

## Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“There appears to have been a subtle shift in consumer and media perceptions over the past five years. The concept of a ‘staycation’, rather than a reluctant replacement for a ‘proper holiday’ (abroad) has acquired the connotation of a lifestyle choice and a marketing/PR tool used to lend domestic tourism extra cachet. The UK is now less likely to be seen as a ‘second best’ destination.”  
John Worthington, Senior Analyst

This report looks at the following areas:

- How can domestic tourism capitalise on the shortening of holiday durations?
- What are the key opportunities in urban, coastal and rural domestic tourism?
- How can domestic tourism attract more visitors out of season?

Although now around two million trips below the ‘staycation’ peak of 2009, domestic tourism remains well ahead of its pre-recessionary levels. However, as the UK economy enters recovery the domestic market faces the prospect of renewed competition from holidays abroad.

A key strength and selling-point of domestic tourism is that, although it cannot compete with overseas destinations as regards to weather, it offers a greater range of holidays than the overseas market which tends to be dominated by ‘fly and flop’ beach breaks, and is ideally placed to meet the demands of a growing number of consumers for a regular varied diet of short leisure breaks.

This report analyses market trends, looks at leading operators and tourist board activity and includes consumer analysis including levels of domestic holiday taking and frequency of short breaks and longer holidays, regions visited, domestic tourism activities and future intentions to take holidays within the UK.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Introduction

Definition

Abbreviations

### Executive Summary

The market

Figure 1: Domestic holidays volume forecast 2014-19

Figure 2: Domestic holidays value forecast 2014-19

Domestic tourism under pressure but staycation trend is far from over

Market factors

Confidence returns but wage growth is low

Figure 3: GfK/NOP Consumer Confidence Index, January 2011-August 2014

Figure 4: UK average weekly earnings (excl bonuses)\* vs CPI inflation, percentage change year-on-year, January 2013-June 2014

Pound's revival is a threat to four or more night UK holidays

Honey, I shrunk the holidays

Figure 5: Average length of domestic holiday visits, 2007-13

Companies, brands and innovation

Holiday centres

Self-catering rentals

Hotels

Making waves

The consumer

Nearly half of adults take a UK holiday

Figure 6: Types of holiday taken in the past 12 months, June 2014

Affluent over-45s are multiple short breakers

Figure 7: Number of short breaks taken in the UK in the past 12 months, June 2014

Domestic holidays are 'doing holidays'

Figure 8: Activities done on UK holidays in the past 12 months, June 2014

Consumer intentions remain positive towards domestic holidays

Figure 9: Holiday taking over the past 12 months vs intentions to take a holiday in the next 12 months, June 2014

What we think

### Issues and Insights

How can domestic tourism capitalise on the shortening of holiday durations?

The facts

The implications

What are the key opportunities in urban, coastal and rural domestic tourism?

The facts

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## The implications

How can domestic tourism attract more visitors out of season?

The facts

The implications

## Trend Application

Secret, Secret

Open Diary

Never Say Die

## Market Drivers

### Key points

#### UK economy returns to pre-crisis size

Figure 10: UK GDP growth, Q1 2008-Q1 2014

Figure 11: GfK/NOP Consumer Confidence Index, January 2011-August 2014

#### Growth at both ends of spectrum

Figure 12: How respondents would describe their financial situation, May 2014

Figure 13: UK average weekly earnings (excl bonuses)\* vs CPI inflation, percentage change year-on-year, January 2013-June 2014

#### Overall holiday market context

Figure 14: Domestic and overseas holiday volumes, 2008-13

Figure 15: Domestic vs overseas holidays expenditure, 2008-13

#### Spanish revival gathers pace

Figure 16: Top 15 overseas destinations for UK holidaymakers, 2008-13

#### Sterling rise presents growing challenge

Figure 17: Sterling exchange rate, 2009-14

#### Spanish prices drop by a third since 2009

Figure 18: Holiday living costs\*, comparison of leading resorts, 2014

Figure 19: Post Office City Costs Barometer, 2014

#### Domestic visitor attractions up in 2013

Figure 20: Year-on-year percentage change in visits to attractions in England, 2009-13

Figure 21: Top 10 free visitor attractions in England, by visitor numbers, 2009-13

Figure 22: Top 10\* paid visitor attractions in England, by visitor numbers, 2009-13

#### Prices stabilise but high fuel costs are 'new normal'

Figure 23: Petrol/diesel costs, January 2009-August 2014

#### Volatile weather patterns continue

Figure 24: Mean UK annual temperatures and rainfall, 1960-2013

Figure 25: UK weather trends, 2008-13

#### Growth at both ends of spectrum

Figure 26: Trends in the age structure of the UK population, by gender, 2009-19

#### BME growth and tourism

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Who's Innovating?

