
UK
NORDIC TOURISM COLLECTIVE


It's big
€60bn
94.6 m trips
€70.5bn
by 2023

it likes the sun

TOP COUNTRIES VISITED IN THE PAST 12 MONTHS
(DIFFERENCE IN RANKING COMPARED TO 2024)

32% (=)
1. Spain

24% (=)
2. France

18% (=)
3. Italy

14% (=)
4. USA

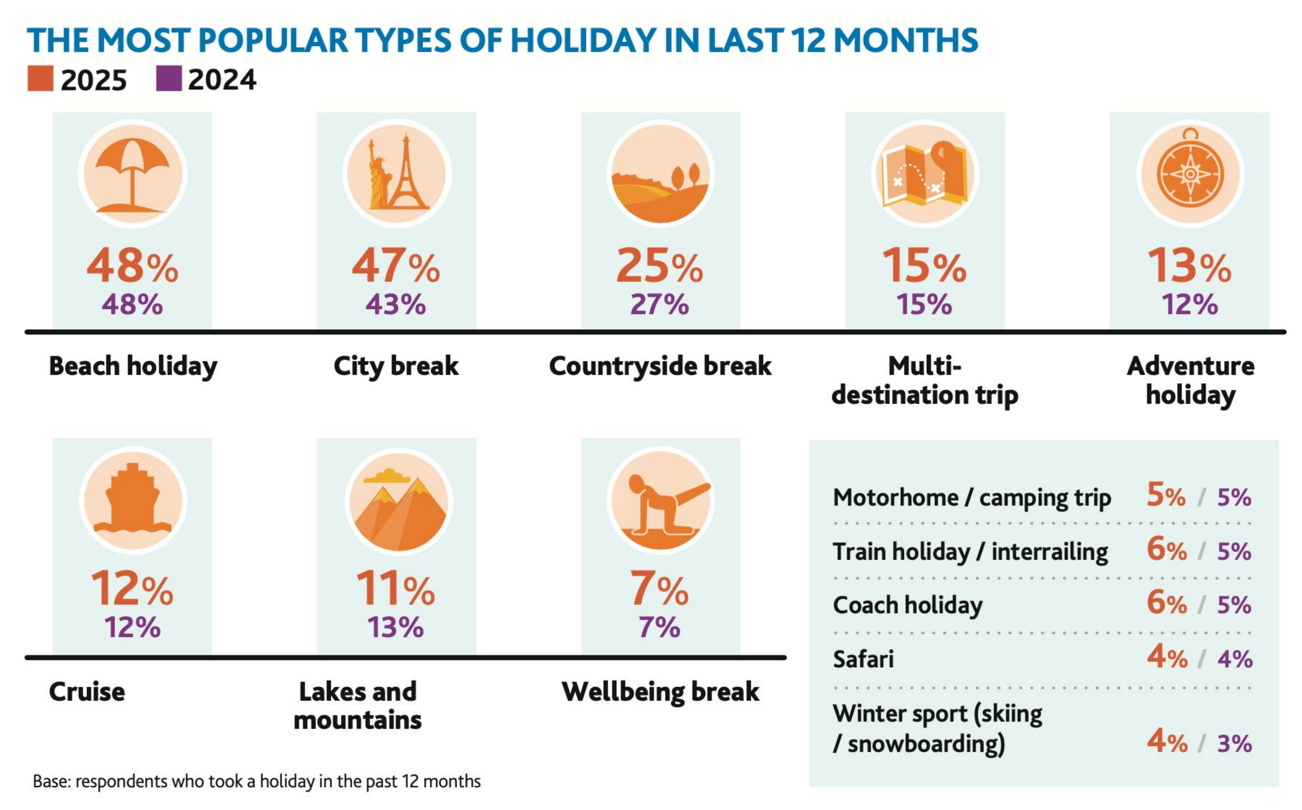
12% (=)
5. Greece

6. Germany 12% (+1)
7. Portugal 11% (-1)
8. Turkey 8% (=)
9. Australia 7% (+3)

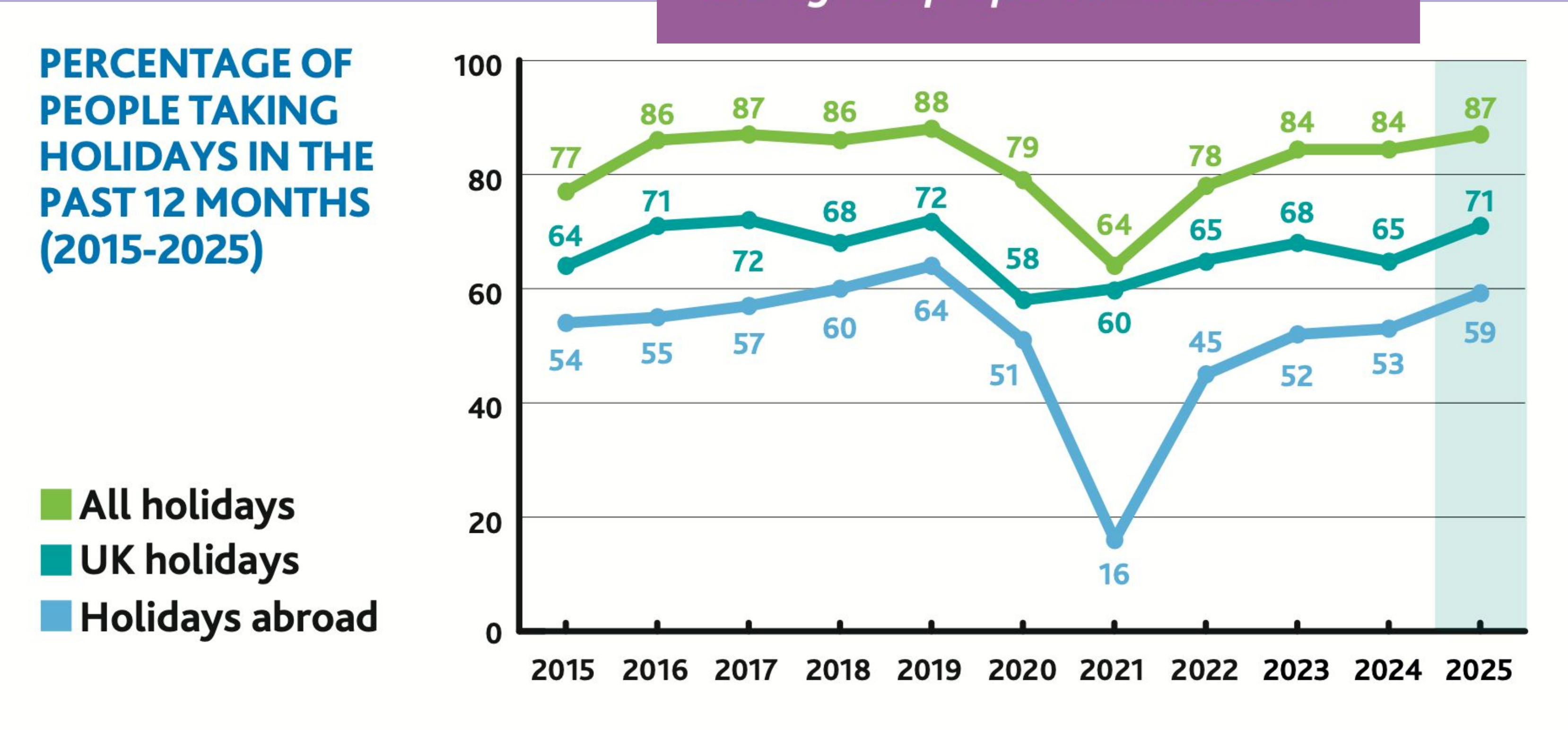
10. Austria 7% (+1)
11. Cyprus 6% (+6)
12. Ireland 6% (+1)
13. United Arab Emirates 6% (-2)

