



inspire

Trading Document, June 2025

How This Can Help You

We have collated data from our own systems, our marketing data and various polls/research documents to help you plan your forward thinking when planning how to market and trade in the coming months.

We have tried not to be stat heavy but try to personalise to the ITA business what trends are occurring and new things that we anticipate to set the trends well into late 2025 and early 2026.



December 2024 Recap

2024 was a big year for travel – 84% of people took a holiday, with an average of 3.9 holidays taken per person.

Top 5 Destinations Booked	Top 5 Destinations Searched	Top 5 Products Booked	Top 5 Suppliers Booked
Spain United States Greece Turkey United Kingdom	Dubai Antalya Tenerife Orlando Amsterdam	Tour Operator Hotel Cruise Attraction Tickets Flight Only	Jet 2 Holidays Thomson Holidays Easyjet Holidays Aviate Bedsonline



What We Have Seen in 2025?

Cruise sales have increased by 48% and Luxury by 71%, based on year on year revenue. This is higher than the standard 18% increase we have seen.

Our standard destinations Spain / UK / France have been relatively flat. Therefore, we have focused on certain destinations all of which have outperformed normal growth.

Best growing destinations:

Thailand	91% Growth
Morocco	39% Growth
Turkey	35% Growth
UAE	46% Growth
USA	45% Growth
Greece	38% Growth
Maldives	58% Growth
Barbados	83% Growth

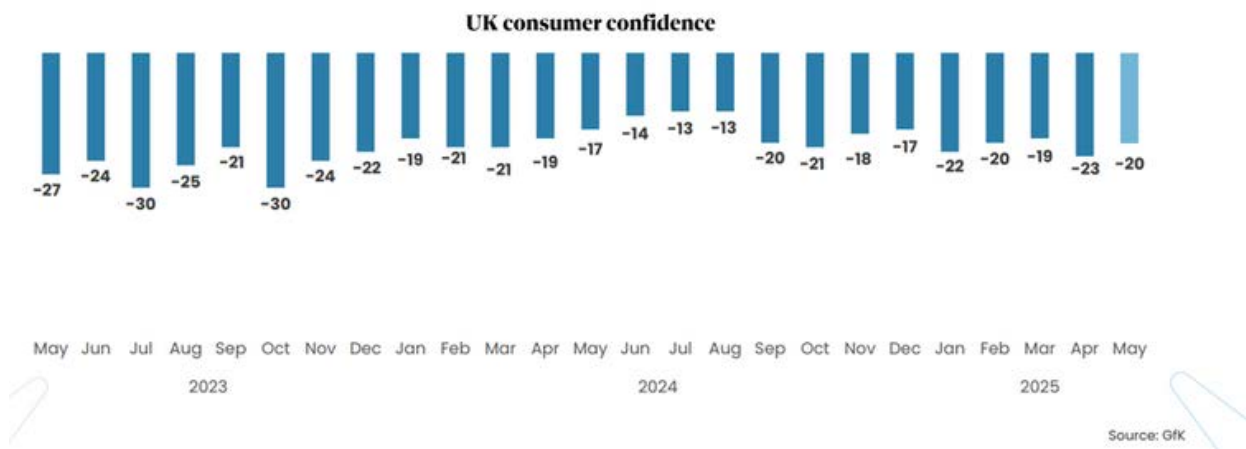


Consumer Confidence

This maintained steadily throughout the year & we did see a spike in May

Confidence increased 3 points in May

While the US tariffs remain a concern, consumers were more positive about the economy than in April.