### Key points

- Sounds of Britain
- The power of nostalgia
- Accessibility
- Technology - immersion
- Technology - escape
- Rural adventures
- Dark sky thinking

## Market Size and Forecast

### Key points

#### Market sees slight decline in 2012/13

Figure 27: Domestic tourism volume, expenditure, nights and average spend in Great Britain, 2008-18

#### New breed of bargain hunters

#### 2014 and beyond

#### Forecast

Figure 28: Domestic holidays volume forecast 2014-19

Figure 29: Domestic holidays value forecast 2014-19

#### Forecast methodology

## Segment Performance

### Key points

#### Holidays get shorter and shorter

Figure 30: Average length of domestic holiday visits, 2007-13

Figure 31: Short vs long holidays in Great Britain, by volume, 2008-13

Figure 32: Short vs long holidays in Great Britain, by value, 2008-13

#### One in five UK trips are to South West

Figure 33: Domestic holiday volumes in Great Britain, by region visited, 2008-13

#### Urban tourism trend

Figure 34: Holiday volumes in Great Britain, by type of destination\*, 2008-13

#### Other cities taking market share from London

Figure 35: Top 20 English towns, by volume of holiday visits, 2010-13

#### Camping & caravanning disappointment

Figure 36: Number of domestic holiday trips in Great Britain, by type of accommodation, 2010-13

#### Peaks and troughs

Figure 37: Holiday volumes in Great Britain, by month, 2009-13

Figure 38: Holiday volumes in Great Britain, percentage share by quarter, 2013

#### Age profile of domestic tourism

Figure 39: Age composition of domestic and overseas holidays taken by people aged 16+, 2013

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 40: Age composition of domestic holidays taken by people aged 16+, 2008-13

Socio-economic profile of domestic tourism

Figure 41: Socio-economic composition of domestic holidays, 2008-13

## Companies and Products

Bourne Leisure Ltd

Company overview

Financial information

Figure 42: Bourne Leisure Holdings Ltd, 2011 and 2012

Recent activity

Butlins Skyline Ltd

Company overview

Financial information

Figure 43: Key financials, Butlins Skyline, 2011 and 2012

Recent activity

Marketing and promotional activities

Haven Holidays

Company overview

Financial information

Figure 44: Key financials, Butlins Skyline, 2011 and 2012

Recent activity

Marketing and promotional activity

Warner Leisure Hotels

Company overview

Recent activity

Center Parcs

Company overview

Financial information

Figure 45: Key financial, Center Parcs, 2012 and 2013

Recent activity

Marketing and promotional activities

Hoseasons/Wyndham Vacation Rentals

Company overview

Financial information

Figure 46: Key financials, The Hoseasons Group Limited, 2011 and 2012

Recent activity

Marketing and promotional activity

Premier Inn

Company overview

Financial information

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 47: Key financials, Whitbread Plc, 2013 and 2014

- Recent activity
- Marketing and promotional activity
- Shearings Holidays
- Company overview
- Financial information

Figure 48: Key financials, Shearing Holidays Ltd, 2012 and 2013

- Recent activity
- Marketing and promotional activity
- VisitEngland
- Overview
- Marketing and promotional activity
- Strategic framework/outlook

Figure 49: VisitEngland Action Plan review, 2013

- VisitScotland
- Overview
- Marketing and promotional activity
- Strategic framework/outlook
- Visit Wales
- Overview
- Marketing and promotional campaigns
- Strategic framework/outlook
- NI Tourist Board
- Overview
- Marketing and promotional campaigns
- Strategic framework/outlook
- London & Partners
- Overview
- Recent activity

Figure 50: London: Domestic visits, nights and spend, 2009-13

- Marketing and promotional campaigns

## Channels to Market

- Key points
- Nearly half of domestic holidays now booked online
  - Figure 51: How domestic holidays were booked, by volume of trips, 2011-13
  - Figure 52: Percentage of domestic holidays booked online, 2007-13

## Holiday Taking

- Key points
- UK is tops for short breaks but trails overseas for four or more night hols

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 53: Types of holiday taken in the past 12 months, June 2014

Figure 54: Domestic and overseas holidays taken in the past 12 months, by socio-economic group, June 2014

## Domestic holidays are clear choice for young families

Figure 55: Domestic and overseas holidays taken in the past 12 months, by age group, June 2014

Figure 56: Domestic and overseas holidays taken in the past 12 months, by life stage, June 2014

Figure 57: Domestic and overseas holidays taken in the past 12 months, by age of children, June 2014

## The multi-generation family

### Number of Domestic Holidays Taken

#### Key points

##### Who are the multiple short breakers?

Figure 58: Number of short breaks taken in the UK in the past 12 months, June 2014

Figure 59: Number of longer holidays taken in the UK in the past 12 months, June 2014

##### Domestic/overseas holiday crossover

Figure 60: Number of domestic holidays taken by those who holidayed abroad in past 12 months, June 2014

### UK Regions Visited On Holiday

#### Key points

##### Three in 10 domestic tourists visit South West

Figure 61: Holiday regions visited in the past 12 months, June 2014

##### Regional catchment areas

Figure 62: Holiday regions visited in the past 12 months, by region of residence\*, June 2014

