still be small but has increased over the recent years.

“Sixteen percent of travel companies working with bloggers is much higher than it was a few years ago, but still shows just how far bloggers still have to come. While it seems a small number, it shows that there is still so much to be achieved, and that can be nothing but positive as we see more and more blogs founded each day,” says Ball. “Seeing that just 10% of holidaymakers refer to blogs should do nothing but encourage bloggers to continue to write for the reader and create engaging content that people will trust and want to share.”

Oliver Gradwell – the Director of World Travel Market blogging partner Wonder – says the results show how much the blogging industry has grown in the UK.

“It is a marker of just how far blogging has come within the travel industry, if 10% of UK holidaymakers are now using blogs when researching holidays,” he says. “Additionally, if ‘only’ 16% of travel companies are working with bloggers, then it provides an ideal opportunity for shows like World Travel Market to continue to provide market leading seminars and networking opportunities.”
7. UK Holidaymakers’ Experiences

4 out of 10 UK holidaymakers admit to being keen social media selfie posters while away.

61% of staycationers say fear of terrorism was an important factor in their choice of holiday.

More than 1 in 5 are very concerned about safety while on holiday.

64% of the industry’s senior leaders think selfies should be more closely monitored at tourism hotspots.
7. UK HOLIDAYMAKERS’ EXPERIENCES

Terrorist Attacks The Biggest Fear On Holiday

Terrorist attacks were the biggest fear for UK holidaymakers while on holiday this summer with four in ten unable to totally relax, following the attack on a Tunisia beach in June which saw 38 British holidaymakers killed. More than one in five (22%) were very concerned with a further 18% quite concerned. Of those that holidayed at home this summer six out of ten (61%) said the fear of terrorism was an important factor in their decision. Only affordability and weather were greater factors in their holiday destination choice.

Furthermore, more than a third (35%) was concerned about an influx of refugees and asylum seekers in resorts, with political instability cited by three in ten.

Q. How concerned were you about the following when you were on holiday?

(Holidaymakers’ Survey)
Should selfie sticks be banned?

A number of major tourism attractions – including Disney Parks – have banned the use of selfie sticks. Rome’s Colosseum is asking tourists to refrain from using the device.

Two-thirds (64%) of the industry senior leaders believe the use of selfies needs to be more closely monitored at tourism hotspots.

The industry’s move against the selfie stick is likely to upset UK holidaymakers with 40% admitting to be keen selfie-takers so they can upload the photos to social media while away. To demonstrate this further, if UK holidaymakers could take just one device away on holiday with them, then it would be the camera, beating among others, the tablet device and laptop.

Q. Should the use of Wi-Fi and taking of selfies be more closely monitored at tourism hotspots such as religious and sacred sites?

(Industry Survey)