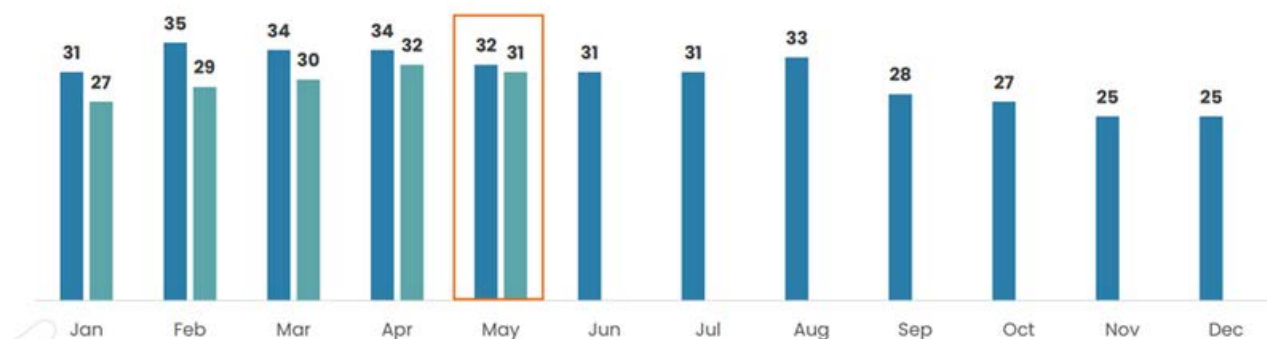
Travel Booking Industry Numbers

Travel bookings were slightly down year-on-year

Additionally, the percentage of people booking a holiday also dropped 1% month-on-month.

% booked a holiday in the previous 3 months

■ 2024 ■ 2025



Source: Mintel

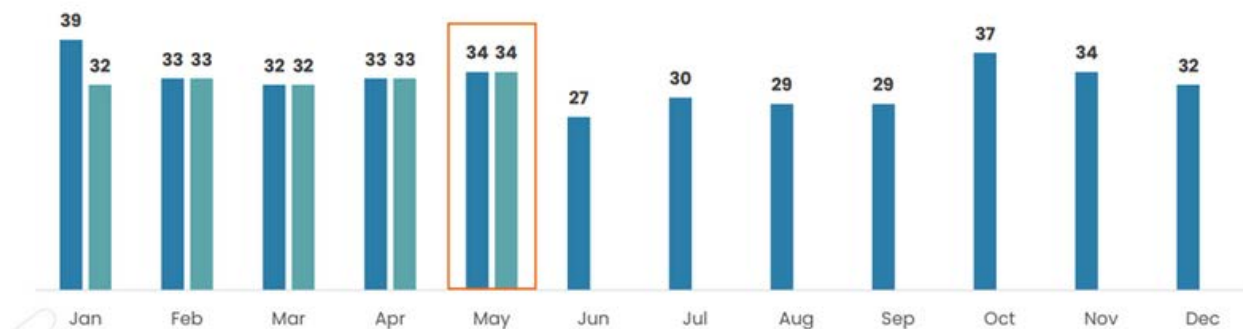
Customer Plans

But plans to holiday have remained stable year-on-year

However, compared to April, more people are planning to book a holiday in the next 3 months.

% plan to book a holiday in the next 3 months

■ 2024 ■ 2025



Source: Mintel

Social Media : An Effective Way to Communicate with your Customers

The likeliness of selling through social media is high, with many factors contributing to its effectiveness. Social media allows businesses to reach a vast audience, build brand awareness, and directly engage with potential customers, ultimately driving sales and conversions.

Reach and Audience Engagement:

- Social media platforms offer businesses the ability to reach millions of potential customers with a single post.
- Businesses can build a strong following by sharing engaging content, interacting with users, and running targeted ads.
- Social media enables direct communication with customers, fostering relationships and building trust.

Increased Awareness and Brand Recognition:

- Social media marketing can help businesses increase brand awareness and recognition, making them more visible to potential customers.
- Consistent engagement and valuable content can help a business establish itself as a leader in its industry, attracting more followers and leads.
- Brand recognition can lead to higher sales and conversions as customers become more familiar with and trust the brand.

Positive Customer Experiences and Word-of-Mouth:

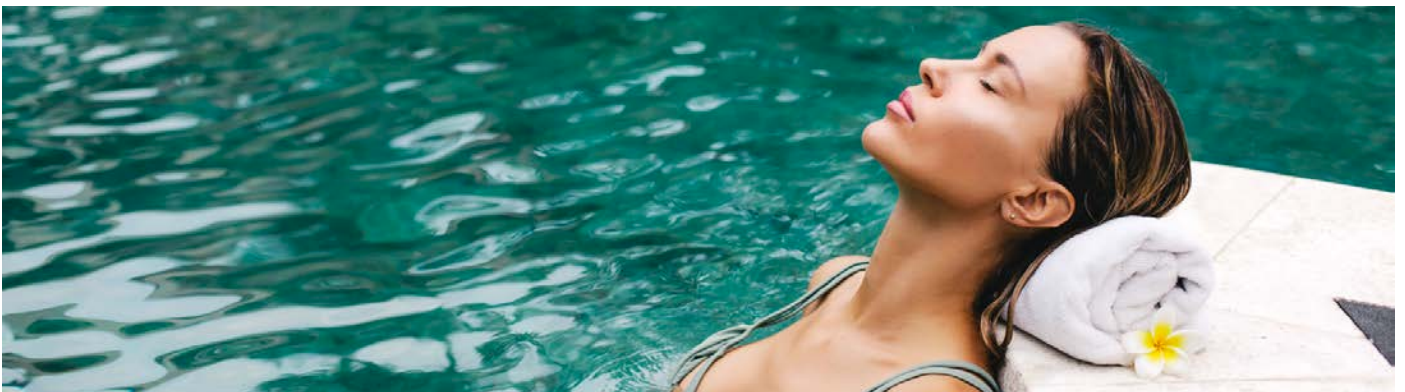
- Social media provides a platform for businesses to interact with customers and build strong relationships.
- Positive customer experiences on social media can lead to increased brand loyalty and positive word-of-mouth referrals.
- Satisfied customers are more likely to recommend a brand to their friends and family, generating new leads and sales.

Overall, the likeliness of selling through social media is high because it provides businesses with the tools and strategies to reach a vast audience, build brand awareness, and drive sales in a cost-effective way.



Trends Shaping the Industry

- Sustainable travel: 78% of consumers prioritise eco-friendly options; nearly 50% expect hotels to enforce green practices—but unwilling to pay premiums.
- Digital transformation: ~80% of bookings done online, mobile platforms growing rapidly. Use of generative AI for trip planning is accelerating.
- Experiential & personalised: Growth in “calmcations,” noctourism, wellness, food-led travel, and remote-work vacations

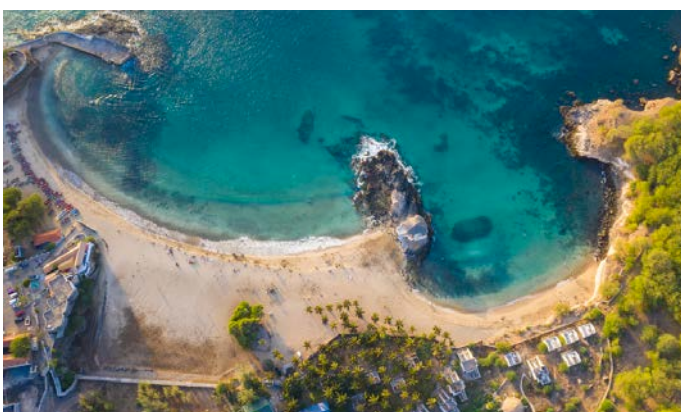


What Patterns are Trending? – Destinations and Holiday Types

As we look ahead to 2026, UK holidaymakers are expected to continue their evolving travel preferences, balancing traditional favourites with emerging destinations offering better value and unique experiences.

Long Haul and Emerging Destinations

- Thailand remains a top choice, with over 69,000 monthly searches from the UK, driven by its tropical allure and affordability.
- Turkey continues to captivate with its rich history and coastal beauty, securing the second spot with approximately 27,000 monthly searches.
- Cape Verde has surged in popularity, ranking third with over 25,000 monthly searches. Its appeal lies in its affordability and year-round sunshine.
- South Africa is gaining traction, especially Cape Town, known for its scenic landscapes and value-for-money offerings



European Favourites

- Spain remains a staple, with destinations like Palma, Malaga, and the Canary Islands offering a mix of culture, cuisine, and beach relaxation.
- Greece, particularly islands like Santorini and Corfu, continues to enchant with its picturesque settings and historical sites.
- Portugal is on the rise, with Madeira and Faro offering a blend of natural beauty and cultural experiences.
- Tunisia is emerging as a budget-friendly alternative, with new routes from UK airports making it more accessible.



Winter Sun Escapes

- Cape Town, South Africa

Cape Town is emerging as a top-value long-haul destination, offering warm weather, no time difference, and affordable luxury. Budget airline Norse Atlantic Airways is expanding flights from London Gatwick, making it more accessible than ever.