14. Croatia 6% (+1)
15. Netherlands 5% (=)

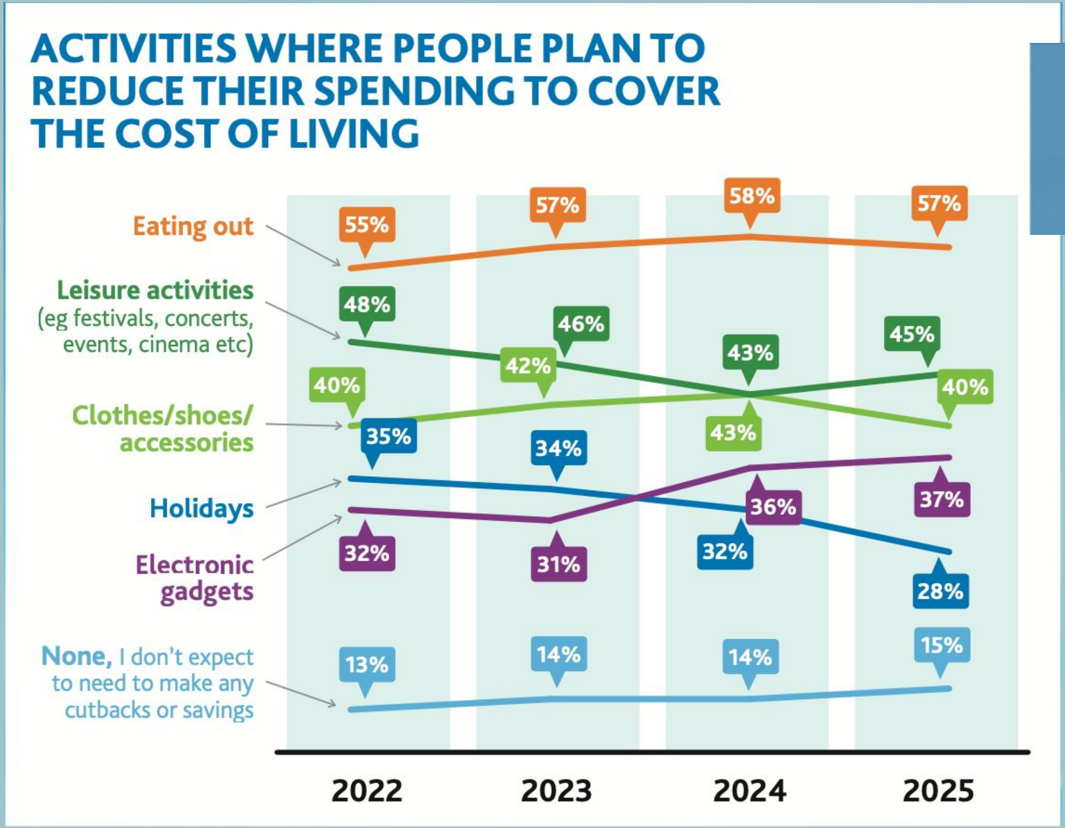
but other stuff too



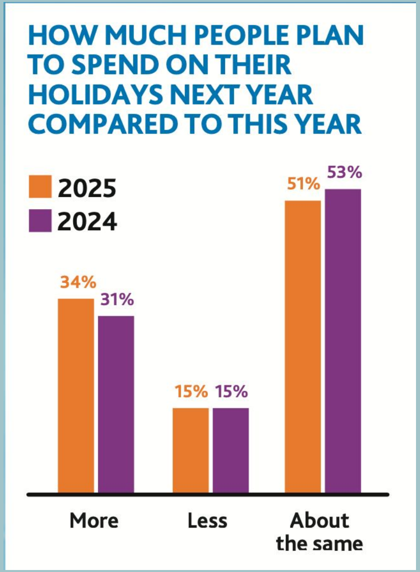
Nearly nine out of 10 people took a holiday in 2025, the highest proportion since 2019



