



BRAND REACTION INDEX 2026

TRAVEL DEEP DIVE



In this report we assess how well Britain's biggest travel brands emotionally connect

BRITISH AIRWAYS 

 TUI

easyJet

 eurostar

Jet2holidays 
Package holidays you can trust

virgin atlantic 


wizzair.com

 RYANAIR


Emirates

QATAR 
AIRWAYS القطرية





Despite cost-of-living pressures, 60% of UK adults have taken a foreign holiday in the last 3 years

That rises to 71% amongst 18-34s

Even when finances are stretched British families are prioritising spending on foreign trips

61%

Believe that going abroad for holidays is an important part of having a good time
vs 45% for non-parents (significantly lower)

“Our highlight of the last 12 months was a very nice big family holiday in France in the school Easter Holidays

Mum of children aged 8, 6, 4 & 1

59%

Feel pressured as a parent to give their child/children new experiences

“Our spending is prioritised on holidays and activities. More focus on experiences than personal possessions

Mum of girl aged 11 and boy aged 9





01

Setting the benchmark for emotional connection

Before exploring which travel brands perform best, we look at what Britain's strongest brands do differently



How to read this report:
BRI scores range from -100 to +100
The higher the score, the more emotionally connected your brand is

M&S Food is the most emotionally connected brand – No travel brand made it into the Top 10

Top 10 most emotionally connected brands 2026:



+51



+50



+49



+48



+47



+47



+43



+43



+42



+42

What can travel brands learn from Britain's most emotionally connected brands?

Despite coming from a range of sectors, our Top 10 brands each use some or all of the following lever to underpin connections



"Everyday intimacy" beats aspiration

Play on daily rituals, personal space and identity and leisure/downtime



Simplicity & clarity of proposition

They all stand for something instantly understandable. For example, M&S Food = quality you can trust



Trust built through consistency over time

Nearly all are long-established, highly consistent in delivery and resistant to trend-chasing



"Small joys" rather than big promises

These brands deliver low-stakes, repeatable pleasure that can easily be embedded into everyday life



Nostalgia & childhood link

Nostalgia acts as an emotional multiplier, in particular when linked to childhood memories

We've also analysed BRI scores by generation

Gen Z

1997-2008
Ages 18 - 29



Millennials

1981-1996
Ages 30 - 45



Gen X

1965-1980
Ages 46 - 61



Baby Boomers

1946-1964
Ages 62 - 80



02

Not all travel brands
emotionally connect
at the same level



From 131 brands, Jet2holidays is the only travel brand to make it into the Top 40

All these airline brands operate fleets of Airbus and Boeing aircraft and yet their ability to connect emotionally is dramatically different.