- Morocco (Marrakech & Agadir)

Morocco is experiencing a surge in popularity, with Marrakech and Agadir leading the charge. British tourists are drawn to the country's rich culture, mild climate, and cost-effective travel options.

- Maldives

The Maldives continues to captivate with its overwater bungalows and crystal-clear waters. Brits are flocking to islands like Olhuveli and Male, where hotel prices have dropped by up to 60% compared to last year.

- Sri Lanka

From December to March, Sri Lanka's southern coast offers clear skies and warm temperatures, ideal for beach lovers and wildlife enthusiasts. The dry season coincides with whale watching season, providing unique opportunities to spot dolphins and humpback whales.



Festive & Winter Wonderland Adventures

- Rovaniemi, Finland

Known as the "Hometown of Santa Claus," Rovaniemi offers a magical winter experience with opportunities to see the Northern Lights, visit Santa's Village, and enjoy snow activities.

- Shymbulak, Kazakhstan

As Central Asia's largest ski resort, Shymbulak near Almaty boasts excellent snow conditions and fewer crowds, making it a hidden gem for winter sports enthusiasts.

- Strasbourg, France

Dubbed the "Capital of Christmas," Strasbourg's festive markets have seen a 670% increase in searches, making it the most trending European destination this winter.

- Gothenburg, Sweden & Poznan, Poland

Both cities have gained popularity for their enchanting Christmas markets and festive atmospheres, offering a delightful alternative to traditional holiday destinations



Cruise : Shifting Demographics and Travel Preferences

The average age of UK cruisers has decreased to 55.1 years, down from 56.1 in 2022.

Additionally, 57% of passengers are now traveling in multigenerational groups, indicating a shift towards family-oriented cruising .

There is also a growing interest among solo travellers, with searches for "solo cruise holiday" increasing by 136% over two years



Cruise : Expanding Destinations and Unique Experiences

UK cruise passengers are exploring a wider range of destinations.

The Mediterranean remains the top choice, but there is a notable rise in interest for exploration destinations, which saw a 53% increase in passenger numbers year-on-year.

Innovative itineraries, such as themed cruises and expedition voyages to remote locations like Antarctica and the Galápagos, are gaining popularity



Cruise : Focus on Sustainability

Environmental consciousness is influencing cruise choices, with many passengers seeking sustainable travel options.

Cruise lines are responding by adopting greener technologies, including LNG engines and battery packs, to reduce their environmental impact.

Cruise : Outlook for 2025 and Beyond

The UK cruise market is projected to continue its growth, with revenues expected to reach €2.89 billion in 2024 and 3.17 million users by 2029 . The industry's expansion is supported by infrastructure developments, such as the £6 million upgrade at the Port of Dover to accommodate larger cruise ships .

In summary, cruising is becoming a more attractive and accessible option for UK tourists, driven by diverse offerings, improved infrastructure, and a focus on sustainability.



Staycation and Eco Friendly Options

Emerging Travel Trends in staycation travel:

New travel trends include:

- **Shorter, Frequent Breaks:** Many are opting for long weekends to maximize time off.
- **Unique Accommodations:** Stays in pods, yurts, and shepherd's huts are becoming more popular.
- **Off-the-Beaten-Path Destinations:** Regions like Somerset and Argyll and Bute are gaining interest for their less touristy appeal.
- **Experience-Based Travel:** Activities such as wild swimming, cave exploration, and llama hiking are trending.

Destinations to visit:

- The Lake District is drawing eco-conscious travellers with its sustainable tourism initiatives and cultural events.
- The Cotswolds offers immersive experiences like foraging and pottery workshops, appealing to those seeking a slower pace.
- Galway, Ireland is becoming a cultural hotspot, with festivals and access to the scenic Wild Atlantic Way.



Final Take : Outlook for the rest of 2025/26

The UK travel industry is rebounding strongly in 2025—international inbound travel, domestic outbound, and business travel are all trending upward.

However, persistent costs, economic stagnation, policy hurdles, and global instability are limiting further upside.

Ongoing success depends on businesses investing in digital innovation, sustainable offerings, and differentiation—while governments need to ease tax burdens and simplify entry rules to stay globally competitive.





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