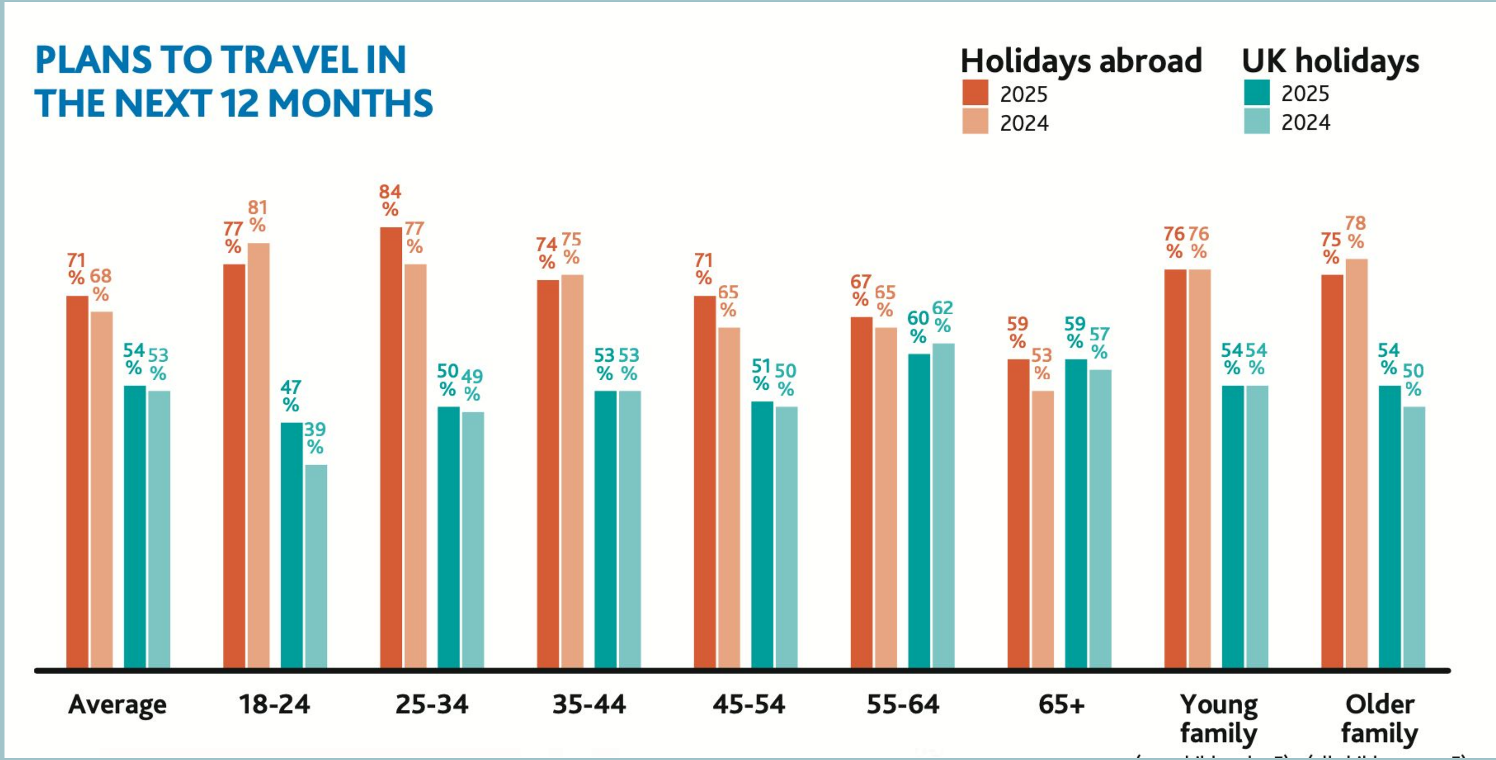
Holidays remain a priority



People are nearly twice as likely to cut back spending on eating out than their holidays to cover the cost of living



Looking ahead



and when

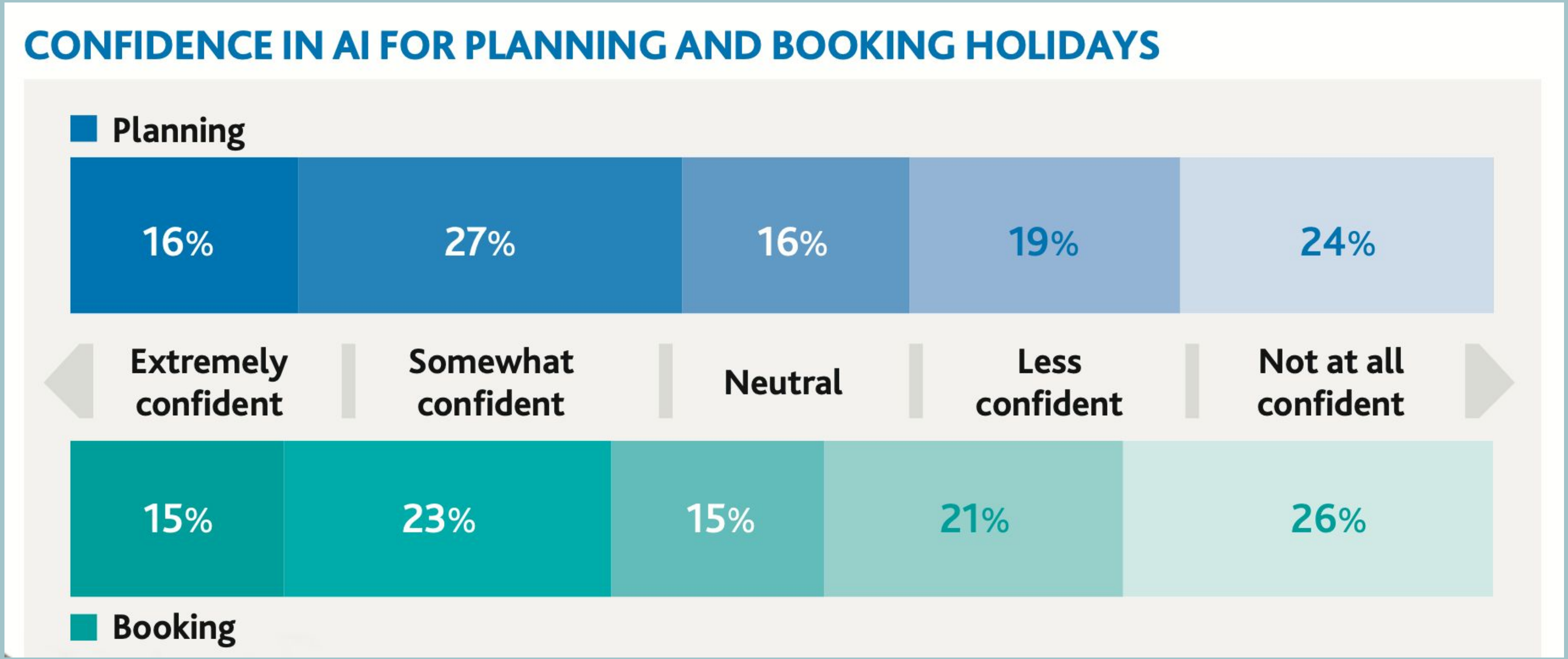
	2026											
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Average*	**10%**	**12%**	**13%**	**15%**	**17%**	**18%**	**14%**	**16%**	**17%**	**9%**	**5%**	**6%**
Under 45 (no kids at home)	14%	11%	11%	12%	17%	21%	21%	15%	14%	8%	2%	4%
Young family (any child under 5)	12%	10%	12%	16%	9%	15%	14%	19%	12%	7%	9%	15%
Older family (all children over 5)	5%	13%	12%	18%	15%	17%	19%	25%	12%	5%	2%	5%
Over 45 (no kids at home)	10%	13%	15%	15%	21%	19%	9%	11%	22%	11%	6%	4%

