

## Domestic Tourism - UK - October 2015

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.



“London continues to shine brightly as the primary UK tourist destination. However, there is still an opportunity for other major UK cities to highlight their holiday appeal to UK residents by putting far more emphasis on the unique cultural touchstones and experiences that each city offers”.

– Rebecca McGrath, Leisure Analyst

### This report looks at the following areas:

- Promoting destinations outside London
- The role of accommodation in domestic tourism

This report examines holidays taken in the UK by its residents. These must constitute a stay of at least one night and do not include business trips, visits to stay with friends and relatives or stays solely for events such as weddings or funerals.

Data on the size and segmentation of the market are for Great Britain rather than the United Kingdom (ie Northern Ireland is not included).

An adult, for the purposes of Mintel's research, is anyone aged 16 years or over.

The standard travel and tourism definitions used in the terminology of this report are as follows:

- Tourism is any travel which involves an overnight stay away from home.
- A holiday is a subjectively defined form of tourism, as defined by the tourist in response to surveys such as the IPS. A holiday can be distinguished from other leisure travel such as visits to friends and relatives (VFR) or shopping trips.
- A long holiday is a holiday of four nights or more away from home; a short break is a holiday that involves one to three nights away from home.
- Short-haul refers to air holidays within Europe, dominated by flights to Mediterranean resorts but including the Canaries, which are treated as a part of the Spanish market. Long-haul, therefore, refers to holidays outside Europe.

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

China  
+86 (21) 6032 7300

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 - October 2015

**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

### Overview

What you need to know

Covered in this report

### Executive Summary

Market up after decline in 2014

Figure 1: No. of domestic holidays forecast 2015-20

Over a quarter took a city break

Figure 2: Type of domestic holiday taken, July 2015

1-3 months is most common booking time

Figure 3: Booking time, July 2015

Cost of accommodation is most important factor influencing destination choice

Figure 4: Domestic holiday destination influencing factors, July 2015

People are revisiting holiday destinations

Figure 5: Domestic holiday behaviour, July 2015

Many also wish to discover new parts of the UK

Figure 6: Attitudes towards domestic holidays, July 2015

What we think

### Issues and Insights

Promoting destinations outside London

The facts

The implications

The role of accommodation in domestic tourism

The facts

The implications

### The Market – What You Need to Know

Market up after decline in 2014

Market volume to decline slightly

Slight increase in holiday length

London well ahead

Strong pound encouraging people abroad

Growth in visitor attraction visits

Wet 2014 dampens domestic holidays

### Market Size and Forecast

Market up after decline in 2014

Figure 7: Domestic tourism volume, value and average spend in Great Britain, 2009-20

Market forecast to be steady

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Domestic Tourism - UK - October 2015

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.

## Forecast

Figure 8: No. of domestic holidays forecast, 2015-20

Figure 9: Domestic holidays value forecast, 2015-20

## Segment Performance

### Slight increase in holiday length

Figure 10: Average length of domestic holiday visits, including long and short holidays, 2010-14

Figure 11: Short vs long holidays in Great Britain, by value, 2010-14

### London well ahead

Figure 12: Most visited English cities & towns – 3 year average (2012-14) by UK residents, holiday trips

## Market Drivers

### Domestic holidays down as people head overseas

Figure 13: No. of domestic and overseas holidays, 2009-14

### Domestic expenditure declines reflects volume decrease

Figure 14: Domestic vs overseas holidays expenditure, 2009-14

### The strong pound encourages people abroad

Figure 15: Sterling exchange rate against selected major currencies, 2010-15

### Growth in visitor attraction visits

Figure 16: Year-on-year percentage change in visits to attractions in England, 2011-14

Figure 17: Top 10 free visitor attractions in England, by visitor numbers, 2011-14

Figure 18: Top 10\* paid visitor attractions in England, by visitor numbers, 2011-14

### Wet 2014 dampens domestic holidays

Figure 19: UK weather trends, 2009-14

## Key Players – What You Need to Know

VisitEngland offers real time advice for travellers on Twitter

VisitBritain launches 360-degree virtual tours

British Museum takes people back to Bronze Age

Northern Ireland looks to capitalise on Game of Thrones

Banksy's Dismaland boosts Weston-super-Mare tourism

VisitWales launches 'Year of ...' campaign

## Launch Activity and Innovation

VisitEngland offers real time advice for travellers on Twitter

VisitBritain launches 360-degree virtual tours

The British Museum takes people back to the Bronze Age

Northern Ireland aims to capitalise on Game of Thrones

Banksy's Dismaland boosts Weston-super-Mare tourism

Wales launches 'Year of ...' campaign

## The Consumer – What You Need to Know

Half of people took a domestic holiday in last year

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

## Domestic Tourism - UK - October 2015

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.

Younger people are taking shorter holidays  
Over a quarter took a city break  
1-3 months is most common booking time  
Own car/motorbike preferred choice of transport  
Cost of accommodation is the most important factor  
People are revisiting holiday destinations  
25-34s most likely to have used peer-to-peer rented accommodation  
Most expect to take another UK trip in the next year

### Domestic Holidays Taken

Half of people have taken a domestic holiday in last year  
Families with young children more likely to take a domestic holiday  
Figure 20: Holidays taken in UK, July 2015

### Domestic Holiday Type

Over a quarter took a city break  
Figure 21: Type of domestic holiday taken, July 2015  
Younger people are taking shorter holidays  
Figure 22: Domestic holiday length, July 2015  
City breaks are kept short  
Figure 23: Domestic holiday length, by domestic holiday type, July 2015

### Booking

Most book independently  
Figure 24: Booking method used, July 2015  
1-3 months is most common booking time  
Figure 25: Booking time, July 2015  
Beach holidays booked further in advance  
Figure 26: Domestic holiday booking time, by domestic holiday type, July 2015

### Travel Method

Own car/motorbike preferred choice of transport  
Figure 27: Travel method used for last domestic holiday, July 2015

### Influencing Factors

Cost of accommodation is most important factor  
People care about scenery  
Millennials influenced by available activities  
Attractions particularly important to families  
Figure 28: Domestic holiday destination influencing factors, July 2015

### Domestic Holiday Behaviour

People are revisiting holiday destinations

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 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Domestic Tourism - UK - October 2015

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.

Over a quarter have taken three or more domestic holidays

More than a third use comparison websites

Figure 29: Domestic holiday behaviour, July 2015

25-34s most likely to have used peer-to-peer rented accommodation

Figure 30: Stayed in peer-to-peer rented accommodation during a domestic holiday, by age, July 2015

### Future Domestic Holidays

Most expect to take another UK trip in the next year

Figure 31: Future domestic holidays, July 2015

Half of people will visit a place they have been to before

Figure 32: Future domestic holiday behaviour, July 2015

### Attitudes towards Domestic Holidays

High interest in exploring the UK

Millennials want to stay somewhere unusual

People want more focus on tourism outside of London

Figure 33: Attitudes towards domestic holidays, July 2015

Younger people more influenced by cheap flights

Figure 34: Impact of cheap flights, any agree, by age, July 2015

### Appendix

Data sources

Abbreviations

Market forecast

Figure 35: No. of domestic holidays forecast, 2015-20

Figure 36: Forecast domestic tourism value, 2015-20

Fan chart forecast

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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