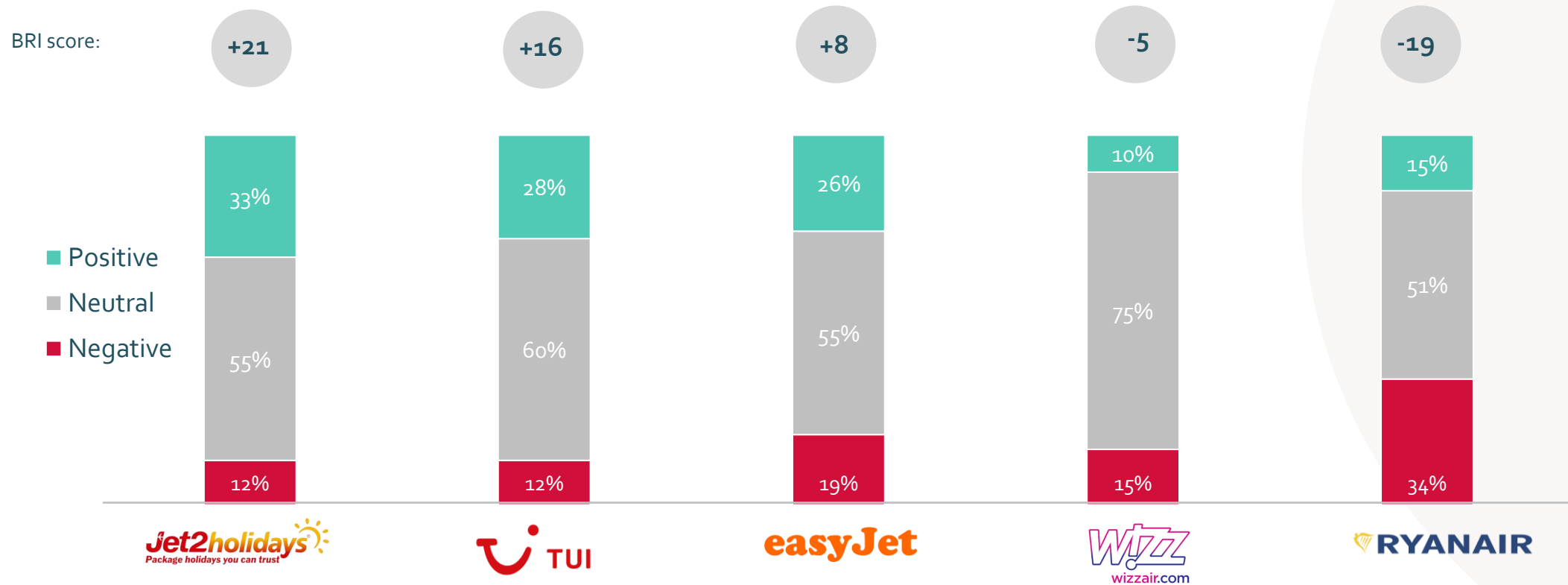
HOLIDAY COMPANIES AND LOW-COST AIRLINES

A range of 40 points separates **Jet2holidays**, our most emotionally connected brand from our least, **Ryanair**

Holiday operators Jet2 and TUI lead in this sector of the travel market

Jet2holidays and TUI balance strong positive reactions with limited negativity, while Wizz Air is defined by neutrality and Ryanair generates a significantly more negative response.

BRI (Brand Reaction Index) Breakdown: Travel & Transport



Creating viral moments and building trust through consistency of delivery have helped Jet2 deliver market leading results

"Nothing beats a Jet2holiday"



+21

Travel
average: +6

Fame through distinctiveness

A recognisable tagline and soundtrack have transformed Jet2's advertising into a widely shared cultural moment.

Trust through delivery

Customer-first service proves the brand promise, converting attention into emotional connection and growth.

