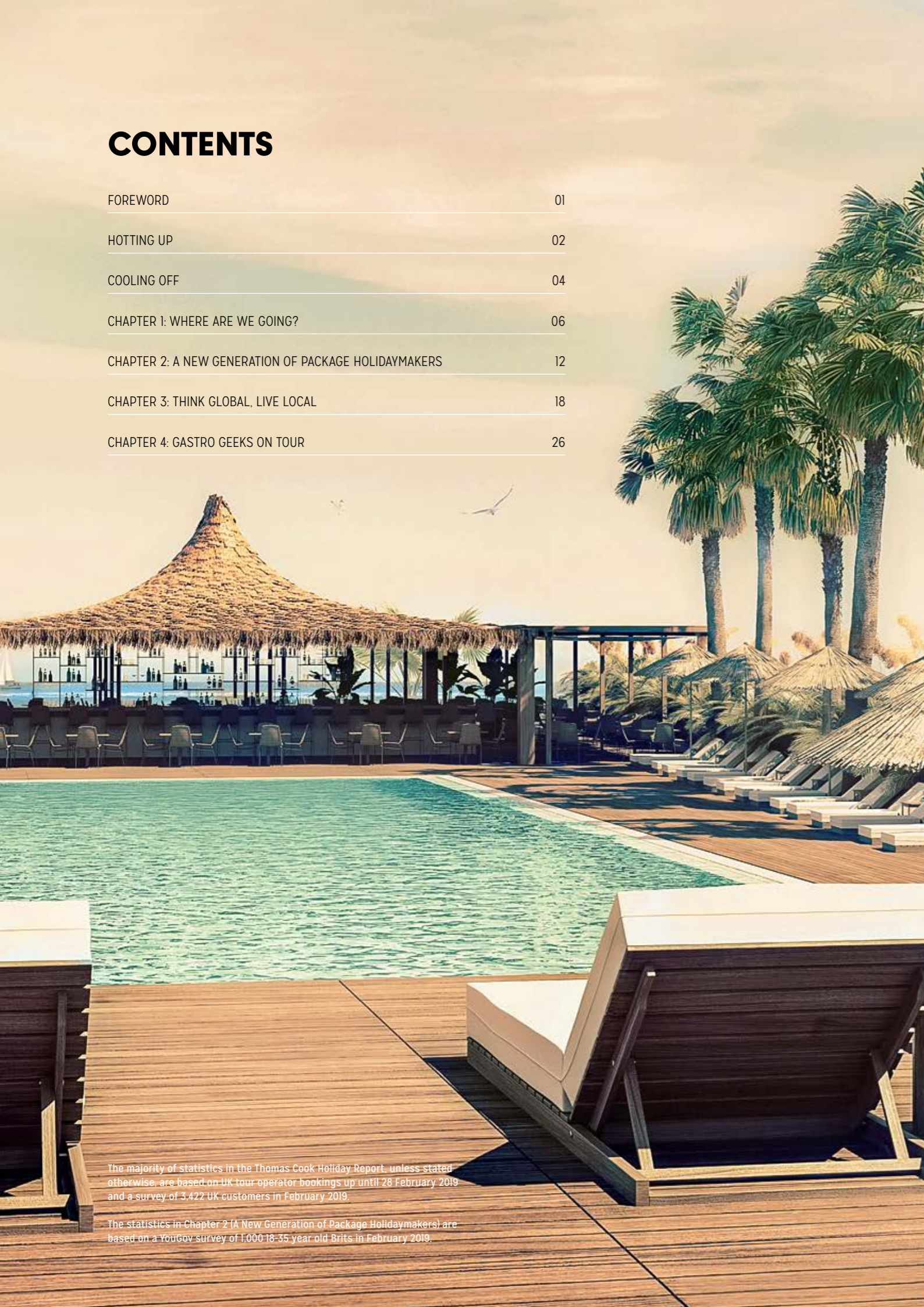




CONTENTS

FOREWORD	01
HOTTING UP	02
COOLING OFF	04
CHAPTER 1: WHERE ARE WE GOING?	06
CHAPTER 2: A NEW GENERATION OF PACKAGE HOLIDAYMAKERS	12
CHAPTER 3: THINK GLOBAL, LIVE LOCAL	18
CHAPTER 4: GASTRO GEEKS ON TOUR	26



The majority of statistics in the Thomas Cook Holiday Report, unless stated otherwise, are based on UK tour operator bookings up until 28 February 2019 and a survey of 3,422 UK customers in February 2019.

The statistics in Chapter 2 (A New Generation of Package Holidaymakers) are based on a YouGov survey of 1,000 18-35 year old Brits in February 2019.

FOREWORD



Welcome to the Thomas Cook Holiday Report for 2019. Now in its third year, it is bigger than ever. We have spoken to more than 28,500 customers across nine of our markets and, for the first time, we have also commissioned research among 4,000 18-35 year olds as we take a closer look at the priorities for this new generation of package holidaymakers.

In the UK, we are living in a time of unprecedented political upheaval and there is little doubt that the prolonged uncertainty around the manner and timing of Britain's exit from the European Union has led many customers to press pause on their holiday plans for this summer. At the time of writing, the Brexit deadline has been extended until the end of October but it is too early to say what impact this will now have on consumer confidence.

However our own insight - and industry data - tells us that customers do still plan to holiday abroad this year. More than half say that they are more likely to travel outside the UK compared to the last couple of years.

For those who have booked, it's non-EU countries such as Turkey and Tunisia which are proving popular, along with all-inclusive deals as customers "lock in" costs for food and drink for peace of mind.

A year on from the last Club 18-30 holiday, we take a look at how the package holiday is moving with the times for a generation who have quite different priorities for their hard-earned week in the sun versus their parents at the same age.

Meanwhile, it's increasingly clear that there will be no package holiday for future generations if we don't change our behaviour to protect some of the world's more fragile environments. Our research shows that customers act less sustainably on holiday than at home - despite their best intentions. For example, 42% say they recycle on holiday, compared to 77% at home. We know that more and more holidaymakers want to make a positive difference to the destinations they are holidaying in and the people who live there but as an industry, we still have a big job to do to help them achieve this.

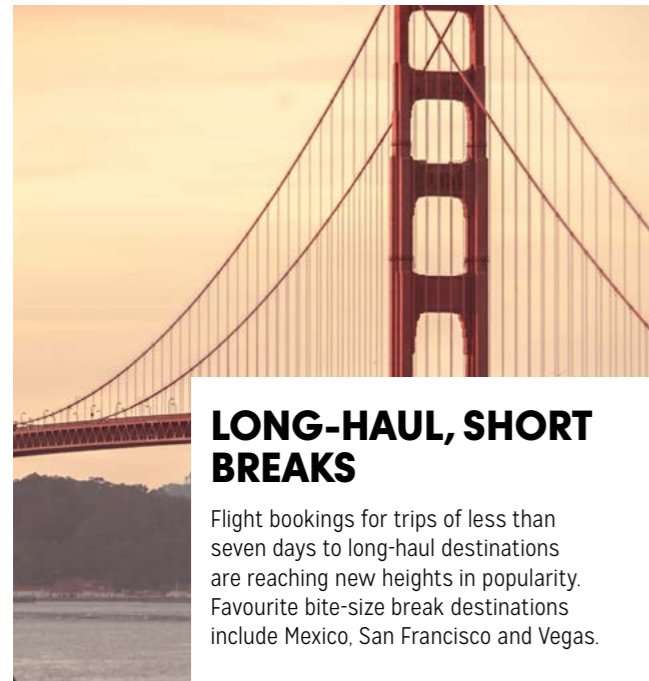
Finally, we look at how our growing passion for good food - and where it comes from - is spilling over into our holidays. With nine in ten Brits admitting that the hotel restaurant influences the hotel they choose, we're clearly becoming a nation of Gastro Geeks abroad.

We hope you enjoy reading the report. Thomas Cook may be the oldest brand in travel, but I'm confident that this shows we continue to have our fingers on the pulse when it comes to where we want to go and what we want to do on those all-important weeks in the sun.

Peter Fankhauser
CEO
Thomas Cook Group

Hotting up

Holidays are among the highlights of the year for most Brits. Carefully curated for maximum enjoyment, they say a lot about what we expect to see, eat and do when we're at our most relaxed. Here are the travel trends at the top of the "packing order" for summer 2019.



