

Beach Holidays - UK - January 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.



“To stand out in an intensely price-competitive market, beach destinations need to blend the generic attractions of sun, sea and sand with local flavours and unique attractions to become more distinctive, and operators need to invest in state-of-the-art resort facilities as well as facilitating add-on experiences beyond the beach.”
 – John Worthington, Senior Analyst

This report looks at the following areas:

- How can the traditional ‘fly and flop’ holiday evolve in future?
- What is the potential for long-haul beach holidays?
- What does the future hold for all-inclusive beach holidays?

Mintel estimates the number of beach holidays abroad in 2014 at 15.0 million with a total value of around £10.7 billion (excluding transport costs). Beach holidays have been impacted by challenging trading conditions since 2008 in line with holidays abroad as a whole. However they appear to have shown more resilience than the overall market, with consumers reluctant to give up their annual dose of foreign sunshine.

At the same time this most mainstream of holidays is in danger of becoming a purely price-driven, commoditised market as the rise of online dynamic packaging threatens the traditional role of tour operators, while mass-market sun, sea, sand destinations struggle to diversify beyond a limited ‘bucket and spade’ image.

This report explores key market drivers, trends and opportunities, looks at leading operators and products and includes consumer analysis including beach holiday destinations visited, type of accommodation used, how beach holidays are booked, important factors in choosing beach holidays and attitudes. This is the first time Mintel has reported on this market

BUY THIS
REPORT NOW

VISIT:
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

DID YOU KNOW?

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

Beach Holidays - UK - January 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

Introduction

Definition

Abbreviations

Executive Summary

The market

Beach holidays have been more resilient

Market factors

Pockets of growth

Figure 1: Leading overseas destinations, total UK holiday visits (beach and other), percentage change, 2010-13

Flight to beach

Companies, brands and innovation

Commodity versus brand concepts

Making a splash

Luxury all-inclusive

Adults-only

Three new concepts from Thomas Cook

easyJet's tour operator push

Exotic beach combinations

The consumer

Spanish islands are top location

Figure 2: Beach holidays abroad in the past three years, October 2014

A third go all-inclusive

Figure 3: Type of accommodation used for last beach holiday abroad, October 2014

One in three uses OTAs/aggregators

Figure 4: Channels used for booking last beach holiday abroad*, October 2014

'Guaranteed sunshine' and 'beach quality' rated most important

Figure 5: Factors rated as 'very important' in choosing a beach holiday abroad, October 2014

'Beach-Plus' outnumbers 'Beach Bum' by two to one

Figure 6: Attitudes towards taking beach holidays abroad, October 2014

What we think

Issues and Insights

How can the traditional 'fly and flop' holiday evolve in future?

The facts

The implications

What is the potential for long-haul beach holidays?

The facts

BUY THIS
REPORT NOW

VISIT: 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

Beach Holidays - UK - January 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.

The implications

What does the future hold for all-inclusive beach holidays?

The facts

The implications

Trend Application

Trend: Minimize Me

Trend: Secret Secret

Trend: Who are the Joneses

Market Drivers

Key points

Holiday market lagging behind economic recovery

Figure 7: GfK/NOP Consumer Confidence Index, January 2012-November 2014

Figure 8: Overseas holidays, volume and expenditure*, 2008-14

Packages outperforming independent travel

Figure 9: Volume of overseas package and independent holidays, 2009-14

Revival of Spanish beach holiday

Figure 10: Top overseas beach holiday destinations, by total volume of UK holiday visits (beach and other) 2008-13

Some markets bouncing back well

Figure 11: beach holiday destinations, total UK holiday visits (beach and other), percentage change, 2010-13

Pound's rise lowering cost of travel abroad

Figure 12: Sterling exchange rate versus selected beach destination currencies, annual averages, 2009-14

Figure 13: Holiday costs, comparison of top 20 leading resorts, 2014-15

Pound's rise may also lower the value of all-inclusives

Fuel prices falling

Figure 14: Brent Crude Spot Oil Price (US\$ per barrel), January 2013-October 2014

APD reforms gather pace

Figure 15: Air Passenger Duty (APD) rates April 2012-April 2015

Who has the best bathing beaches?