2026 PROOF POINTS



BEST CUSTOMER EXPERIENCE
UK Customer Satisfaction Awards



BEST SHORT-HAUL OPERATOR
Travel Weekly Globe Awards



BEST SHORT-HAUL AIRLINE
Travel Weekly Globe Awards

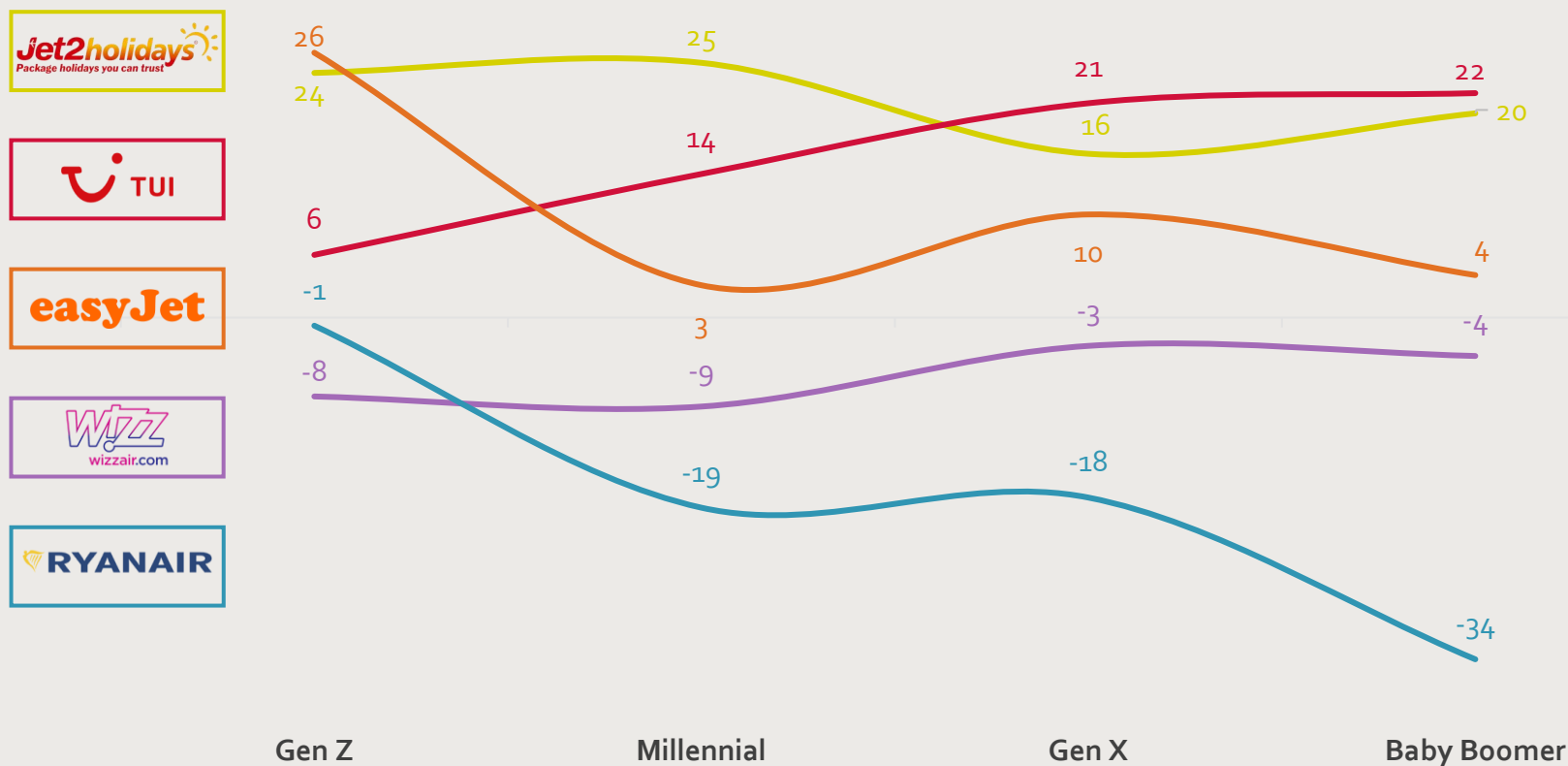


BEST TRADE-FRIENDLY BRAND
Travel Weekly Globe Awards

Jet2 wins by connecting across all generations

Jet2holidays has the broadest appeal, easyJet peaks among Gen Z, while TUI builds stronger connection among older travellers.

Brand Reaction Index score by generation



Strongest-performing brands don't just win with one generation - they **build broad, cross-generational appeal**. They resonate across life stages, rather than relying on a single audience.

Ryanair achieves negative BRI scores across all four generations but has a particular issue connecting with older people. **Wizz Air** in contrast has been able to deploy its low-cost model but **also connect emotionally** at similar levels **across the generations**

Emotion and ease are driving success for holiday brands



1

End-to-end Holiday Experiences: Owning the entire holiday journey

Holiday operators manage multiple touchpoints, from booking and flights to accommodation and support. This creates more opportunities to delight customers and build positive brand associations than brands that deliver just one part of the travel experience.

2

Certainty & Value: Reassurance matters more than ever

As travellers become increasingly price-conscious, brands that simplify planning and provide clear, packaged value are gaining favour. Holiday operators reduce complexity and risk, helping consumers feel more confident about their spending decisions.

