

Activity and Adventure Travel - 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.



"Consumers are becoming more active on their holidays. Being outdoors in nature, getting fitter and de-stressing are the leading consumer motivations."

This report looks at the following areas:

- Mainstreaming activity and adventure travel
- Healthy lifestyle brands

Mintel's data points to significant growth prospects, with the market likely to gradually become more 'mainstream' as it continues to broaden its appeal beyond the core under-35 demographic.

**BUY THIS
REPORT NOW**

VISIT:
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

DID YOU KNOW?

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

Activity and Adventure Travel - 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

Scope of the report

Executive Summary

Activity market is large but dominated by walking

Figure 1: Participation in domestic activity holidays over the past 12 months, August 2015

Figure 2: Participation in overseas activity holidays over the past 12 months, August 2015

Large untapped potential

Figure 3: Experience in the past five years versus future interest in taking activity and adventure holidays, August 2015

Lure of the great outdoors

Figure 4: Reasons for taking activity and adventure holidays, August 2015

Demand for specialist help

Figure 5: Preferred travel arrangements for activity and adventure holidays, August 2015

Premium/budget split growing

Figure 6: Preferred level of accommodation for activity and adventure holidays, August 2015

Gastro-activity

Figure 7: Things that would help to make an activity/adventure holiday more appealing, August 2015

What we think

Issues and Insights

Mainstreaming activity and adventure travel

The facts

The implications

Healthy lifestyle brands

The facts

The implications

The Market – What You Need to Know

Window of opportunity open for overseas travel

Health of the nation: mixed messages

Large-scale participation but walking dominates

Activity seen as key way to diversify tourism

Health & safety risks rising

Market Background

Overseas holiday revival gathers steam

Figure 8: Overseas holiday market volume, value and average spend, 2009-14

Domestic market under pressure

Figure 9: Domestic holiday market volume, value and average spend, 2009-14

BUY THIS
REPORT NOW

VISIT: 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

Activity and Adventure Travel - 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.

Macroeconomic factors boost revival

Figure 10: UK average weekly earnings (excluding bonuses)* vs CPI inflation, percentage change year on year, June 2013-June 2015

Figure 11: The wellbeing index, 2009-15

The UK's activity deficit

Obesity crisis

Figure 12: Body Mass Index (BMI) categories, UK male adults, by age*, 2013

Figure 13: Body Mass Index (BMI) categories, UK female adults, by age*, 2013

Most popular exercise activities (after walking) are swimming, cycling and running

Figure 14: Participation at least once a month among adults aged 16+ in England, most popular 25 sports activities, April 2014-March 2015

Britain's running boom

Figure 15: Number of performances in organised running events tracked by runbritain, 2011-14

Membership opportunities

Figure 16: UK sports club membership among adults aged 16+ in England, April 2014-March 2015

Domestic tourists becoming more active

Figure 17: Number of domestic overnight tourism trips (all purposes) involving physical activities, 2011-14

Tourism boards recognise activity potential

Growing safety risks

Market Size and Segmentation

A third of adults have been on an activity-focused trip

Problems of definition

Scope of domestic activity market

Figure 18: Participation in domestic activity holidays over the past 12 months, August 2015

Scope of overseas activity market

Figure 19: Participation in overseas activity holidays over the past 12 months, August 2015

Snowsports

Figure 20: Snowsports holidays, volume and value, 2008/09-2014/15

Overall growth trends and prospects

Key Players – What You Need to Know

Leading adventure brands

Other key activity specialists

Greater premiumisation and flexibility of product

Family adventure, cycling and challenge expeditions all growing areas

Use of technology to enhance customer experience

Activity and Adventure Travel Brands

Overall supply structure – DIY versus specialist activity

Activity and adventure sectors

'Adventure travel' – Definitions

Key 'adventure travel' brands

BUY THIS
REPORT NOW

VISIT: 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

Activity and Adventure Travel - 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.

TUI

Other 'adventure travel' brands

Walking/cycling holiday brands

Snowsports brands

Hybrid/mixed activity brands

Other activity specialist brands

Turnover of key players

Figure 21: Turnover of selected UK activity/adventure travel brands, 2013 and 2014

Product Innovation and Trends

Technology – Selling the product

Technology – Activity tracking

Cycling continues to be a high-growth segment

Shift towards self-guided/independent style of adventure

Growing segmentation: premium versus grassroots

Family adventure seeing new product development

Call of the wild

The Consumer – What You Need to Know

Taking the next step

Cycling & expeditions likely to be among biggest growth markets

Back to nature is major driver

Big opportunity for specialists

Softly, softly

Budget versus premium camps

Physical Activity Levels

Extending daily activity into holiday activity

Figure 22: Physical activity levels, August 2015

Activity and Adventure Travel Experience

Core demographics for activity holidays

Figure 23: Past experience of activity and adventure holidays, August 2015

Figure 24: Activity and adventure travel experience in the last five years, by physical activity levels, August 2015

Potential Growth of Activity and Adventure Travel

Large scope for expansion in activity market

Figure 25: Future interest in taking activity and adventure holidays, August 2015

Figure 26: Experience in the past five years versus future interest in taking activity and adventure holidays, August 2015

Walking offers best opportunity in mature age groups

Holidays on horseback have strong female appeal

Attracting the couch potatoes

Figure 27: Future interest in taking activity and adventure holidays, by physical activity levels, August 2015

BUY THIS
REPORT NOW

VISIT: 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

Activity and Adventure Travel - 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.

Cycling/adventure expeditions offer largest growth prospects among active consumers

Figure 28: Experience in the past five years versus future interest in taking activity and adventure holidays among 'active' and 'very active' consumers, August 2015

Motivations for Activity and Adventure Travel

Activity holidays: antidote to modern lifestyles

Activity holidays: gateway to hidden secrets

Figure 29: Reasons for taking activity and adventure holidays, August 2015

Figure 30: Reasons for taking activity and adventure holidays, by gender, August 2015

Health & fitness/social motivations very strong among over-65s

Self-improvement an important driver for under-35s

Figure 31: Reasons for taking activity and adventure holidays, by age, August 2015

CSR charity challenge potential

Activity and Adventure Travel Preferences

Specialist brands much in demand...

Figure 32: Preferred travel arrangements for activity and adventure holidays, August 2015

...but brands need to work harder to attract over-35 DIYers

Figure 33: Preferred travel arrangements for activity and adventure holidays, by age, August 2015

Soft approach is key to expansion

Figure 34: Preferred physical activity levels for activity and adventure holidays, August 2015

Figure 35: Preferred physical activity levels for activity and adventure holidays, by age and gender, August 2015

Figure 36: Preferred physical activity levels, by individual activity, August 2015

Contrast and balance are also key

Figure 37: Preferred balance of physical & other holiday activities, August 2015

Premium versus budget adventure

Figure 38: Preferred level of accommodation for activity and adventure holidays, August 2015

Figure 39: Preferred level of accommodation for activity and adventure holidays, by individual activity, August 2015

Activity and Adventure Travel – Additional Selling Points

Mind/body holidays

Figure 40: Things that would help to make an activity/adventure holiday more appealing, August 2015

Gastro-activity: permission to indulge

Pick and mix appeal

Mums look for child-friendly activities

Ethical value

Practice makes perfect

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Definition

BUY THIS
REPORT NOW

VISIT: 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