Figure 16: European beaches, quality of water, ranked by percentage of rated 'excellent'.

Clean-up operation

New routes to beach

Dreaming of beaches further afield

All-inclusive issues & research

Figure 17: Average per person per night holiday spend by board type

Figure 18: Percentage of holidaymakers spending money outside the hotel by board type

Figure 19: Average number of meals taken outside hotel by board type

Who's Innovating

Key points

BUY THIS
REPORT NOW

VISIT: 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

Beach Holidays - UK - January 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.

Making a scene
Taste of the destination
Croatian beach holidays growing
Exotic beach combinations
Visualising the beach
Yurfing for singles
Adult play

Market Size

Key points
Figure 20: Overseas holiday types taken in last 12 months, December 2014

Companies and Products

Overview of supply structure
Figure 21: Top 20 UK 'package holiday' companies ranked by ATOL licensed passengers, December 2014

Tour operators and travel groups
OTAs
Airlines and accommodation providers
Others
OTAs versus tour operators
Mainstream tour operators - beach concepts/collections
TUI
First Choice Holidays
Thomson
Thomas Cook
Beach holidays for singles
Beach holidays for older travellers
'Beach combination' holidays

The Consumer – Where Beach Holidaymakers Go

Key points
Spanish islands are most popular destination
Figure 22: Beach holidays abroad in the past three years, October 2014

The beach holidaymaker
Household income and long-haul
Figure 23: Short-haul versus long-haul beach holidays abroad in the past three years, by selected demographics, October 2014

The Consumer – Where Beach Holidaymakers Stay

Key points
Beach-inclusive
Figure 24: Type of accommodation used for last beach holiday abroad, October 2014
Figure 25: Type of accommodation used for last beach holiday abroad, by short-haul versus long-haul holidaymakers, October 2014

BUY THIS
REPORT NOW

VISIT: 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

Beach Holidays - UK - January 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.

Figure 26: Use of all-inclusive accommodation for last beach holiday abroad, by destinations visited, October 2014

Board demographics

The Consumer – How Beach Holidays Are Booked

Key points

Seven in ten book online

Figure 27: Method of booking last beach holiday abroad, October 2014

Figure 28: Method of booking last beach holiday abroad, short-haul versus long-haul holidaymakers, October 2014

Even long-haul beach holidays are mostly booked online

OTAs/aggregators used for half of online bookings

Figure 29: Online sources used for booking last beach holiday abroad, October 2014

Overall OTAs/aggregators used for a third of bookings

Figure 30: Channels used for booking last beach holiday abroad*, October 2014

The Consumer – Important Factors in Choosing a Beach Holiday

Key points

Taste for 'real country' offers real scope

Figure 31: Important factors in choosing a beach holiday abroad, October 2014

Important long-haul factors

Demographics of beach factors

Importance of resort facilities

The Consumer – Beach Holiday Preferences and Attitudes

Key points

Beach Bums versus Beach-Plus

Figure 32: Attitudes towards taking beach holidays abroad, October 2014

Figure 33: Important factors (rated as 'important' or 'very important') in choosing a beach holiday, 'beach bums' versus 'beach-plus', October 2014

Demographics of Beach bums versus Beach-Plus

Figure 34: Beach Bums versus Beach-Plus, by generational group, October 2014

Beach Bums versus Beach-Plus accommodation types

Figure 35: Beach bums versus Beach-Plus, by type of accommodation, October 2014

Beach Bums versus Beach-Plus booking preferences

Figure 36: Beach Bums versus Beach-Plus, by type of online booking, October 2014

Longer beach hols versus mini-breaks

Price versus destination

Three ways to diversify standard beach holidays

Beyond the family

Women more enthusiastic

Figure 37: Selected attitudes towards taking beach holidays abroad, by gender, October 2014

Bored of the beach

Destination choice still most important

BUY THIS
REPORT NOW

VISIT: 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

Beach Holidays - UK - January 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.

Likes and dislikes

'Beach-plus' is dominant attitude

BUY THIS
REPORT NOW

VISIT: 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