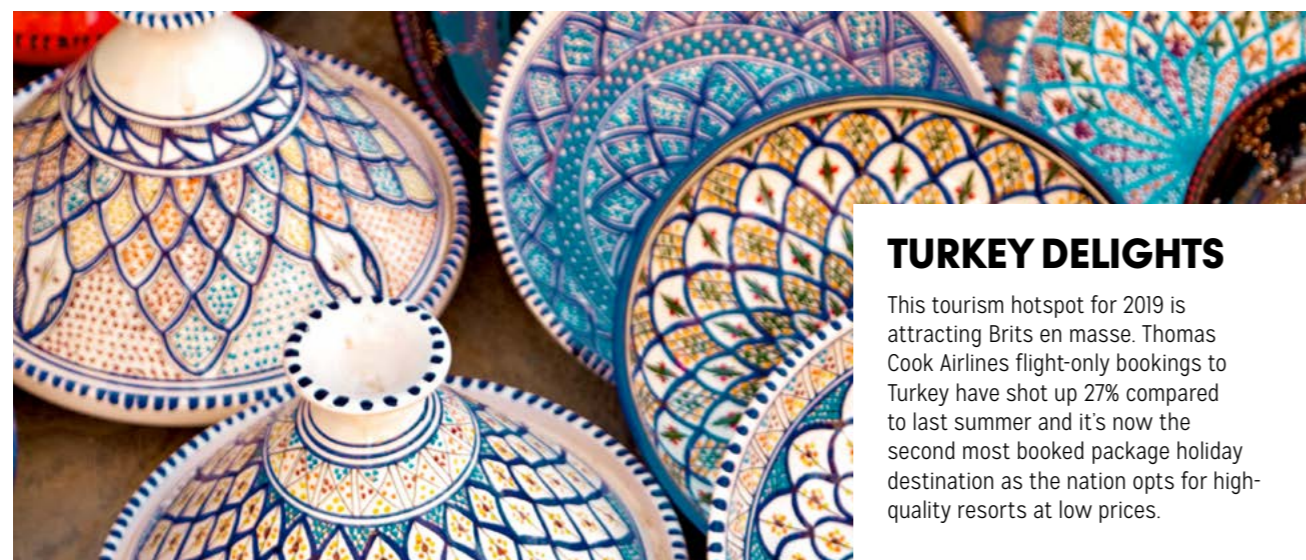
LONG-HAUL, SHORT BREAKS

Flight bookings for trips of less than seven days to long-haul destinations are reaching new heights in popularity. Favourite bite-size break destinations include Mexico, San Francisco and Vegas.



VENTURING BEYOND THE EURO ZONE

With the fluctuating value of the Pound against the Euro, nearly half of all Thomas Cook summer 2019 bookings are to destinations that don't have the Euro; an increase of 10% compared to last year.



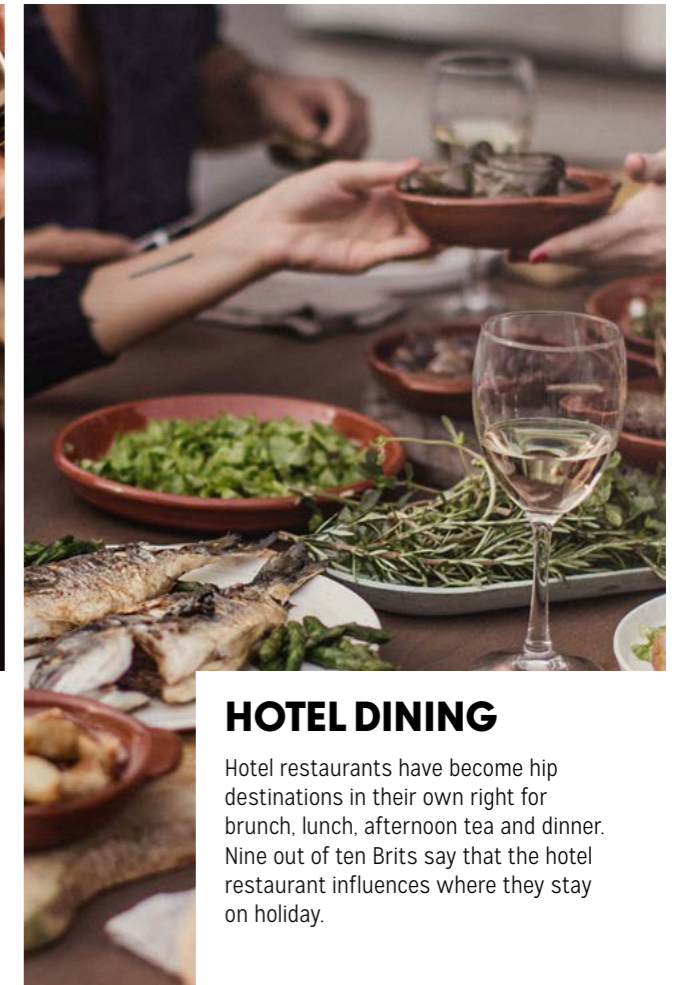
TURKEY DELIGHTS

This tourism hotspot for 2019 is attracting Brits en masse. Thomas Cook Airlines flight-only bookings to Turkey have shot up 27% compared to last summer and it's now the second most booked package holiday destination as the nation opts for high-quality resorts at low prices.



LOCAL ARTISAN SPIRITS

As a nation of cocktail connoisseurs, we expect the alcohol we consume on holiday to be locally produced and infused with sophisticated aromatic flavours.



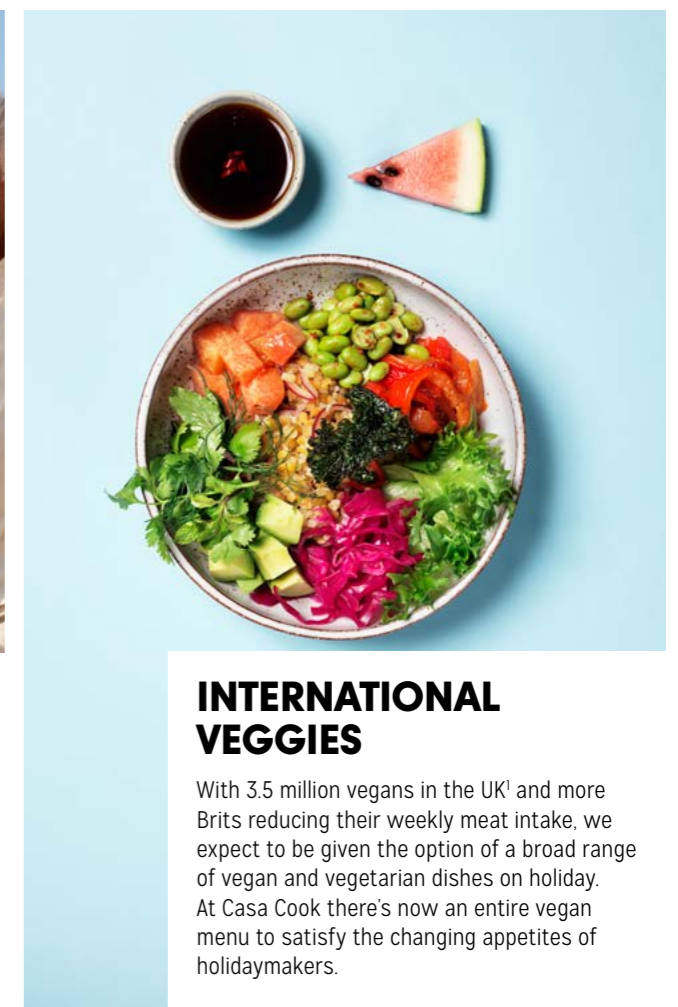
HOTEL DINING

Hotel restaurants have become hip destinations in their own right for brunch, lunch, afternoon tea and dinner. Nine out of ten Brits say that the hotel restaurant influences where they stay on holiday.



GRANDPARENTS TO THE RESCUE

Welcome to the split-gen holiday, where parents send their little ones away with grandparents while they enjoy some precious time at home without the kids. Over a third of Brits either do this already or are considering it as an option.