3

Anticipation & Emotion: Selling experiences, not transportation

Holiday brands are closely associated with leisure, relaxation and time away with family and friends. These positive emotional associations generate stronger consumer reactions than brands whose primary role is simply to transport passengers from A to B.

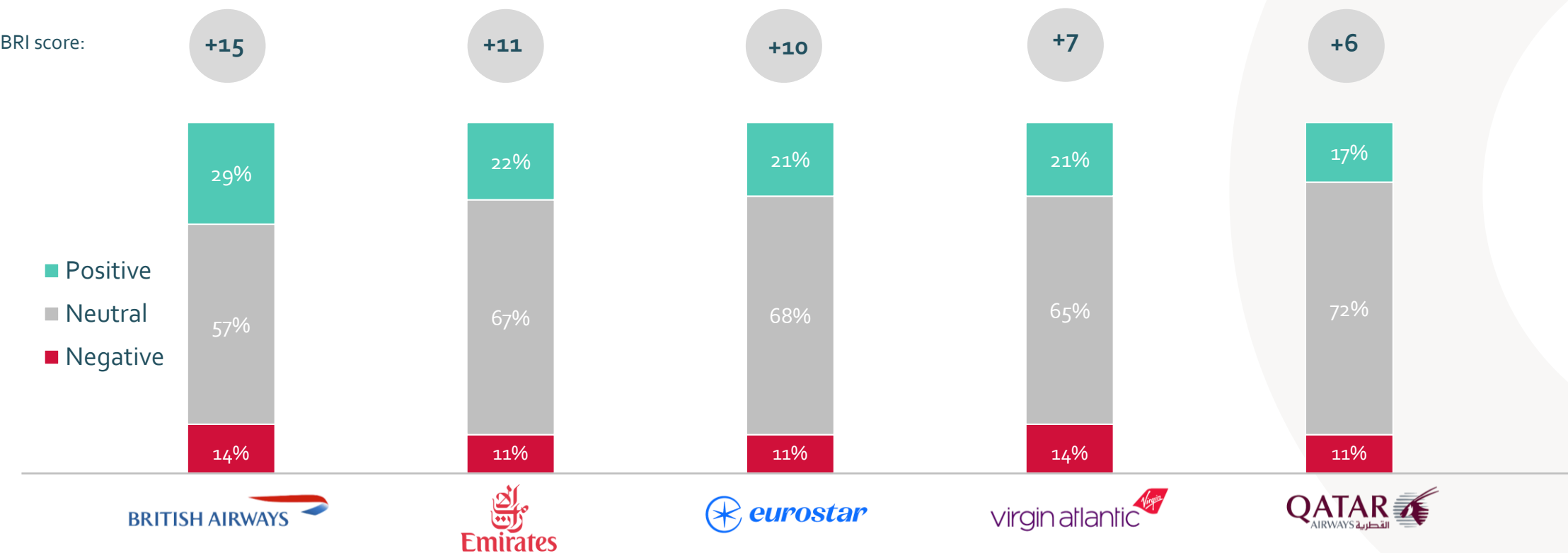
PREMIUM TRAVEL BRANDS

All five brands achieve a positive BRI score. Winning awards is no guarantee of emotional connection

British Airways leads premium brands

British Airways leads with the highest positivity score. Premium positioning alone does not guarantee positive emotion, with high levels of neutrality across brands including Gulf carriers that are often lauded in industry awards.

