

The UK travel market and opportunities for the Moroccan tourism sector

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ABTA's purpose



Holidays to Morocco

- Around 650,000 visitors from the UK to Morocco each year
- Approximately half of these will be travelling with ABTA Members (leisure and business)
- North African and Turkey markets impacted by a fall in visits from UK tourists since 2015
- Latest feedback is that operators are growing their programmes
- Tunisia Foreign & Commonwealth Office advice has been lifted and 2018 programmes resuming

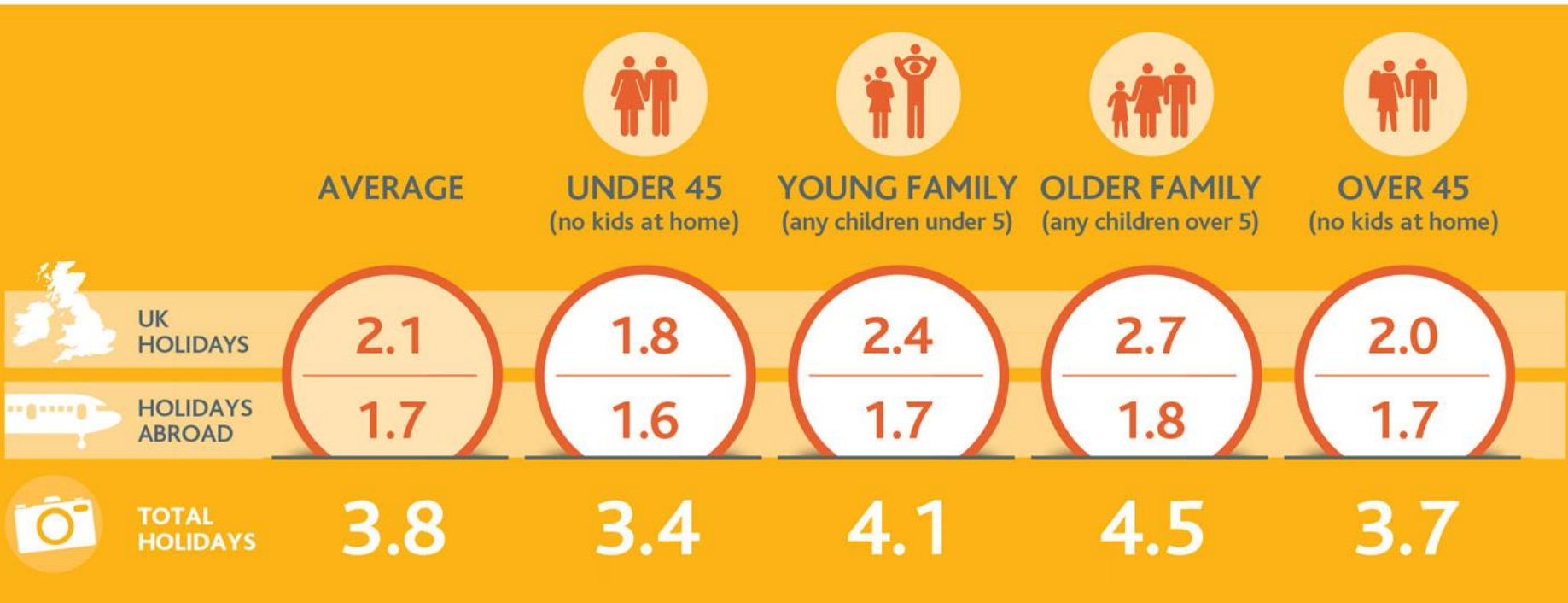
The British love to take holidays

AVERAGE NUMBER OF HOLIDAYS



Families and over-65s taking the most holidays

AVERAGE NUMBER OF HOLIDAYS PER PERSON IN 2017 BY LIFE STAGE



The re-emergence of the package holiday

- Packages are the most popular type of holiday for UK holidaymakers
- 52% of people booked an overseas package holiday in 2017, the highest figure since 2011
- The main reasons people book a package holiday are:
 - “to have everything taken care of”
 - “best value option for the price”
 - “saves time”
 - “I wanted an all-inclusive holiday”
 - “reputation of the company”
 - “financial protection”
- And . . .City breaks are now more popular than beach breaks

What's important to holidaymakers?