researching

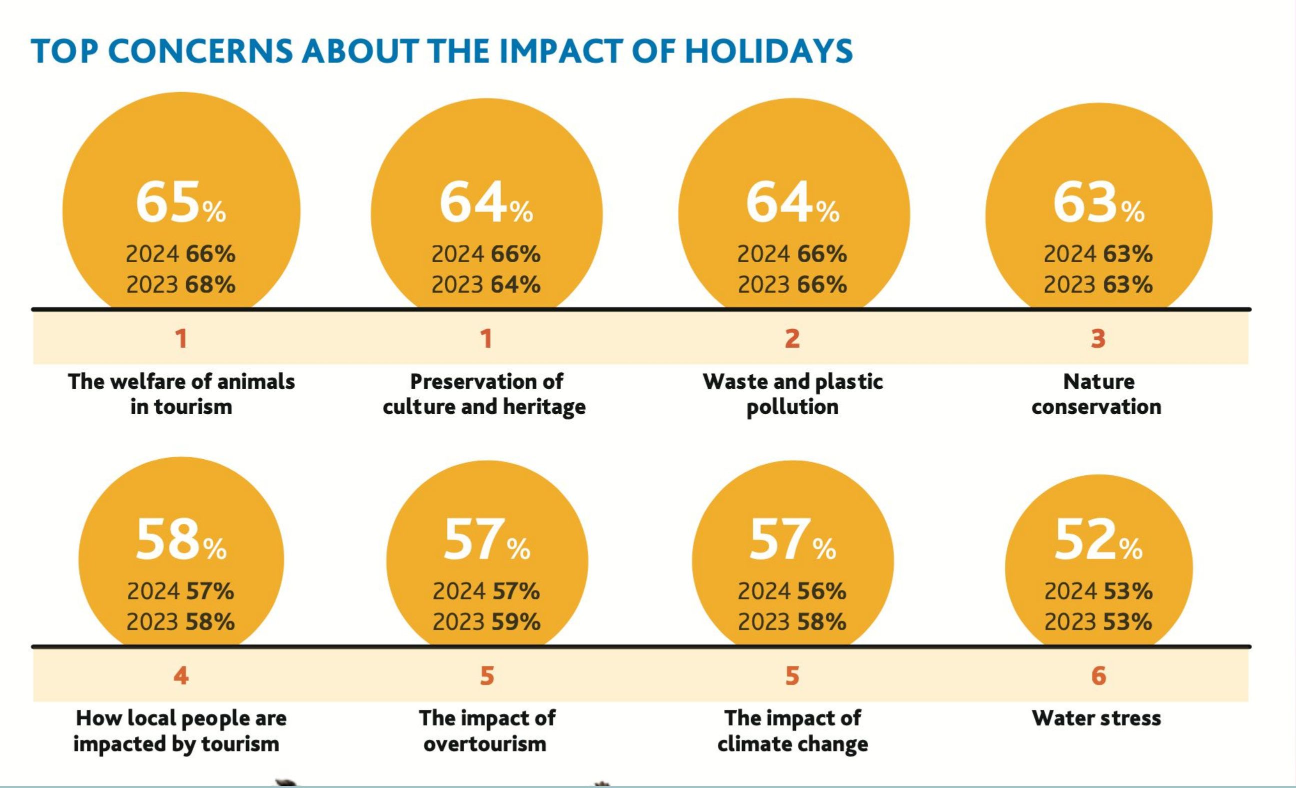
	AVERAGE	18-24	25-34	35-44	45-54	55-64	65+
General internet searching	48%	36%	37%	46%	55%	59%	48%
Recommendations from family and friends	41%	39%	41%	41%	43%	44%	37%
Travel websites and guidebooks	36%	25%	36%	36%	37%	45%	32%
Online forums	26%	22%	32%	29%	30%	29%	17%
Holiday/destination brochures	25%	20%	28%	22%	21%	25%	30%
Social media platforms	22%	42%	41%	32%	17%	9%	4%
Travel agents and tour operators	21%	15%	23%	22%	19%	21%	22%
Online video sites	20%	31%	27%	31%	20%	15%	7%
Films or TV shows	12%	16%	11%	17%	13%	13%	7%
Newspapers, magazines or blogs	11%	8%	11%	10%	9%	11%	13%
Podcasts/travel-related audio	6%	7%	11%	11%	4%	3%	1%
AI	8%	13%	18%	14%	5%	3%	1%