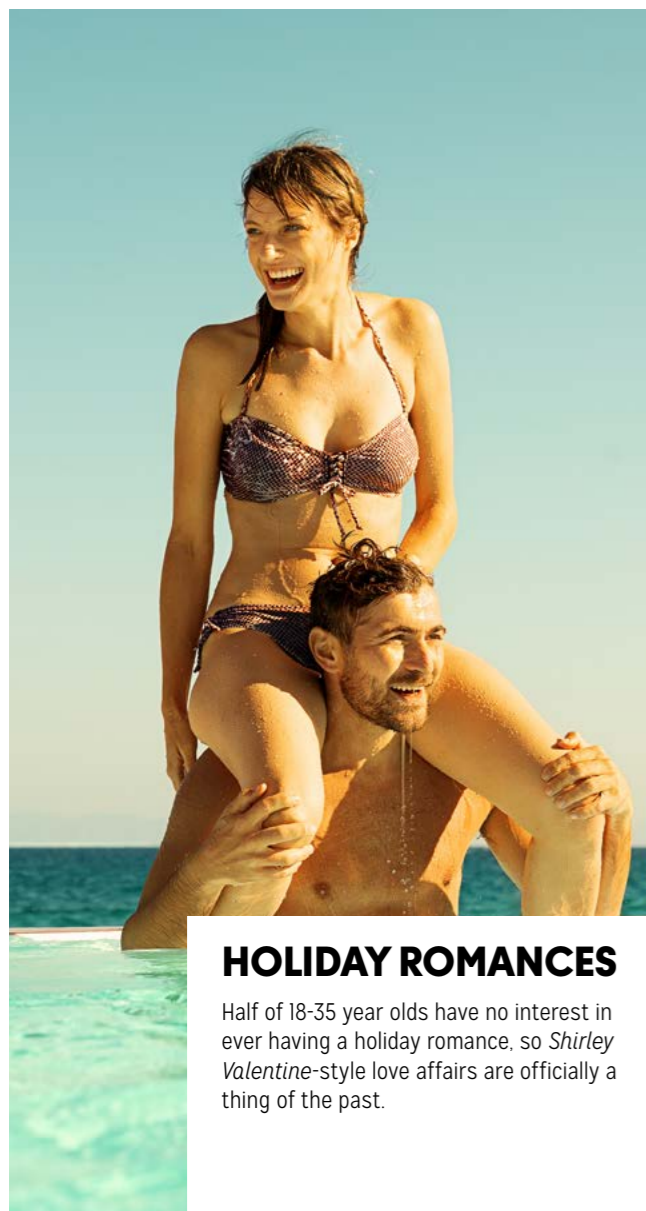


INTERNATIONAL VEGGIES

With 3.5 million vegans in the UK¹ and more Brits reducing their weekly meat intake, we expect to be given the option of a broad range of vegan and vegetarian dishes on holiday. At Casa Cook there's now an entire vegan menu to satisfy the changing appetites of holidaymakers.

Cooling off

As new travel trends come into land, others check out. Which former holiday highlights are cooling off this summer?



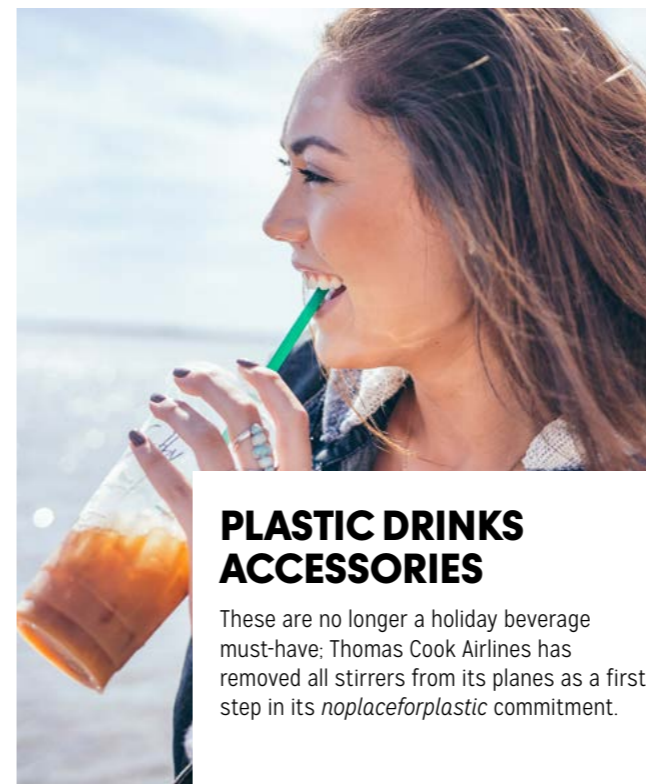
HOLIDAY ROMANCES

Half of 18-35 year olds have no interest in ever having a holiday romance, so *Shirley Valentine*-style love affairs are officially a thing of the past.



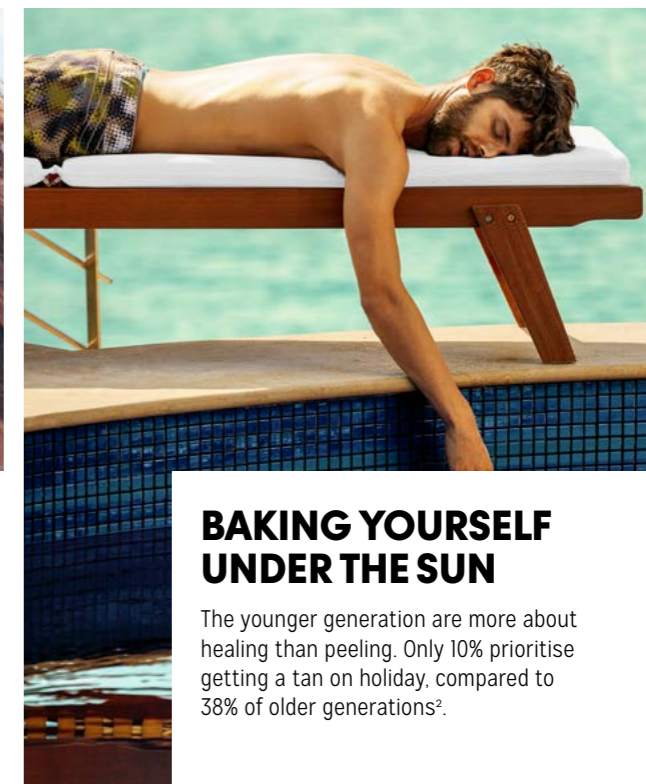
LARGING IT

Partying until the small hours is not where it's at for today's 18-25 year olds. A tiny minority of 10% see the local nightlife as an important part of their holiday.



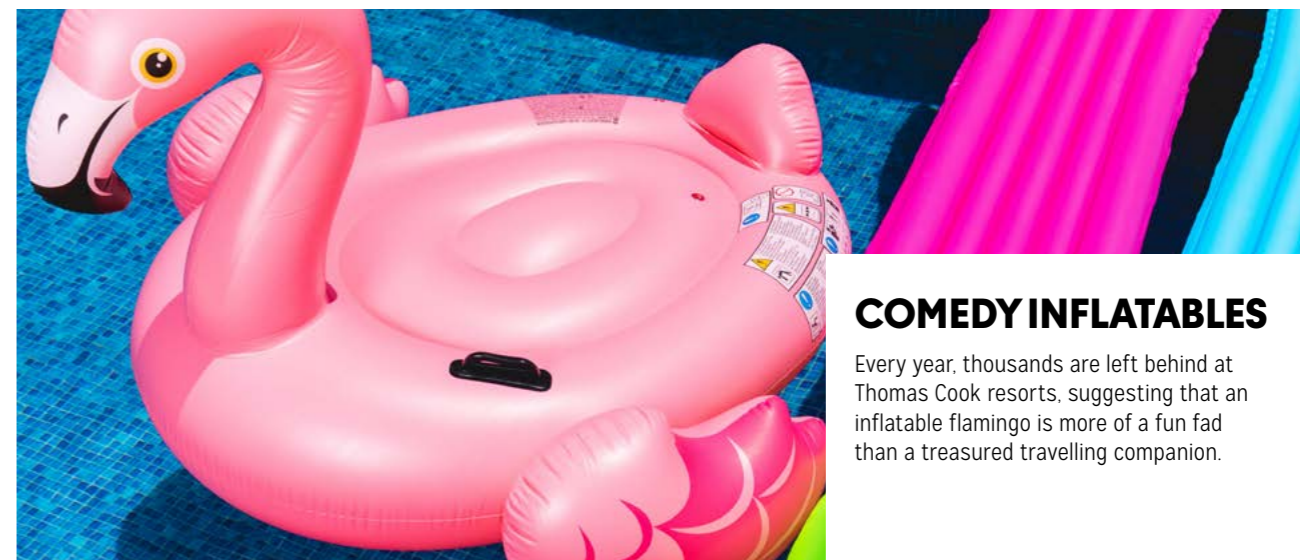
PLASTIC DRINKS ACCESSORIES

These are no longer a holiday beverage must-have; Thomas Cook Airlines has removed all stirrers from its planes as a first step in its *noplaceforplastic* commitment.



BAKING YOURSELF UNDER THE SUN

The younger generation are more about healing than peeling. Only 10% prioritise getting a tan on holiday, compared to 38% of older generations².



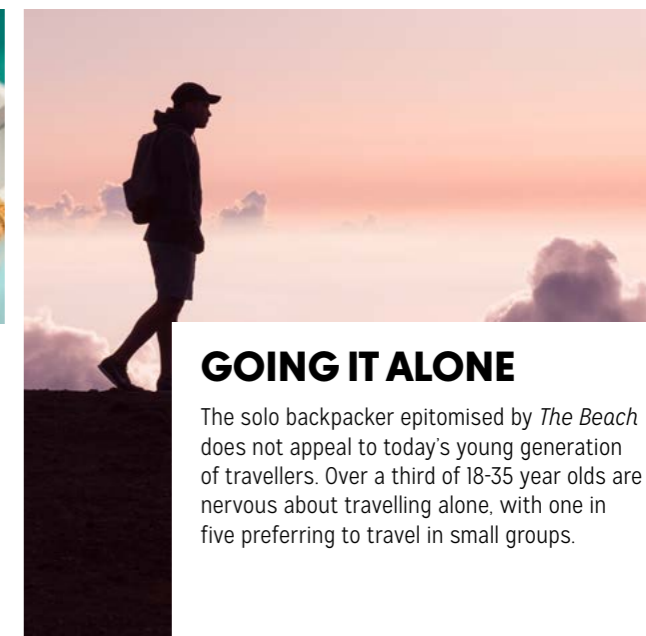
COMEDY INFLATABLES

Every year, thousands are left behind at Thomas Cook resorts, suggesting that an inflatable flamingo is more of a fun fad than a treasured travelling companion.