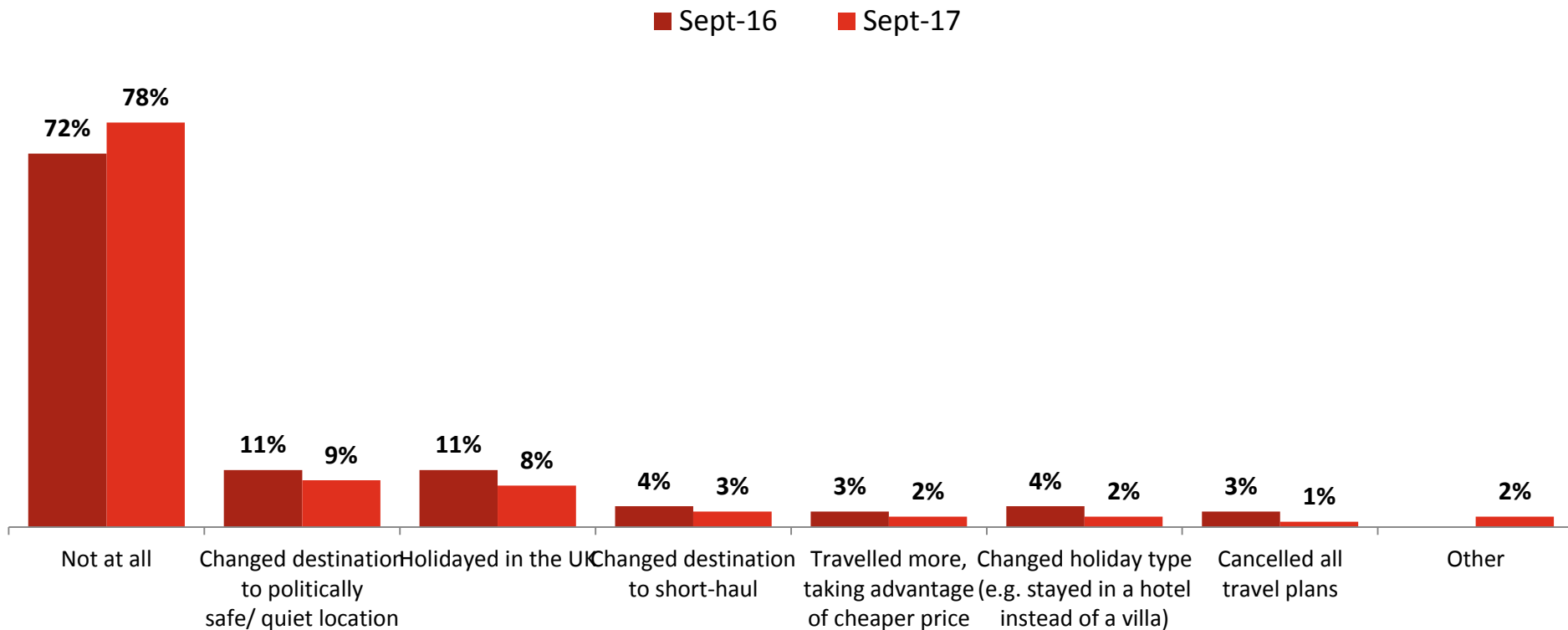
How important are these considerations when you book?

Reason	Ranking (Important or essential)
Safe and secure accommodation standards	90%
Financial protection	86%
Knowledgeable staff	76%
Member of ABTA	72%
Lowest prices	65%
Quality of the airport experience	65%
Sustainability credentials of the holiday provider	38%*

*NB/ only 14% think this is "Not important"

What's important to holidaymakers?

How has terrorist activity over the last 12 months impacted your travel plans?



Note: n=2,050 Sep 2016, n=2,008 Sep 2017

Source: PwC consumer survey

Travel trends 2018

- Responsible tourism takes centre stage
- A taste for alternative destinations
- Packages provide certainty
- Low-cost long-haul opens up
- Luxury meets escapism

“70% of people now believe that their holiday should help the local people and community”