The number of people using AI for holiday inspiration has doubled year-on-year

AI planning vs booking



Responsible travel

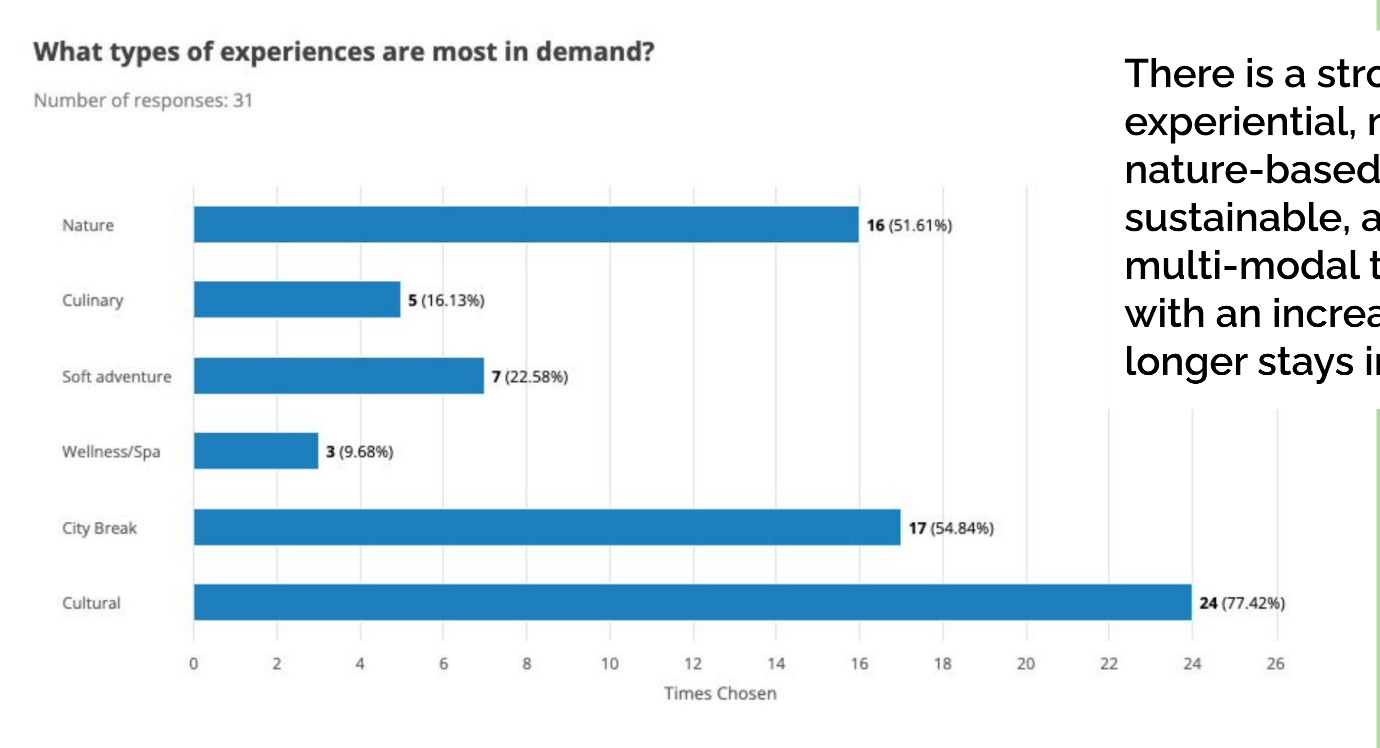


trends

NORDIC
TRAVEL
SOLUTIONS

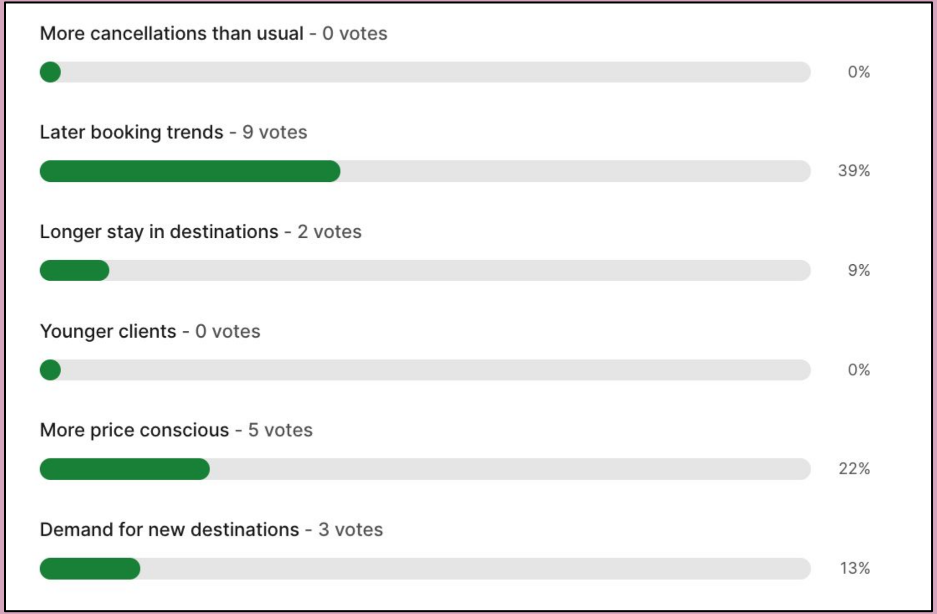
interest in new destinations

holiday interest



There is a stronger focus on experiential, niche and nature-based travel (e.g., sustainable, adventure, or multi-modal transport) along with an increased demand for longer stays in the region.

the trade view



Challenges

Other potential factors which could still affect the numbers:

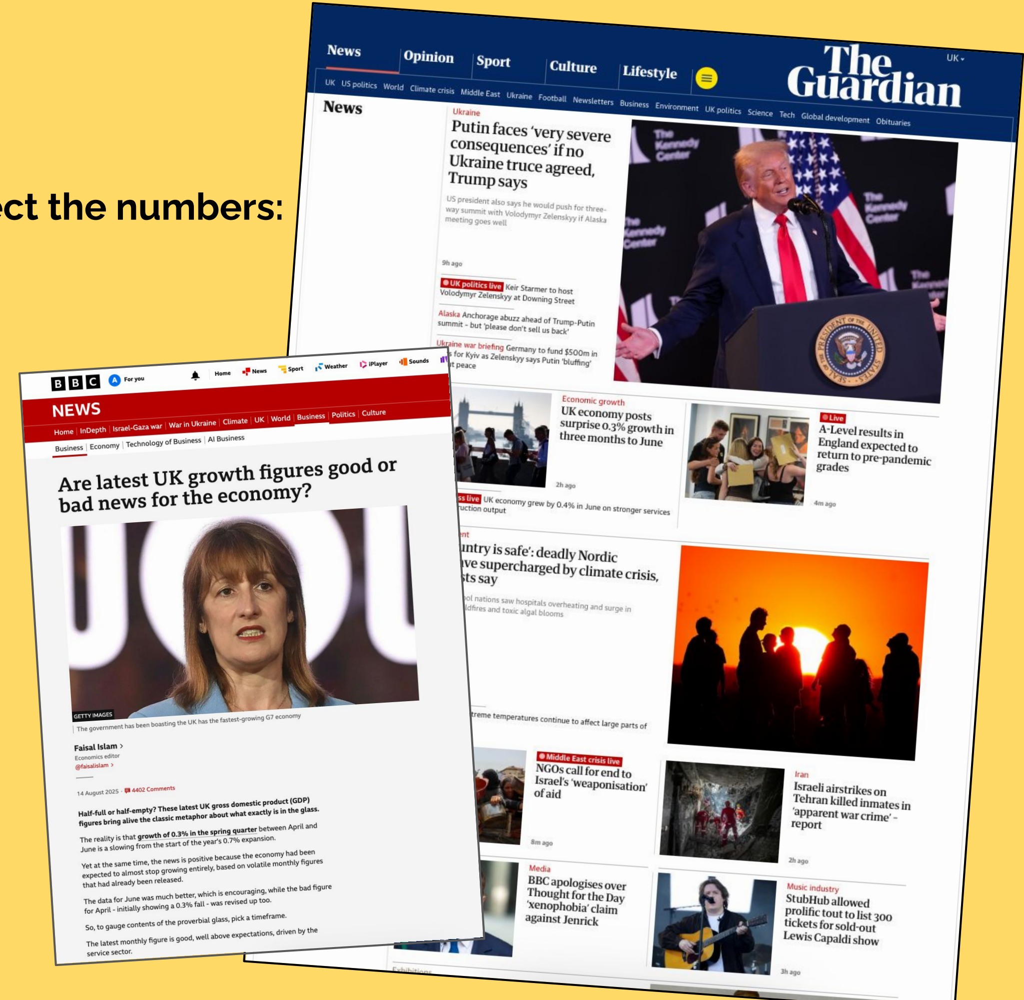
Deeper economic challenges

Inflation in UK and rising costs in destinations

Additional and prolonged airline strikes

Severe weather related incidents

Other geopolitical factors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The Guardian

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News

Ukraine
Putin faces 'very severe consequences' if no Ukraine truce agreed, Trump says

US president also says he would push for three-way summit with Volodymyr Zelenskyy if Alaska meeting goes well

9h ago

UK politics live Keir Starmer to host Volodymyr Zelenskyy at Downing Street

Alaska Anchorage abuzz ahead of Trump-Putin summit – but 'please don't sell us back'

Ukraine war briefing Germany to fund $500m in … for Kyiv as Zelenskyy says Putin 'bluffing' … peace

Economic growth
UK economy posts surprise 0.3% growth in three months to June

2h ago

…ss live UK economy grew by 0.4% in June on stronger services …ruction output

Live
A-Level results in England expected to return to pre-pandemic grades

4m ago

…untry is safe': deadly Nordic …ve supercharged by climate crisis, …sts say

…ol nations saw hospitals overheating and surge in …ldfires and toxic algal blooms

…treme temperatures continue to affect large parts of

Middle East crisis live
NGOs call for end to Israel's 'weaponisation' of aid

8m ago

Iran
Israeli airstrikes on Tehran killed inmates in 'apparent war crime' – report

2h ago

Media
BBC apologises over Thought for the Day 'xenophobia' claim against Jenrick

Music industry
StubHub allowed prolific tout to list 300 tickets for sold-out Lewis Capaldi show

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Are latest UK growth figures good or bad news for the economy?

GETTY IMAGES

The government has been boasting the UK has the fastest-growing G7 economy

Faisal Islam
Economics editor
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14 August 2025 · 4402 Comments

Half-full or half-empty? These latest UK gross domestic product (GDP) figures bring alive the classic metaphor about what exactly is in the glass.

The reality is that **growth of 0.3% in the spring quarter** between April and June is a slowing from the start of the year's 0.7% expansion.

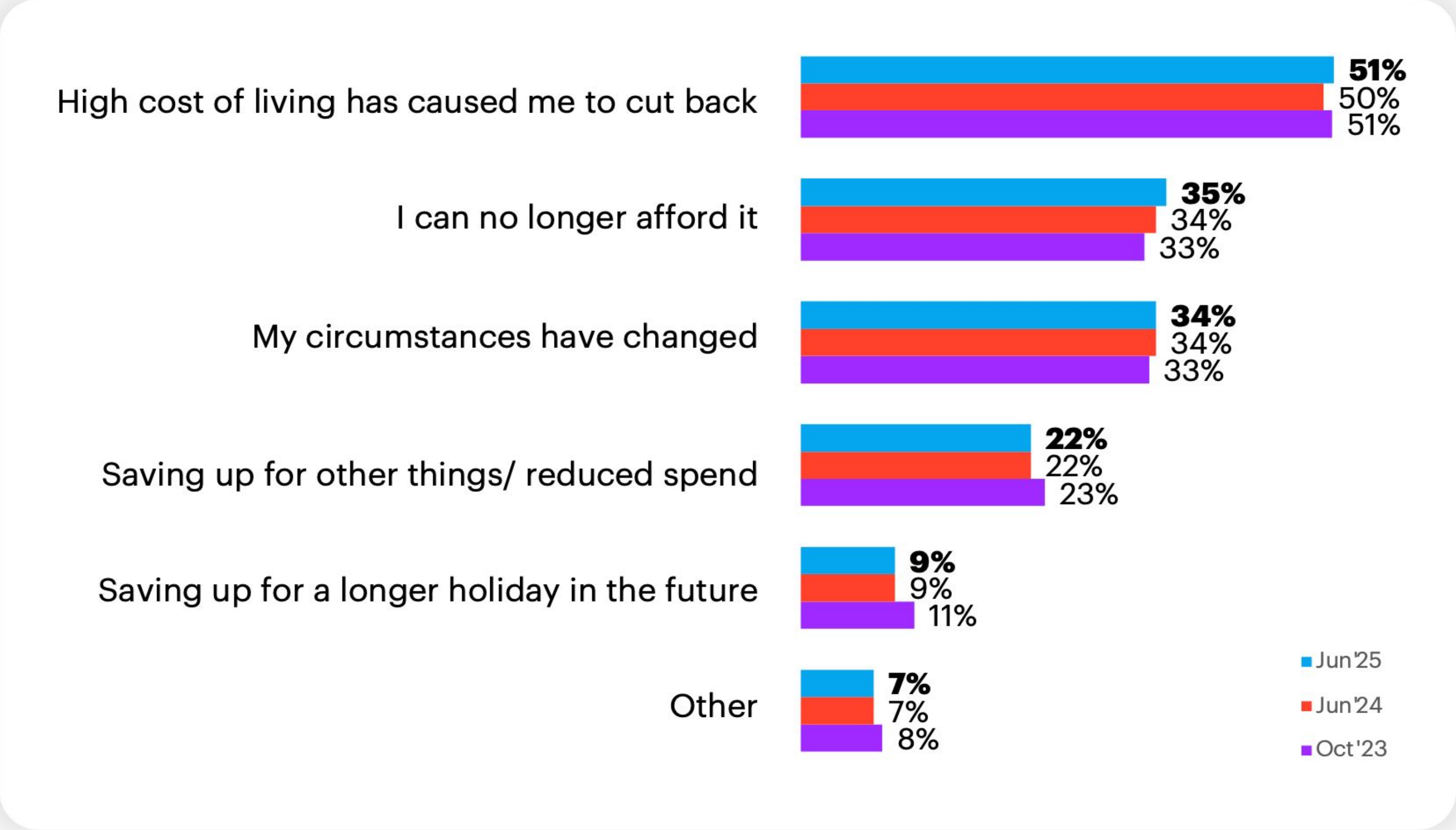
Yet at the same time, the news is positive because the economy had been expected to almost stop growing entirely, based on volatile monthly figures that had already been released.