LAZING BY THE POOL

While relaxation is still a top holiday priority, Brits are becoming more interested in venturing beyond their resort and making a difference to the local community. Two in five say they are more likely to choose activities which benefit the local community than they were five years ago.



GOING IT ALONE

The solo backpacker epitomised by *The Beach* does not appeal to today's young generation of travellers. Over a third of 18-35 year olds are nervous about travelling alone, with one in five preferring to travel in small groups.

² When asked to reflect back on what they looked for in a holiday as an 18-25 year old (Thomas Cook survey 2019)

CHAPTER 1

Where are we going?

UK holidaymakers are busy hatching plans for a summer getaway in 2019, according to latest figures. However, with the political uncertainty around Brexit, many are biding their time before booking compared to previous years. Non-EU countries are on the holiday hit list, with Turkey among this summer's hottest destinations. All-inclusive deals, which give more security and peace of mind, are also going strong in this unpredictable year.



GETTING AWAY FROM IT ALL



The political uncertainty around Brexit is causing Brits to take a more cautious approach to booking their summer breaks and some are delaying doing so. But they are still planning to go away and, in fact, more Brits say that they are planning to holiday abroad than last year. That's the picture according to the numbers. More than half say they are more likely to travel outside of the UK compared to the last couple of years. This tallies with Morgan Stanley's recent study³ of UK holidaymakers, which found 73% plan to travel abroad within the next year, up from 68% in 2018.

The data also suggests that people's confidence in their own financial situation has not been rocked too severely by the year earmarked for the UK's departure from the European Union. Over a quarter of Brits claim that an overseas holiday is higher on their spending priorities compared to last year, while only 8% say it's lower.

A desire to travel may be clear, but there is a tentative attitude to booking. Thomas Cook website data shows that in 2019 customers visit its website an average of 15 times (equivalent to 2hrs 44mins) before booking. In 2017 the figure was 11 visits. A case of additional research by cautious consumers?

The ongoing political uncertainty of the last few years may well have left people fantasising about getting away from it all but, as usual, the weather can sometimes change our mindset. An unexpected bout of snow during the first weekend of February saw a one-off jump in flight-only bookings (up 18% on the Saturday and 44% on the Sunday compared to the same two days in 2018) as the country craved sunshine.

IN OR OUT OF EUROPE?

One trend that stands out in this summer's bookings is the shift towards non-EU destinations. Almost half (43%) of holidaymakers

say that they are more likely to travel outside of the EU compared to the last couple of years and nearly half (47%) of all Thomas Cook package holiday bookings are to locations that don't have the Euro. Compare this to the same time last year, when only 38% of bookings for summer 2018 were beyond the Eurozone. Turkey has risen up the ranks to become Thomas Cook's second most popular destination overall for Brits and a quarter of all Thomas Cook Airlines' bookings are to this Eastern Med hotspot.

The weakness of the Pound against the Euro is the most likely cause for holidaymakers' willingness to venture further afield; almost half of Brits say they have been watching exchange rates more closely than previous years. Some clever clogs anticipated instability - 18% say they bought foreign exchange during the course of 2018, at times when the rates were good.

Nearly half of package holidays this summer are to non-EU countries

GOING ALL-IN

Those who couldn't hold off any longer to book their summer trips have opted for the peace of mind of all-inclusive. With the cost of their travel, accommodation, food and drink locked in, they are less vulnerable to the unsteady British Pound. All-inclusive breaks are now among the top holiday priorities for half of holidaymakers. In fact, 66% of Thomas Cook's summer bookings are all-inclusive - a slight increase on last year. Morgan Stanley's findings back up this security-savvy approach; according to their data 61% of those planning to go abroad this year will opt for a package holiday.

³ Morgan Stanley Research, January 2019

THE YEAR'S MOST DESIRABLE DESTINATIONS

Turkey has been rising back up the ranks of the destination league table for the last few years. In 2019 it reaches a new peak, with flight-only bookings to Turkey seeing a 27% uplift compared to last summer. At this point in 2018, Turkey was at the number three spot in the list of the most popular summer getaways so it has already leapfrogged Greece this year. It would take pole position were it not for the fact that Spain, Canaries and Balearics are grouped together as one.

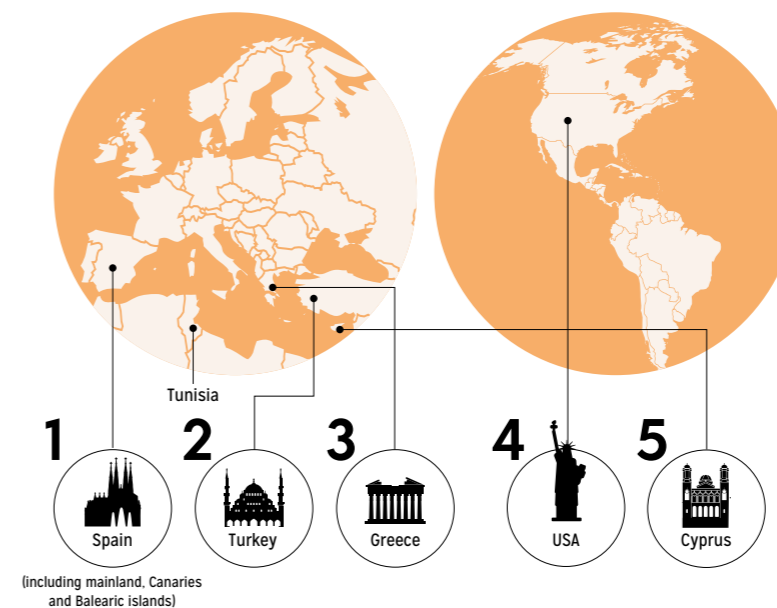
Aside from its attractiveness for being outside the EU, Turkey is a 2019 tourism hotspot thanks to the great value for money offered by its five-star resorts. Its diversity is an attraction in its own right. Alongside picture perfect sandy beaches, the snowy mountains, salt lakes, ancient ruins, blue lagoons and night bazaars all bring their own appeal. Food is a top priority

for tourists today (see Ch. 4) and Turkey's fertile lands mean plenty of mouth-watering fresh produce finds its way onto holidaymakers' plates - both in and out of the hotels.

The charms of Greece and its many islands continue to entice us, sitting at third position in the holiday rankings this year. The USA holds fast in fourth place with a diversity that's hard to match. Action-packed city breaks to New York and Las Vegas lure us across the pond and Florida remains a firm family favourite.

Knocking the Caribbean off the number five spot is Cyprus, which is popular partly due to its reputation as a destination for exotic weddings. Booking early to make sure guests save the date will be top of the list for newly-engaged couples so its position may dip later in the year.

TOP 5 SUMMER DESTINATIONS*



*Based on tour operator and flight-only bookings up until 28th February 2019



Tunisia has jumped up three spots since last year to 7th position

Package bookings to Tunisia have doubled compared to last year and flight-only bookings are up four-fold

TUNISIA RETURNS TO FAVOUR

Back in 2014, before the attacks in Sousse, Tunisia was Thomas Cook UK's third most popular year-round destination. Since Brits returned to the North African country in February 2018, following the change to the Foreign Office advice, Tunisia has climbed back up the league table. With many refurbished hotels, a number of initiatives to boost tourism standards and a range of family-friendly expeditions on its doorstep, it is now Thomas Cook's seventh most popular option this summer (up from tenth last year).

FOCUS ON FAMILIES



TUNISIAN TREATS

Family bookings are up 159% year-on-year to make up more than half (56%) of all Tunisia bookings

MOROCCAN MERITS

Families account for 58% of all Thomas Cook bookings to Marrakech

EGYPTIAN ODYSSEYS

56% of Thomas Cook bookings for Egypt come from families

MUMS AND DADS STAY HOME

Multi-generational holidays, where grandparents accompany parents and children abroad, are now the norm. Split-gen is the next big thing in the world of family holidays. This is when grandparents take the kids away while the parents stay home to have a break and save up precious annual leave. Over one third of Brits either send their kids away with the grandparents already or are considering doing so for future holidays.

MINI ADVENTURERS HEAD TO NORTH AFRICA

The typical family holiday used to revolve around the pool, with many not leaving the limits of the resort. Today, families want to show their children the wonders of the world and are turning to North African countries such as Egypt, Tunisia and Morocco for mini adventures. The epic scale, ancient history and desert landscapes have enough activities to suit even the most outgoing families. Trekking to the Atlas Mountains, tearing up the sand dunes in Tunisia, delving into the souks of Marrakech or moonlight belly dancing under the stars of the Agafay desert, are all on the bucket list for today's mini adventurers.