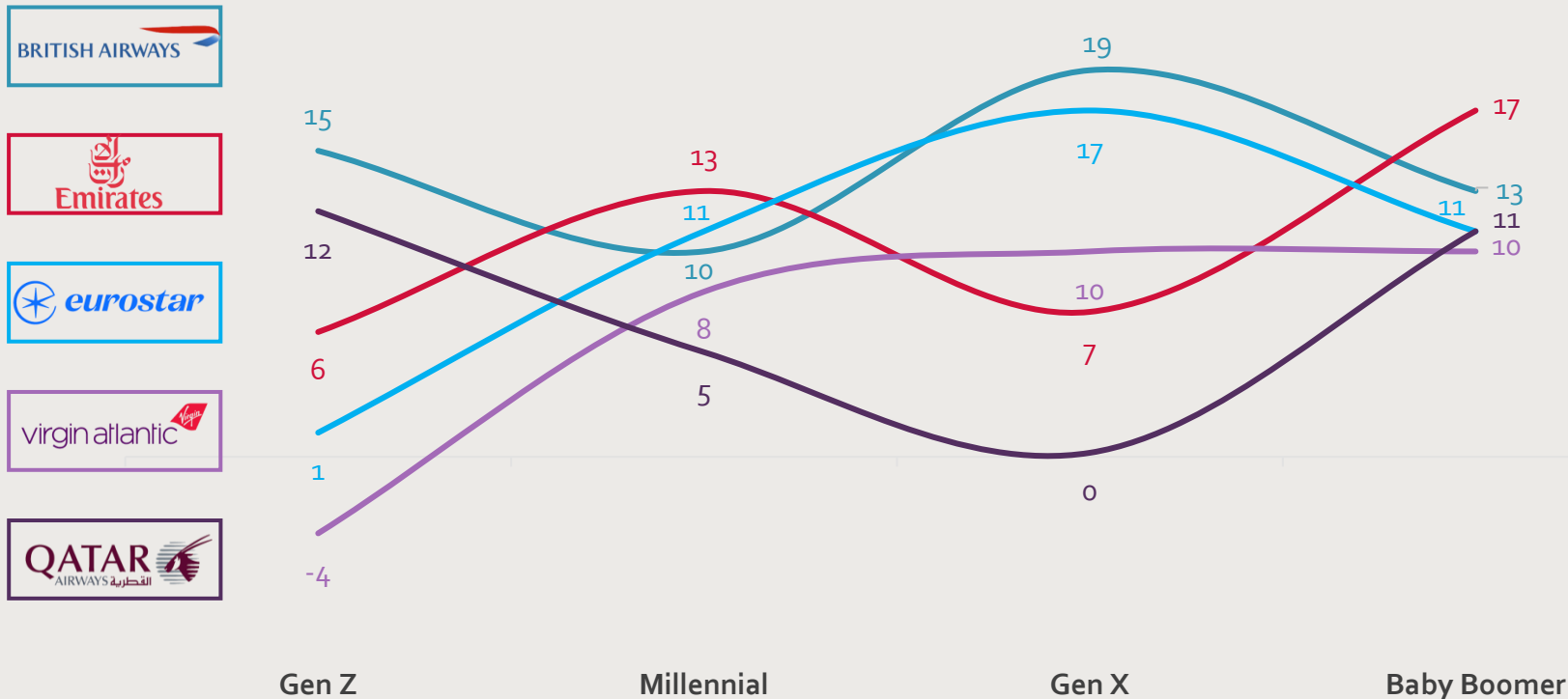
BRI (Brand Reaction Index) Breakdown: Travel & Transport



Premium travel brands strengthen their emotional connection with age, but no brand wins with every generation

British Airways leads among Gen X, Emirates peaks with Baby Boomers, and younger travellers remain less consistently engaged

Brand Reaction Index score by generation



British Airways performance is relatively consistent across generation, likely benefitting from having both short haul and long-haul operations from the UK.

Virgin Atlantic is struggling to connect with younger audiences despite innovation in its communications.

Eurostar also has work to do to improve connection with Gen Z. This will be particularly important as the channel tunnel is opened to competition for the first time.

British Airways leads premium through trust, loyalty and a richer travel experience

1

Trust & Familiarity: Reassurance matters in travel

British Airways combines premium credentials with widespread familiarity, helping build reassurance in a category where trust matters. This translates into the strongest positive response among premium brands.

2

Loyalty & Avios: Building an emotional connection beyond the flight

Avios gives BA a way to maintain the customer relationship between trips. Members can collect and spend Avios across flights, hotels, holidays and car rental, while tier benefits within The Club reward continued engagement.