The data for June was much better, which is encouraging, while the bad figure for April - initially showing a 0.3% fall - was revised up too.

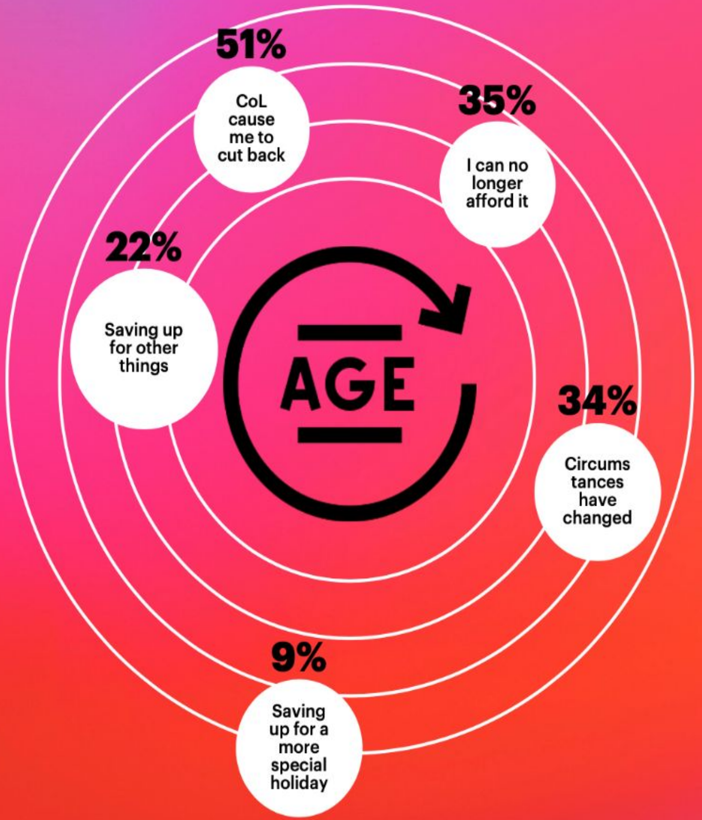
So, to gauge contents of the proverbial glass, pick a timeframe.

The latest monthly figure is good, well above expectations, driven by the service sector.

High cost of living remains the main reason for fewer holidays being taken



Reasons for reducing holiday spend



Diff in score by age – Wave on Wave

	<34s			>35s		
	Oct'23	Jun'24	Jun'25	Oct'23	Jun'24	Jun'25
CoL caused me to cut back	38%	49%	50%	55%	50%	52%
I can no longer afford it	24%	35%	34%	36%	33%	35%
Circumstances have changed	35%	42%	44%	33%	31%	30%
Saving up for other things	39%	32%	30%	18%	18%	19%
Saving up for a longer holiday	17%	18%	15%	9%	6%	7%

Base: All nationally representative sample that have been on holiday in the last 12 months that said that they went on fewer holidays compared to an average year (934)
Q5a You said that you have had fewer holidays in the last 12 months than you did previously...Which, if any, of the following are reasons for this?

Buying components separately provides the ability to create a holiday that aligns with personal desires and travel goals

AUTONOMY

Personalization:
Travelers can customise their itineraries to match their interests, ensuring a unique and personalised experience.

Avoidance of Unwanted Components:
Travelers avoid paying for or dealing with unnecessary features included in some package deals, such as meals or activities that do not interest them.

Flexibility:
Allows travelers to tailor every aspect of their holiday, including flights, accommodations, and activities, to fit personal schedules and preferences.

AUTHENTICITY

Avoidance of crowds
Travelers feel booking separately enables them to avoid areas of mass tourism to enjoy a more local experience.

Quality Control:
Travelers have the opportunity to select each component based on reviews and personal standards, ensuring a holiday experience that meets specific expectations.

Cultural Immersion:
Travelers booking independently feel they engage more deeply with local cultures and explore destinations beyond the typical tourist routes.

"I always feel like they [package holidays] would be constraining and that I wouldn't actually see an authentic side of the country I'd travelled to if committed to a resort. I can understand a package being less stressful for convenience but personally, I would find it a bit soul-destroying."

"I never book package holidays. Better value and more choice if you book separately. You get something much more individual and that fits around your own tastes and needs,and get to go to less touristy places."

The very young are driving holiday involvement, with few saying they won't have any holidays in the next 12 months

The number of holidays differs significantly by age

<34s

10% ↓

expect to go on 0 holidays

<34s

51% ↑

expect to go on 2+ holidays

>35s

18%

expect to go on 0 holidays

>35s

46%

expect to go on 2+ holidays

↑ Sig increase ↓ Sig decrease Arrows denote a statistically significant difference vs >35s at the 95% confidence interval

The traveler needs to balance personal preference with practical considerations

Personal preferences

- Many choose destinations based on what excites them (e.g. history, culture, etc.).
- Type of holiday (e.g. relaxation vs. exploration).
- Some avoid commercialised or crowded destinations.