HUNGRY FOR BITE-SIZE BREAKS

Bite-size breaks of less than a week are no longer just for short-haul destinations as jetsetters try to get the most from their annual leave quota and satisfy their appetite for global travel. Thomas Cook Airlines is seeing an increasing number of trips for less than seven days to long-haul destinations, with Mexico, San Francisco and other cities in the States rocketing in popularity.

Savvy seasoned travellers know all the tricks to maximise their vacation time. Preferring not to be over-burdened with baggage, almost half admit to sometimes sharing a hold bag. Economy Light fares were introduced by Thomas Cook last October, offering the chance for long-haul travellers to go without any hold baggage. The service is particularly popular for breaks to New York, Orlando and Cape Town, suggesting passengers are buying what they need on arrival or only going for a short break.

Thomas Cook's recently-launched Sleeper Seat, which allows you to turn a row of economy seats into your own bed, is another travel hack for serial mini-breakers. Booking a Sleeper Seat can help maximise shut-eye so you're fresh for your trip and for your return to work. So far, two in three Sleeper Seat bookings are for inbound night flights, suggesting travellers want to get some rest so they feel refreshed for going back to work.



LONG-HAUL, SHORT BREAK

Percentage increase in flight-only bookings compared to last year:

5 nights in Mexico 171%

3 nights in Vegas 33%

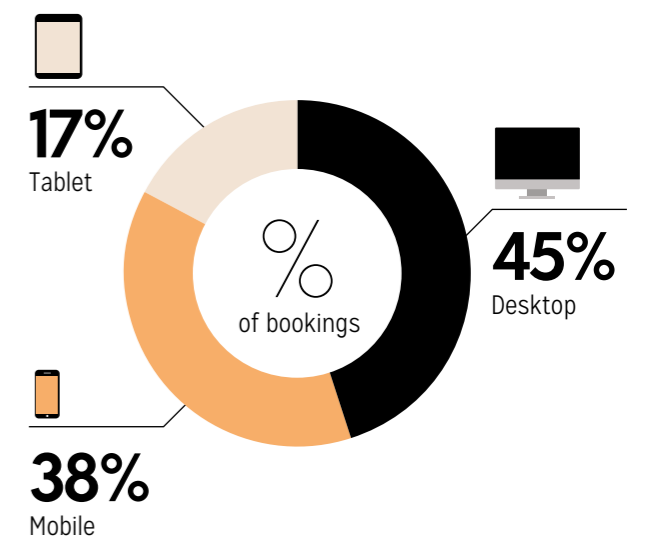
4 nights in San Fran 29%

2 nights in New York 13%

MORE MOBILE THAN EVER

For years we've been using our phones to research our holidays, with idle scrolling through images of tropical beaches helping to while away a long commute. In 2019, mobile searches on thomascok.com are more popular than desktop searches, accounting for 58% of website traffic.

Showing that phones are our go-to device for purchasing as well as browsing, 2019 is the year that customers became more confident booking their holidays on their phones. The percentage of bookings on mobile devices has increased by more than five times versus three years ago. Holidaymakers don't hesitate to spend big on their phones, with average purchases on mobile via the Thomas Cook website hitting £1,883 - marginally higher than the average desktop spend of £1,878.



CHAPTER 2

A new generation of package holidaymakers

Package holidays are experiencing a revival among a younger generation. But while the under 35s still crave fun in the sun, their holiday priorities differ from their parents' generation. The age of foam parties and Brits behaving badly abroad is a distant memory, with today's younger holidaymakers more likely to roll out a yoga mat at dawn than to roll into bed after a long night partying. The way they get their kicks has changed and package holidays have moved with the times to cater for increasingly cosmopolitan (and tamer) tastes.

REPACKAGING THE PACKAGE HOLIDAY

They may have a reputation for being "Generation Sensible", but stereotyping today's under 35s as clean living and conservative doesn't tell the full story. It's not that they don't enjoy a drink or a night out but their idea of what's fun has shifted from previous generations. As a result, their demands and expectations for their holidays are different. Wave goodbye to the in-your-face holiday reps leading the charge to the bar...

The last decade saw those in their twenties and thirties taking to booze cruises, waterparks and Full Moon Parties, epitomised by *The Inbetweeners*' escapades abroad. In contrast, today's "Millennials" and "Gen Z" (those aged between 18 and 35) want to look after their bodies, shy away from one-night stands and hangover fry-ups, and favour wheatgrass smoothies, (which make for better Instagram fodder). As a result, the traditional 18-30 package holiday, where clubbing was compulsory, cocktails came in goldfish bowls, and sunburnt beach bodies recovered by the pool, is no more.

As Thomas Cook's Club 18-30 closed its doors, a new era of package holiday has arrived on the scene. The recently-launched range of Cook's Club hotels cater for a healthier, calmer and more sophisticated audience, all at an affordable price. There are options for poolside yoga, nutritious dishes and contemporary cocktails designed by in-house mixologists. The look of resorts is "luxe-minimalist" - the ideal setting for those all-important holiday selfies.

By adapting its offering to meet the changing tastes of the younger market, Thomas Cook has seen a near 50% increase in the proportion of package bookings among this age group over the last five years.

1 in 4 Thomas Cook holiday bookings are made by 18-35 year olds



GEN Z IS HEALING, NOT PEELING

The contrast between what today's Gen Z (18-25 year olds) want from a holiday and what the older generations⁴ say they were after when they went abroad is stark. Gen Z would never dream of slapping on coconut oil to deepen their tans, while previous generations would think nothing of falling asleep in the sun after a night partying.

Young people today take much better care of their bodies, thanks to increased awareness of healthy lifestyle choices. Almost all said they go on holiday to relax and recharge. Exploring the local culture is at number three in their list of holiday priorities and enjoying local food and drink at number four. Nightlife is much further down their list, contrasting starkly to the wild nights of previous generations.

Of course, some things never change and 61% of 18-25s admit to drinking more when they are on holiday than when they are at home. However, they are more likely to be caught sipping an Aperol Spritz than downing cans of lager (see *Gastro Geeks*, p. 26).

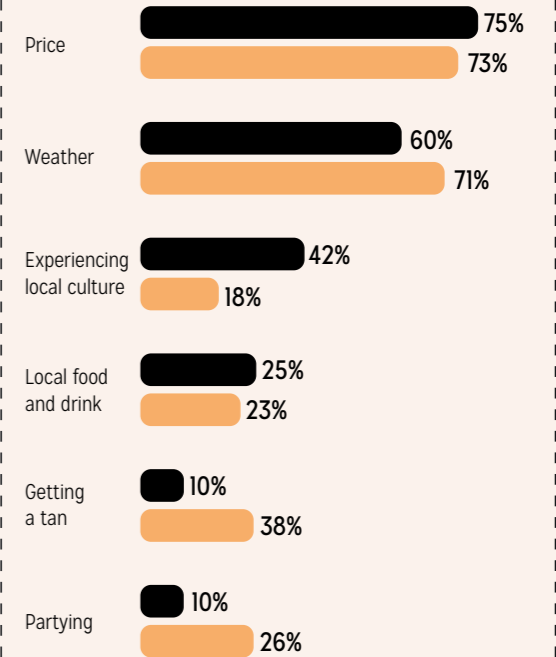
HOLIDAY PRIORITIES THEN VS NOW

NOW

What today's 18-25 year olds prioritise

THEN

What 18-25 year olds in previous generations prioritised



⁴ Thomas Cook research conducted in 2019 asked older generations to look back on their holiday priorities when they were 18-25 years old.

BACKPACKING ISN'T THEIR STYLE

Could it be that the age of the solo backpacker, epitomised by *The Beach* almost 20 years ago, is over? Young people today are less adventurous in their attitudes to travel and not nearly so keen to explore the world on their own, with over a third saying that they don't feel comfortable travelling alone. The days of large-scale group holidays are also past us, with one in five now preferring to travel in small groups with just one or two friends.

Perhaps reports of terrorism and political instability are leading more young holidaymakers to travel with a few trusted friends and opt for the creature comforts and the relative security of reputable resorts? It also appears that organising their own flights, accommodation and food is overwhelming for some, with three in ten favouring the "done for you" approach of a package holiday.

A third of 18-35 year olds are not happy to travel alone

DEATH OF THE HOLIDAY ROMANCE

In the nineties, Britpop was in its heyday and Blur was singing about holidays to Greece to meet "Girls who like Boys who like Girls who like Boys..." Today, the idea of hitting the dancefloor to couple up with a stranger is almost totally alien. Seven in ten 18-35 year olds (70%) have never had a holiday romance. And not just that, 50% of this age group say they have no interest in ever having one.

This age group are more focused on spending quality time with their holiday companions, with 88% seeing time abroad as a chance to be with friends, family or their partner.

Of course, it makes sense that in a pre-Tinder age, it was much more common to meet people in a bar or around the pool. But perhaps the death of the holiday romance is not such a bad thing, given the mischief that went on and potential heartbreak that previous generations experienced when on tour...