3

Experience: Creating value beyond transportation

BA itself positions its proposition as “more than a flight”, helping shift the relationship from simply getting passengers from A to B towards a broader travel experience, via lounges, onboard food, drink, and service.

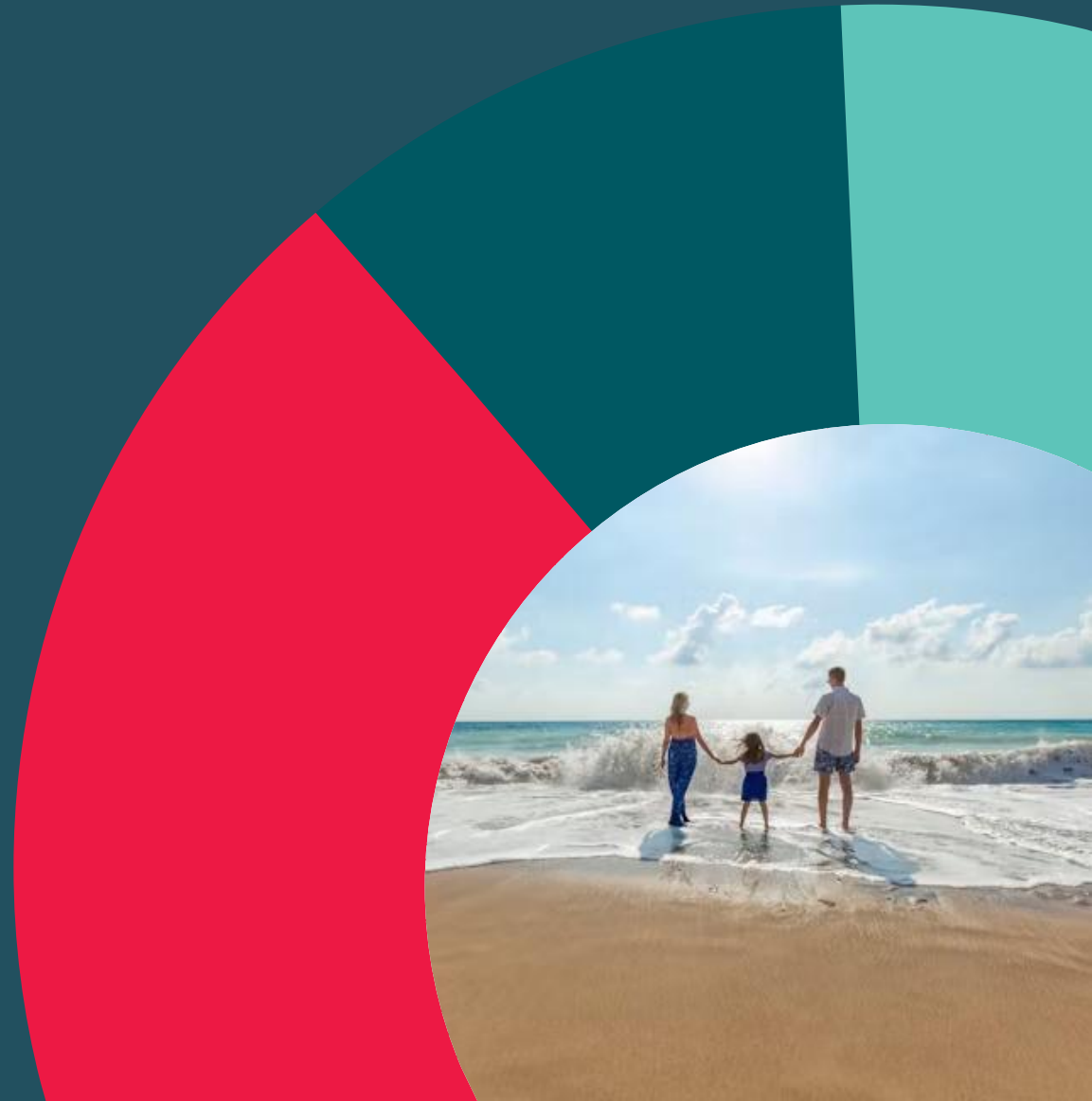


BA's announcement of huge investment in the refit of the A380 fleet featuring the largest ever Business Class cabin is a great example of how the brand continues to invest in passenger experience.