##### Short break and longer holiday regions

Figure 63: Holiday regions visited in the past 12 months, by those who have taken short breaks and longer holidays, June 2014

### Domestic Holiday Activities

#### Key points

##### The active dimension

Figure 64: Activities done on UK holidays in the past 12 months, June 2014

##### Activities by demographics

##### Gender

##### Socio-economic group

##### Age

##### Lifestage and presence of children

##### Short break and longer holiday activities

Figure 65: Activities done on UK holidays in the past 12 months, by those who have been on short breaks and longer holidays, June 2014

##### Regional strengths & weaknesses

Figure 66: Activities done on UK holidays in the past 12 months, by regions visited, June 2014

Figure 67: Activities done on UK holidays in the past 12 months, by regions visited, June 2014 (continued)

### Perceptions of the UK as a Holiday Destination

#### Key points

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Advantages

Disadvantages

## Domestic Holiday Plans Over the Next 12 Months

Key points

Staycation appears here to stay

Figure 68: Intentions to take a holiday in the next 12 months, June 2014

Figure 69: Holiday taking over the past 12 months vs intentions to take a holiday in the next 12 months, June 2014

Figure 70: Holiday taking over the past 12 months vs intentions to take a holiday in the next 12 months, by selected demographics, June 2014

Financial expectations and holiday intentions

Figure 71: Financial expectations over the next 12 months, June 2014

Figure 72: Intentions to take a UK holiday in the next 12 months, by financial expectations over the next 12 months, June 2014

## Appendix – Market Size and Forecast

Figure 73: Forecasts for domestic tourism, volume, 2014-19

Figure 74: Forecasts for domestic tourism, value, 2014-19

## Appendix – Holiday Taking

Figure 75: Types of holiday taken in the past 12 months, by demographics, June 2014

Figure 76: Types of holiday taken in the past 12 months (cont) – UK, by demographics, June 2014

Figure 77: Types of holiday taken in the past 12 months (cont) – Overseas, by demographics, June 2014

## Appendix – Number of Domestic Holidays Taken

Figure 78: Number of short breaks taken in the UK in the past 12 months, by demographics, June 2014

Figure 79: Number of longer holidays taken in the UK in the past 12 months, by demographics, June 2014

## Appendix – UK Regions Visited On Holiday

Figure 80: Holiday regions visited in the past 12 months, by types of holiday taken in the past 12 months, June 2014

Figure 81: Holiday regions visited in the past 12 months, by types of holiday taken in the past 12 months – UK, June 2014

Figure 82: Holiday regions visited in the past 12 months, by types of holiday taken in the past 12 months – Overseas, June 2014

Figure 83: Holiday regions visited in the past 12 months, by number of short breaks taken in the UK in the past 12 months, June 2014

Figure 84: Holiday regions visited in the past 12 months, by number of longer holidays taken in the UK in the past 12 months, June 2014

Figure 85: Most popular holiday regions visited in the past 12 months, by demographics, June 2014

Figure 86: Next most popular holiday regions visited in the past 12 months, by demographics, June 2014

Figure 87: Other holiday regions visited in the past 12 months, by demographics, June 2014

## Appendix – Domestic Holiday Activities

Figure 88: Activities done on UK holidays in the past 12 months, by types of holiday taken in the past 12 months, June 2014

Figure 89: Activities done on UK holidays in the past 12 months, by types of holiday taken in the past 12 months (cont) – UK, June 2014

Figure 90: Activities done on UK holidays in the past 12 months, by types of holiday taken in the past 12 months (cont) – Overseas, June 2014

Figure 91: Activities done on UK holidays in the past 12 months, by number of short breaks taken in the UK in the past 12 months, June 2014

Figure 92: Activities done on UK holidays in the past 12 months, by number of longer holidays taken in the UK in the past 12 months, June 2014

Figure 93: Activities done on UK holidays in the past 12 months, by most popular holiday regions visited in the past 12 months, June 2014

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Domestic Tourism - UK - September 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 94: Activities done on UK holidays in the past 12 months, by next most popular holiday regions visited in the past 12 months, June 2014

Figure 95: Most popular activities done on UK holidays in the past 12 months, by demographics, June 2014

Figure 96: Next most popular activities done on UK holidays in the past 12 months, by demographics, June 2014

Figure 97: Further activities done on UK holidays in the past 12 months, by demographics, June 2014

Figure 98: Other activities done on UK holidays in the past 12 months, by demographics, June 2014

Figure 99: Least popular activities done on UK holidays in the past 12 months, by demographics, June 2014

### Appendix – Domestic Holiday Plans Over the Next 12 Months

Figure 100: Intentions to take a UK holiday in the next 12 months, by demographics, June 2014

### Appendix – Expected Financial Situation

Figure 101: Financial expectations over the next 12 months, by demographics, June 2014

Figure 102: Financial expectations over the next 12 months (cont), by demographics, June 2014

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)