7 in 10 18-35 year olds have never had a holiday romance



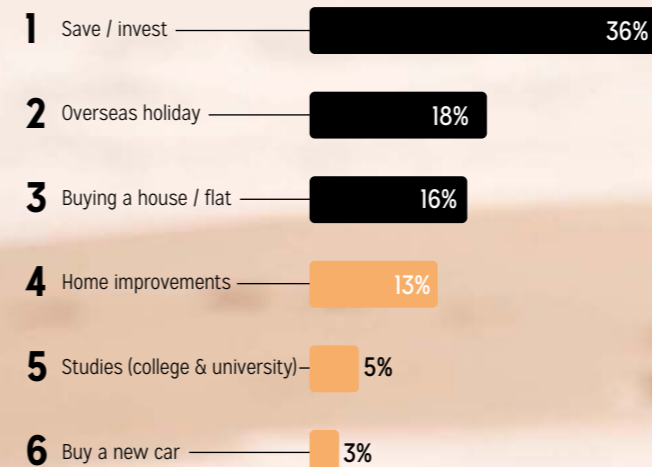
"GENERATION SENSIBLE" HAS MONEY ON THE MIND

Generation Sensible is living up to its name by being thrifty on trips abroad. For seven out of ten of those surveyed, price is the number one consideration when booking a holiday, prioritised above the weather, the culture, the food and the nightlife.

However, today's 18-35 year olds haven't forgotten the value of time abroad in the sun. Holidays came second on the list of their 2019 spending priorities, just below saving and investing and above buying somewhere to live, saving for university and buying a car.

The revival in popularity of package holidays makes sense when seen alongside their money-saving attitude. In fact, almost half (42%) favour a package holiday as their money goes further, while 39% appreciate the financial protection offered by tour operators.

TOP SPENDING PRIORITIES FOR 2019 AMONG THE UNDER 35S



CHAPTER 3

Think global, live local

Protecting the planet is increasingly interwoven into how we live and the decisions we make. But there is a long way to go until environmentally-friendly behaviour at home filters into the holiday mentality. Travel companies and hoteliers have a huge role to play in encouraging holidaymakers to behave more sustainably abroad.

TAKING A BREAK FROM SAVING THE PLANET?



Over the last ten years, Britain has woken up to the scale of the environmental issues facing us. Mass clean-ups on the beaches and in city centres, the growing presence of electric cars and public support for a boycott on unnecessary plastic packaging are just a few examples of changing attitudes. The BBC's *Blue Planet* strengthened the nation's resolve to take better care of the environment, with 88% of viewers saying they had changed their behaviour as a result of the series⁵.

Despite these good intentions, we don't always uphold environmentally-friendly practices when we're away from home. Most people admit to recycling less - 46% think it is easy to forget about recycling when on holiday⁶ - and they also use more disposable plastic and leave the lights and appliances on more often. It's easy to see how a haze of holiday bliss can blur the line between indulgence and wastage. We work hard for our holidays and understandably want to be a little more extravagant, treating ourselves to luxuries like hot baths brimming to the top, fresh towels every day, or generous trips to the hotel buffet. But balancing our desire to indulge ourselves with a little more collective awareness of our environmental impact could go a long way towards protecting the planet. The travel and tourism industry has a critical role to play here. Seven in ten Brits are in favour of more prompts from the industry to help them be environmentally-friendly on holiday.

The under-35s are most likely to relax their eco principles when abroad: only 16% are very likely to recycle on holiday, compared to 66% at home

⁵ Waitrose & Partners Food and Drink Report 2018-19
⁶ Package vs Independent Holidays UK. Mintel, April 2019

LOVING "LA VIDA LOCAL"

A hedonistic holiday, where the highlights are trips to waterparks and fancy restaurants, doesn't satisfy everyone like it used to. Today's tourists are increasingly aware that they have a responsibility to the destination they visit, and genuinely want to experience local life and make a contribution to the people, economy and environment. For a long time, specialist tour operators have been creating experiences that give back to communities. Now that demand from holidaymakers to make a meaningful difference to their holiday destination is increasing, the big hitters in the industry are getting involved.

In fact, two in five Brits say they are more likely to choose activities which benefit the local community in some way than they were ten years ago. Half of Brits are more likely to take a trip to a market to mingle with the locals and support independent businesses than they were a decade ago and a third are more inclined to opt for experiences that feature local traditions.

But what does it mean to engage with the local community? This summer, Thomas Cook is launching a range of "Love Local" experiences - a diverse range of things to see and do within local communities. All Love Local activities are designed to make a positive contribution to the area, improving the lives of local people and preserving traditions and locations that have remained unchanged for generations. By summer 2020, Thomas Cook expects to have over 70 such experiences on offer, with a long-term ambition of at least one Love Local option in every one of its destinations.

A few examples show how diverse these experiences are, yet authenticity and genuine connection sit at the centre of them all:

VENTURE INTO THE HEART OF A MAYAN VILLAGE COMMUNITY

on a guided tour in Yucatan in Mexico. The trip includes a Mayan ceremony, where you'll learn the healing powers of local plants, before joining residents for a refreshing dive into a beautiful cenote.

TASTE THE LOCAL DELICACIES OF LA PALMA

and hear why the banana plantations are so important to this Canary island's economy. The hike up to Mirador El Time will be well worth the steps for the panoramic view that awaits.

GET ON YOUR BIKE IN COSTA DORADA

to explore the stunning Catalan national parks, before visiting the family-owned vineyard in the heart of the Monstant wine region and hearing from the family themselves about how the wine is produced.

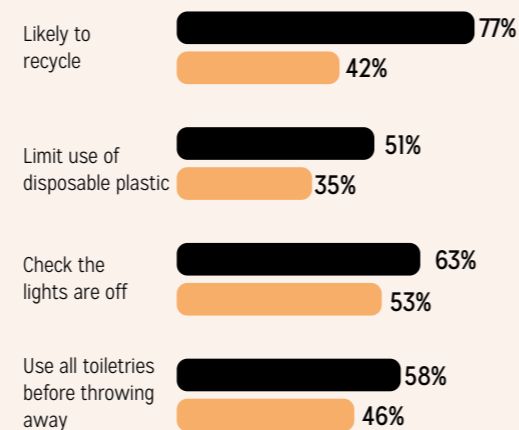
HOW GOOD ECO-INTENTIONS LAPSE ON HOLIDAY:

HOME

Eco habits of Brits at home

AWAY

Eco habits of Brits while on holiday



TURNAROUND TOURISM



In recent years we've heard a lot about the risk of overtourism, with Barcelona, Dubrovnik and Venice all hitting the headlines when locals protested about overcrowding and being priced out of their property market.

But that's not the full story when it comes to the impact of tourism on global destinations. Egypt, Tunisia, Turkey and Greece are all examples of countries which have experienced sharp drops in tourist numbers in recent years - either because holidaymakers were worried about the safety of travelling there or because the UK Government warned against it. All of these destinations are now recovering with the help of British visitors' spending power.

Tunisia is a case in point. Approximately half a million Brits visited Tunisia annually before the terrorist attack in Sousse in 2015. With tourism being the number one source of jobs in Tunisia, the closure of the country to British tourists had a huge impact on local businesses and employment.

However, the destination is now on track to return to popularity. Following the change in travel advice from the Foreign Office, 60,000 British tourists travelled with Thomas Cook in 2018 and an expected 90,000 are due to holiday there this year. This summer Thomas Cook flight-only bookings to Tunisia are up four-fold compared to last summer and package bookings have gone up 103%.

When planned and delivered responsibly, the benefits of tourism go way beyond just bringing people back to the hotels and local attractions. In the years when Tunisia was off limits to British customers, Thomas Cook resorts kept their doors open; not only catering for those nationalities whose governments didn't impose a travel ban, but working closely with hoteliers and other parties to keep amenities shipshape and locals upskilled. Over these years, the company helped set up initiatives to provide Tunisians with opportunities for a long-term career in tourism and hospitality, as well as laying the foundations for a more eco-friendly approach to tourism in Tunisia.

TUNISIA TRAINING IN NUMBERS

To date, more than 80 employees in six of Thomas Cook's own-brand hotels have taken part in a training programme to deliver the highest quality service in a sustainable way to customers. A separate initiative⁷ is improving hospitality training as part of the national curriculum in Tunisian hotel colleges.

170

The number of hotel employees trained in customer service and sustainability by the end of 2019

80

The number of students benefiting from specialist hospitality training at hotel colleges by the end of 2020

25

The number of tutors trained to mentor students during hotel internships by the end of 2020

TUNISIA'S TURNAROUND: VIEW FROM A LOCAL



When the terrorist attacks of 2015 hit Tunisia, the nation was in shock. We have always been a liberal and open society and have enjoyed a harmonious relationship with tourists since the 1960s so no one was expecting these awful events to occur.