Travel brands build stronger emotional connection when they create experiences, not just journeys

- Across the travel sector, the **strongest-performing brands** are those associated with the **wider experience**, not simply the journey itself.
- Holiday operators benefit from **owning more of the customer experience, from planning and booking through to the holiday itself**. This gives brands more opportunities to create reassurance, anticipation and memorable moments.
- By contrast, **low cost airlines are often experienced more functionally** which can manifest at best as neutrality but for some generates negative emotional connection.

For brands that have lower BRI scores, the opportunity is to move beyond efficient delivery and create positive moments that consumers actively value and remember. The challenge, particularly for low-cost operators is delivering this alongside current pricing.



Guidelines for brands wanting to increase their BRI score



IN A SCREEN-SATURATED WORLD, PEOPLE VALUE THE TANGIBLE & HUMAN

Consumers are increasingly drawn to in-person, experiences or things that create human conversation or connection.

Look for ways to create community and real-world engagement rather than relying solely on digital interactions.



CULTURAL PRESENCE DRIVES RELEVANCE IN KEY MOMENTS

To show up in conversation, brands need to participate in culture and create impact through big moments & consistent presence.

Partnerships and conversations need to feel genuine and reinforce brand identity / brand values.



TRUST & NOSTALGIA ARE POWERFUL LEVERS IN THE MIDST OF UNCERTAINTY

In more cautious spending environments, brands must earn their place: reliability, value, and being on the customer's side.

Trust takes time to build and is earned. Bonus points if nostalgia echoes 'simpler times', bringing comfort and reassurance.

03

How do we assess
emotional
connection?



RED C's Brand Reaction Index methodology is rooted in key behavioural science principles

“ Humans make ‘fast and frugal’ decisions to arrive at ‘good enough’ choices

Gerd Gigerenzer / Behavioural Economist

The three shortcuts used to arrive at ‘good enough’ choices are:

Availability
Heuristic

The brand easily
comes to mind

Affect
Heuristic

The brand evokes
positive feelings

Processing
Fluency
Heuristic

The brand is easily
recognised
in-store/online, etc

How consumers feel today shapes the brands they choose tomorrow

Paul Ekman is an emotional psychologist who theorised that basic human emotions (happiness/enjoyment, sadness, anger, fear, surprise, disgust and contempt) are innate and shared by everyone, and that they are accompanied across cultures by universal facial expressions.

By defining the emotion that consumers attach to brands, we can quantify those that have stronger positive emotions vs. those that don't.

Why do we measure BRI for brands?

01

A strong positive emotion is recognised as impacting future purchase intent – the stronger the likelihood that the consumer will purchase / consume this brand in the future

02

BRI has been noted to be very reactive – e.g. it provides an assessment of current mood of consumers and highlights challenges that brands may face at a particular moment in time

03

The reactive nature of BRI means it is an early indicator of future metrics – e.g. a lowered BRI suggests other brand health measures will start to fall in the future





The 2026 BRI study includes 131 brands, covering a wide range of sectors

- Retail & Marketplaces
- Groceries
- Home & DIY
- Media & Entertainment
- FMCG Food & Drink
- Optical Services
- Gaming & Toys
- High Street food chains
- Property & Places
- Travel & Transport
- Financial Services & Investing
- Utilities
- Telecoms & Essential Services
- Technology & AI
- Sports
- Social Platforms





THANK YOU

For more information please contact:

Lea.trichet@redcresearch.co.uk

Richard.Barton@redcresearch.co.uk

REDCRESEARCH.COM

RED C RESEARCH & MARKETING LTD

DUBLIN: IMI Campus, Sandyford Road, Sandyford, Dublin 16, Ireland, D16 X8C3

LONDON: 5.01 The Place, 175 High Holborn, London, WC1V 7AA