"I consider my interests (beach, city, adventure, culture, food, or nature), time of year, and travel style. I research through travel blogs, social media, guidebooks, and reviews. I prioritise must-see attractions, local experiences, and off-the-beaten-path activities to create an authentic itinerary."

Travel inspirations

- Recommendations from friends and family are highly valued.
- Discovery of new destinations and travel inspiration through various social media platforms.
- Travel inspirations through magazines, TV, YouTube or blogs.

"I get inspired by friends/family/social media, e.g Instagram around a destination."

Destination attributes

- Weather and seasonal climate suitability are considered in travel decisions.
- Consideration of safety, accessibility and proximity to beach, town, or attractions.
- Consideration of language barriers and ease of navigation.

"Destinations are decided by just thinking about where we haven't been before or, in the case of winter trips, where to get warm weather. I'd use weather apps to determine where to go for winter sun."

Practical considerations

- Consideration of travel distance, flight times, and location convenience (e.g. proximity to airports or public transport).
- Availability during preferred travel dates.

"I choose the destination based on what I'm looking for (relaxation or sightseeing, for example) and also what flights are available from the airports within close distance of me. The latter has a very big influence on where I go."

Many seek relaxation in their holiday but also pair it with cultural or adventurous activities.

Recreation

Relaxation is key: Many seek quiet, uncrowded destinations featuring beaches or pools for sunbathing, lounging, or being pampered.

Balance matters: People often prefer a mix of restful days and light activities, like sightseeing, local dining, or natural walks.

Flexibility and calm environments are valued: They choose places where they can unwind at their own pace, with some relaxing in the afternoons after morning excursions.

"I look for beach holidays somewhere hot and somewhere that has a lot of restaurants and bars, but also somewhere with plenty of scenery."

Culture & Entertainment

Cultural experiences: People seek historical sites, museums, local traditions and cuisine, and opportunities to immerse themselves in the culture of the destination.

Entertainment and nightlife: People look for live music, festivals, performances and vibrant local scenes like bars, cafes and social spaces.

Social connection matters: People plan around meeting people, attending group activities, or spending time with friends and family.

"We choose a destination where there are opportunities to see the country/area and experience local culture. We research opportunities for walking, photography, restaurants, nice accommodation, and views by visiting various tourism websites."

Adventure

Nature-based exploration: Others enjoy nature-based activities including hiking, walking, wildlife watching or visiting landscapes.

Outdoor adventure activities: They seek outdoor activities ranging from camping and geocaching to scenic drives and sport activities, getting a sense of discovery and connection with natural surroundings.

"I would like to experience different environments and climates and see views and plants and animals. I may also be interested in specific cultures or landmarks."

YouGov AI Qual Explorer Data - n=1700 open-ended responses thematically analysed by YouGov Qualitative

10 mega-trends

Trend 1

Untrending is the New Trendy

Well-known destinations no longer dominate travellers’ to-visit lists.

Operators specialising in outbound travel have reported that off-peak travel is also proving more popular, with travellers increasingly keen to travel without the crowds even if that means travelling during the wet season or when the weather is colder or hotter.

The appetite for ‘adventure with purpose’ has never been stronger, with a rise in self-guided travel reported as a significant growing trend. Travellers are looking for flexibility, authenticity and the desire to immerse themselves in a destination, all of which plays to the strengths of self-guided travel.”

Trend 2

Regenerative Travel Grows Up

From supporting rewilding projects to tracking soil health on property grounds, destinations and travel brands are integrating regenerative practices into their operations at a growing rate

Travellers are also beginning to understand their role in contributing to a regenerative model of tourism by seeking impact- oriented activities

Trend 3

Travel for Every Stage of Life

Travel is becoming more attuned to who we are and the life stages we’re in, not just where we’re going.

Demand for holidays that meet people’s physical, emotional, and relational needs while offering something meaningful to learn or do

Trend 4

Sweat It Out on a Sauna-vation

Searches for properties with saunas are up 30% year-on-year, wellness has become a cornerstone of luxury travel.

Today's guests seek more than relaxation, and nature-aligned healing rituals such as saunas, with benefits ranging from improved sleep to stress relief, are increasingly essential

Trend 5

Ready, Set, Roam: Midlife Women Redefine Travel

Women aged 50 and older are the travel industry's quiet powerhouse with significant spending power, ample time to spare. Many 50+ women travel solo or with friends, not content to let life passively go by but rather taking full advantage of this prime time in their lives to explore the world.

In North America alone this represents a US$245 billion travel market. And that number is expected to grow - travel spending by women aged 50 and older is set to more than double to US$519 billion by 2035

Trend 6

The Travel Rebellion Starts on Rails

Where once trains were the transport of the commuter, they’re now embraced as part of the adventure, a chance to journey through instead of flying over, connecting with places along the way

Trend 7

The Billionaire Backlash and Reframing Luxury Travel

Luxury travellers increasingly seek authenticity over excessive extravagance.

Trend 8

A New Set of Metrics: Destinations That Measure What Matters

Today, an increasing number of destinations are tracking a wide range of metrics historically unaffiliated with traditional measures of tourism success.

Focusing on supporting sustainable development and improving accessibility, among other community-centric priorities.

Trend 9

Green Eating, Elevated: Vegan Goes High-End

Over the past couple of years, there’s been a growing interest in plant- based travel with more vegan meal options, vegan-based tours, and even all-vegan cruises.

Once again, vegan travel is getting another glow up and reaching new gastronomic heights

Trend 10

Nature: The Luxed-Up Look

Whilst there will always be an opportunity to rough it, a new era of luxury outdoor hospitality has emerged on the scene and is growing in demand

What this means for Nature tourism and the Baltics

The signs are good

Interest in **new destinations and lesser known destinations**

Slow tourism and off-peak travel

Wildlife Watching/**nature-based** activities

Authenticity

Sauna

Wellness

Purposeful and **regenerative** travel

Value for money

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