The change in travel advice which stopped British holidaymakers travelling to the country had a huge impact on tourism and our national economy. Hotels and restaurants were short of business, while stall owners at bazaars, farmers, textile producers and shops were also affected. While some hotels adapted with a boost from the Russian market, it was the smaller family-run activity businesses, which catered for a largely British audience, that were hit the hardest.

After the news in 2017 that UK holiday companies would operate in Tunisia again, everyone was excited to welcome back the British tourists and the morale of all those involved in the tourism sector rose to great heights.

We find that the British are embracing all our country has to offer, whether sightseeing at our famed Roman ruins or embarking on a Saharan camel ride or a sand dune adventure. Their return is an open door for the rest of the European market. Gradually, visitors from Poland, Germany, Belgium and France are also returning.

Maher Daou, Tunisia Customer Service Manager, Thomas Cook



⁷ This is a partnership between Thomas Cook, Futouris e.V. (the German sustainability initiative in tourism) and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH (the German development agency). GIZ is carrying out this project in the course of a develoPPP.de programme on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ).

HOW CAN TOURISM TREAD MORE LIGHTLY ON THE PLANET?

There's a long way to go before tourism becomes eco-friendly and sustainable. The travel industry is a very complex global market, involving players of all sizes so it will take cooperation from all sides to bring greener practices into the mainstream. This complexity is not an excuse for complacency. The industry is starting to take steps in the right direction encouraging tourists to care for the local environment, educating resort staff on sustainable practices, and cutting down on waste.

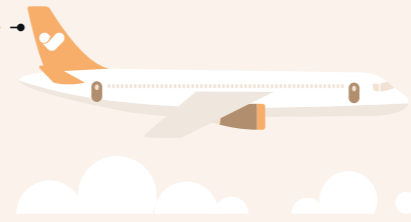
The measures Thomas Cook has started to put in place include:

AT THE HOTEL

- Educating staff on running resorts in a sustainable way
- Introducing environmental-themed games at Kids' Clubs
- Solar panels, electric bike hire and sustainable brands in the store at Casa Cook resorts
- A pilot to upcycle the 51,000 abandoned inflatables at Thomas Cook resorts

IN THE AIR

- A target of improving fuel efficiency 12% by 2020
- Removing plastic stirrers from planes
- Rolling out biodegradable bags for in flight duty-free purchases
- Replacing plastic wrapping for its Airshoppen catalogues with a sugarcane alternative this winter

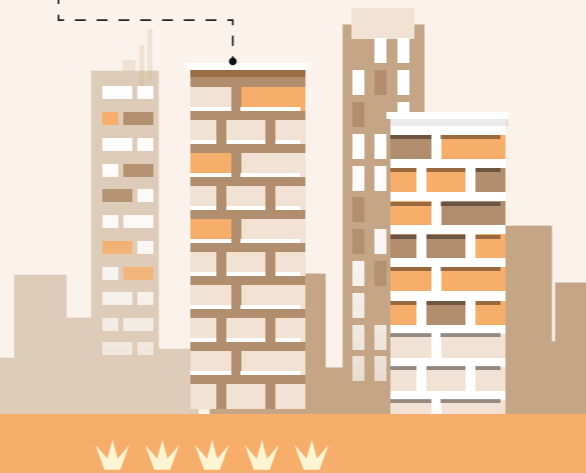


ON THE BEACH

- The amount of plastic litter going into the Mediterranean increases by 40%⁸ every summer, rising with the influx of tourists
- The Thomas Cook *noplaceforplastic* campaign aims to remove 70 million single-use plastic items from across the business by the end of the year - equivalent to 3,500 suitcases full

IN THE OFFICE

- Removed over one million plastic items across Thomas Cook offices around the world, including plastic cutlery and sauce sachets in canteens and introducing new bamboo coffee cups



BREATHING NEW LIFE INTO ABANDONED INFLATABLES

With an estimated 51,000 inflatables left behind at Thomas Cook resorts each summer, the tourism industry has an important part to play in blowing plastic waste out of the water (literally and metaphorically). To up its efforts here, Thomas Cook has paired up with sustainable bag brand Wyatt and Jack to transform discarded inflatables, lilos and abandoned children's armbands into trendy new products, such as washbags and tote bags.

A trial of this upcycling initiative is about to get underway at its Sunwing Kallithea Beach resort in Rhodes, with a view to expanding efforts if successful. This is just one of the initiatives from the Thomas Cook *noplaceforplastic* commitment, which aims to remove 70 million single-use plastic items from across its business by the end of 2019. So far, 12 million items have been abolished, with a further 69 million pinpointed for removal by the end of this summer.

51,000

The estimated number of inflatables left behind at Thomas Cook hotels every year



CHAPTER 4

Gastro geeks on tour

There has been a revolution in Britain's food scene. The UK's culinary knowledge and expertise has reached new heights and our appetite and pride for good quality local produce has grown. This has now extended to our holiday habits. When we're dining abroad, we expect to be blown away by what we eat and we choose our holiday destinations accordingly. Hotel restaurants are pushing the boundaries of creative catering to live up to increasingly high standards and establish themselves as destinations in their own right. Say hello to those discerning "Gastro Geeks"...

A NATION OF CULINARY CONNOISSEURS

Oh, how the UK's appetite has changed. Take a peek into the country's kitchens today and you will find people hand-rolling sushi, whipping up smoothies, grinding their coffee beans and making pasta from scratch. Shows like *MasterChef* and *The Great British Bake Off* and the growing influence of Instagram foodies have helped us to become increasingly knowledgeable (and some might say obsessive) about what we eat. Awareness around the quality of ingredients has gone mainstream, with organic food sales reaching record levels⁹ and an increasing desire to buy British.

What's more, the explosion in choice of worldwide cuisine in UK restaurants and the widespread availability of many international ingredients at British supermarkets has whetted appetites for foreign flavours.

The nation doesn't leave these tastes at home when they go abroad, expecting sophisticated dishes that are easy on the eye and explosive on the taste buds. Over half of holidaymakers say that the hotel food is more important to them today than five years ago when choosing where to stay.

As gastronomic expectations reach new levels, holiday companies are evolving with them. Gone are the days of package holidays providing beige food buffets, sad salads and greasy fry-ups. In a competitive market where the nation votes with their stomachs, hotels and restaurants that cater for British tourists must serve fresh local produce, offer a broad range of healthy, vegetarian and vegan options, and keep their bars well stocked with artisan spirits.

9 Soil Association, Organic Market Report 2018



THE ERA OF THE HIP HOTEL RESTAURANT

It used to be that only hotel guests would eat at the establishment's restaurant. Today, hotel restaurants have become destinations in their own right as those in the know head there for brunch, lunch, afternoon tea and dinner.

With hotels at home upping their game, people now expect a much higher standard of dining when they're on holiday. Nine in ten Brits state that the hotel restaurant influences the hotel they choose and nearly half say that the quality of the hotel food is more important than the destination's restaurant scene.

This has led to an explosion of creativity in hotel kitchens and behind the bar. You'd never imagine that a hotel from a tour operator would become the 'go-to' restaurant, but non-guests, including tourists and locals, flock to Thomas Cook's Casa Cook restaurants in Kos and Rhodes. The soon to open Ibiza and Chania hotels will also open their restaurant doors to non-guests.

Even family-friendly resorts are bringing the latest city trends to the beach with Thomas Cook's Sunwing resorts introducing Hawaiian poke bowls to its menus.

42%

of Brits say that hotel food is more important than the restaurant scene in the destination

41%

of holidaymakers have chosen a hotel because of its restaurant

28%

of travellers say the variety and quality of hotel food is more important than the destination itself



TAKE ME TO YOUR LOCAL PRODUCER

An increasing number of holidaymakers now ask about the origins of the ingredients on hotel restaurant menus, with 43% of 18-35 year olds wanting to know where their food comes from when on holiday.

Freshness and local produce play a major role in hotel cuisine across the world. Upholding the farm-to-fork philosophy, Thomas Cook's Casa Cook hotel in Kos has recruited its own farmer for this summer to grow seasonal fruit and vegetables right next to the hotel. Fresh-from-the-sea options caught by local fishermen also feature on its menu and the hotel's oils and skin products are made using fresh herbs grown onsite.

The provenance of ingredients is important but to really please diners, chefs also need to cook authentic dishes from the region. Almost 70% of Brits say they are keen to try local cuisine at the hotel and a quarter of UK holidaymakers say local food and drink are a top priority for their holiday this year. To satisfy this taste for all things local, chefs at Casa Cook design their menus with family recipes as their base, which are then given a modern twist. At their Rhodes resort, on the menu this summer are specialities from the region which include Briam, a traditional vegetable stew, Moussaka, and "Grandma's Potatoes" (a recipe from Kattavia village).

Thomas Cook also celebrates local heroes at its Cook's Club hotels for today's younger holidaymakers. At its soon-to-open hotels in Alanya and Marmaris, you will find Turkey's famous baked rice pudding, pide (a Turkish flatbread) and a selection of meze dishes on the menu.



ANY SPECIAL REQUESTS?

The majority of holidaymakers don't expect to take a break from healthy eating when away. Almost two thirds try to eat reasonably healthily when on holiday and a third eat fewer sweet desserts than five years ago. Over-indulgence on sugary treats is not an option for kids either; over half of parents want to see sugar-free and healthy food options at the hotel for their youngsters.

The other noticeable shift in the nation's eating habits is the explosion of vegetarian and vegan cuisine with one third of Brits having stopped or reduced their meat intake in recent years¹⁰ and 3.5 million vegans now in the UK¹¹. Restaurants and hotels abroad are quickly adapting to cater for today's tourists and gone are the days when there was only one option on the menu for those with dietary requirements. Today, one fifth of the food on the menu at Casa Cook is vegetarian and the Kos hotel has an entire menu for vegans featuring mouth-watering options such as homemade hummus, beetroot carpaccio and tempura-fried aubergine - it could tempt even the most loyal meat-lovers. Following the consumption of vegetarian dishes at Thomas Cook's Ocean Beach Club family resorts doubling from summer 2017 to summer 2018, vegetarian dishes are being introduced to all à la carte menus at Sunwing family hotels this summer.

7 in 10

look for healthy eating options at their hotel

COMPARED TO FIVE YEARS AGO

1 in 5

A fifth of Brits dine on more vegetarian food

1 in 3

A third eat fewer sweet desserts

COCKTAIL CONNOISSEURS

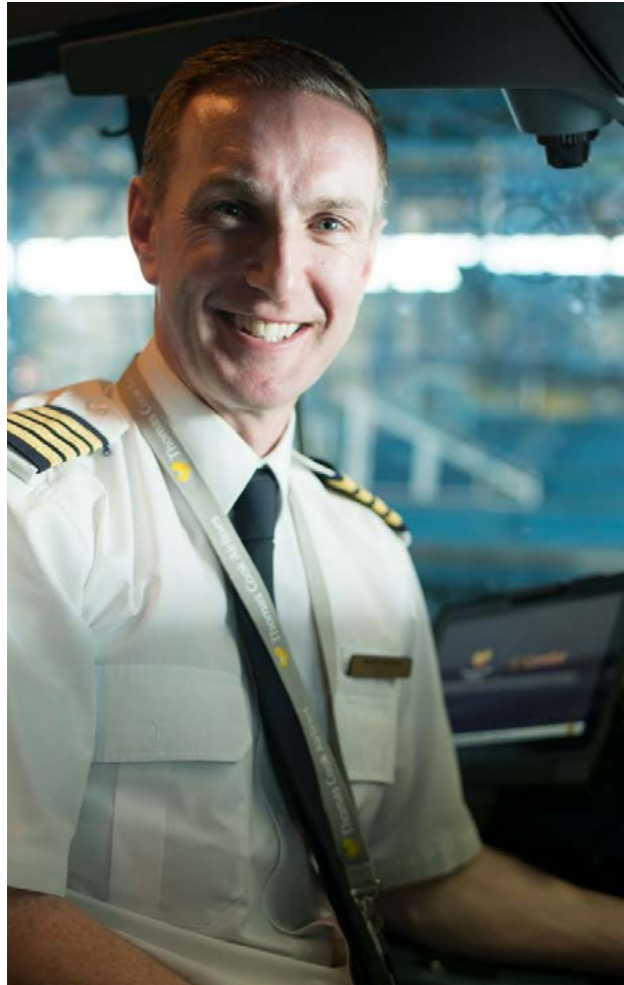
The British still like a tittle on holiday- 64% of 18 to 35 year olds admit to drinking more on holiday than at home. However, we not only want to eat local but to drink local: we are now a nation of cocktail connoisseurs. Casa Cook has responded by designing its own cocktails from local ingredients and concocting the majority of its syrups from fresh fruit, herbs and even seaweed. Highlights from its diverse drinks menu include the "Greek Martini", which features Greek gin and homemade olive brine, and local favourite Skinis Mastiha liqueur, paired with a scoop of melon sorbet and fresh basil.



¹⁰ Waitrose & Partners Food and Drink Report 2018-19
¹¹ Comparethemarket. 2018

FULL-TIME PILOT, PART-TIME CHEF: DAVE CRICHTON

When Thomas Cook Airlines pilot Dave Crichton made it to the finals of *MasterChef* 2018, he took inspiration from his travels to fly the judges to uncharted gastronomic territory.



How did your career as a pilot help you progress in *MasterChef*?

I love my job for the access it gives me to cuisines from all over the world. Even something as simple as bread has so many variations and it's a privilege to be able to try food from different countries. I'll try anything and never stop looking for inspiration. I recently sampled a few local treats in a petrol station in Barbados, for instance. It can be the most unlikely experiences that get me thinking "how can I reinvent this dish?"

My day job also helped me prepare for cooking complex recipes under time pressure. You have to spend a lot of time "armchair flying" as a pilot. For *MasterChef*, I used the same approach, visualising the steps I would go through to create my chosen dishes.

What is your favourite destination for food inspiration?

It has to be New York. It is such a melting pot of different cultures and cuisines. The restaurants are incredibly inventive. I recently took a trip to New York's Milk Bar where I tried their "cereal milk" flavour ice cream.

Do you have any favourite dishes from *MasterChef* that were inspired by your travels?

I concocted a meal based around the concept of sweetcorn tempura after seeing it on the menu in Vegas. I'd never seen this concept before so I thought it would stand out. I paired my version with guinea fowl to create a glorified Sunday roast that John Torode loved.

What's your favourite Thomas Cook Airlines meal?

It has to be the cooked breakfast. Often when you're flying you end up having meals at strange times to get onto local time. My strategy is to skip a meal or two until I'm really hungry and then indulge in a Full English just before landing.

Are there any new food or drink trends that are about to "take off"?

The Instagram generation are extremely health-conscious and want to know exactly what they're putting in their bodies, so low sugar options and veganism are big focuses in restaurants. I'm also seeing an increasing number of requests relating to allergies at my supper clubs. Accommodating these requests can be challenging and labour-intensive for commercial chefs.

What are your views on eating at the hotel when you're abroad?

Hotels can be great training grounds for up and coming chefs starting out. My favourite destination for hotel dining is Goa, where the curry is always out of this world. However, peer pressure often leads me to head out with the Captain or co-pilot for a beer and a bar snack instead of a hotel meal.

Any plans to quit the cockpit and take on a career in the kitchen?

No, my passion is cooking but flying is my career. I love combining the two and seeking out inspiration from all over the world.

FULL-TIME CHEF, PART-TIME PILOT: JAMES MARTIN

Two in five holidaymakers say that the on-board food is important to them when choosing their airline. Thomas Cook Airlines collaborates with James Martin to push the boundaries of in-flight cuisine.



such as tomatoes, parmesan and mushrooms, using different spices and cooking techniques so dishes pack a punch, without copious amounts of salt and sugar. We're also very committed to getting the best quality ingredients possible. For instance, our beef is British and we cook with artisan beers.

You then have the issue of storage, with the steam produced by reheating affecting taste and texture. We do a lot of testing and constantly evolve dishes to get them right. The whole process starts in my garage (which is also the Saturday Morning TV studio), where I begin experimenting with an idea for a dish. The Thomas Cook catering team then looks at different ways to create the meal at scale, before we work together to refine it and test it under pressurised conditions. It then goes to a customer panel. We also rely on cabin crew to give their feedback as they eat more of our food than anyone. And I do regular flights with the airline to make sure the in-air taste is consistent.

Which dishes are you most proud of creating for Thomas Cook?

A twice baked vegetarian cheese soufflé was a coup, given the challenges with air pressure and flavour that we face. I'm also a big fan of our hickory beef slow-braised in beer and the amazing curries we offer - they work well because spicing is so important to airline food.

How do changing trends in restaurants influence your menus?

We're always going to be more limited in what we can create due to the scale of airline food production, the logistical challenges and the fact that food tastes different in the air. However, we go as far as we possibly can to mirror restaurant dining experiences in the air. This is increasingly challenging as customers are so knowledgeable and their expectations are higher than ever.

What's next for the food on Thomas Cook flights?

Our vegetarian options are becoming really popular and so we're looking to expand the range. For me personally, I want to create a dish using prawns. Serving fish in the air is very tricky as the smell can filter through the whole cabin. However, I'm determined to find a way!

Why did you decide to get involved in airline food?

I've been a pilot myself for the last few years and I love flying so I was very intrigued when Thomas Cook approached me about revamping their on-board food. Five years into the collaboration, I have learnt a huge amount about the processes and techniques that work best and have enjoyed pushing the boundaries of mass-scale catering to exceed people's expectations of airline cuisine.

How do you make food taste great in the air - what's the secret?

Getting airline food to taste good is a complex process, involving lots of different factors. First, you have the challenges around taste as food served at 36,000 feet within a pressurised cabin doesn't taste like it does on the ground. We experiment with 'umami' rich ingredients (the recently discovered fifth taste),



**Thomas
Cook**

Thomas Cook Press Office
pressoffice@thomascook.com

+44 (0)1733 417 272