

Domestic Tourism - UK - October 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The domestic holiday market is expected to perform well in 2019 as the low value of the Pound encourages more consumers to substitute an overseas holiday for a staycation. City breaks, cultural holidays, culinary holidays and spa holidays are more likely to be taken throughout the year. More itineraries around these themes could be developed to encourage holidays outside the high season.”

- Marloes de Vries, Travel Analyst

This report looks at the following areas:

- Boosting visitation across the regions
- Boosting visitation across the seasons

The volume of domestic holidays taken by British residents is expected to grow by 2.5% in 2019 as the low value of the Pound encourages more consumers to substitute an overseas holiday for a staycation. However, travellers' cautious behaviour amid Brexit uncertainties will result in softer value growth in 2019 (+0.5%).

At a time when travellers are growing cagey about their spending, London is challenged to combat its expensive image. Other parts of the country show strong growth potential, such as Scotland and Wales, but are challenged to increase awareness of what can be discovered alongside beautiful nature.

**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

Domestic Tourism - UK - October 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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
 Products covered in this Report

Executive Summary

The market

More travellers will take a staycation amid Brexit uncertainties in 2019

Figure 1: Forecast volume of domestic holidays taken by British residents, 2014-24

Staycations forecast to grow at a modest pace in the coming years

Figure 2: Forecast value* of domestic holidays taken by British residents, 2014-24

Micro-breaks can help to boost Britain's short break market

Short breaks can help to achieve seasonal spread

The Tourism Sector Deal aims to create Tourism Zones to help improve regional spread

Companies and brands

Deutsche Bahn showcases look-a-like landmarks to spark interest in domestic holidays

VisitEngland encourages young people to take staycations

Making Greater Manchester one of the leading green city regions in Europe

The consumer

Participation in domestic holidays has risen since the EU referendum

Figure 3: UK holiday taking, 2016-19

Domestic holidaymakers intend to holiday more frequently in the UK

Brits are looking to discover more places within the UK

Figure 4: Reasons for taking more UK holidays in the next 12 months, July 2019

Untapped potential for Scotland, Wales, South West and Yorkshire & Humberside

Figure 5: UK holiday destinations, visited versus considered, July 2019

Short breaks under pressure

City breaks, cultural, culinary and spa holidays are the least seasonal holiday types

Figure 6: Considered holiday types, by season, July 2019

Devon/Cornwall, Scotland and Wales strongly associated with natural beauty

Figure 7: Perceptions of UK regions and nations, July 2019

High interest in multi-centre holidays in the UK

Figure 8: Attitudes towards domestic holidays, July 2019

High potential for cheaper long-distance trains between UK cities

Figure 9: Attitudes towards flying and travelling by train in the UK, July 2019

What we think

Issues and Insights

Boosting visitation across the regions

**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

Domestic Tourism - UK - October 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

The facts

The implications

Boosting visitation across the seasons

The facts

The implications

The Market – What You Need to Know

More travellers will take a staycation amid Brexit uncertainties in 2019

Staycations forecast to grow at a modest pace in the coming years

Micro-breaks can help to boost Britain's short break market

Short breaks can help to achieve seasonal spread

The Tourism Sector Deal aims to create Tourism Zones to help improve regional spread

Market Size and Forecast

More travellers will take a staycation amid Brexit uncertainties in 2019

Figure 10: Forecast volume and value* of domestic holidays taken by British residents, 2014-24

Staycations forecast to grow at a modest pace in the coming years

Figure 11: Forecast volume of domestic holidays taken by British residents, 2014-24

Figure 12: Forecast value* of domestic holidays taken by British residents, 2014-24

Forecast methodology

Market Segmentation

Largest increase in domestic holidays to Wales in 2018

Figure 13: Holidays in Great Britain taken by British residents, by region visited, 2016-18

Surge in domestic holidays in cities/large towns in 2018

Figure 14: Holidays in Great Britain taken by British residents, by type of destination, 2016-18

Micro-breaks can help to boost Britain's short break market

Figure 15: Holidays in Great Britain taken by British residents, by duration, 2015-18

Short breaks can help to achieve seasonal spread

Figure 16: Holidays volume and nights in Great Britain taken by British residents, by quarter, 2018

Market Drivers

Domestic market will benefit from low value of the Pound

Figure 17: Pound versus euro and US Dollar, 20 May 2016-2 September 2019

Relatively good summer weather in the UK in 2019, though not as strong as 2018

Figure 18: UK mean temperature in °C, by quarter, 2013-19

The Tourism Sector Deal aims to create Tourism Zones to help improve regional spread

Growth of overseas holidays set to outpace the domestic market between 2020 and 2023

Figure 19: Domestic holiday volume versus overseas holiday volume, 2008-23

Companies and Brands – What You Need to Know

Deutsche Bahn showcases look-a-like landmarks to spark interest in domestic holidays

VisitEngland encourages young people to take staycations

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

Domestic Tourism - UK - October 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

VisitScotland supports campaign to promote water experiences
 Making Greater Manchester one of the leading green city regions in Europe
 UK Breakaways has introduced a new rail booking engine

Launch Activity and Innovation

Inspirational campaigns abroad
 Elba Island visitors get a refund if it rains for more than two hours per day
 Deutsche Bahn showcases look-a-like landmarks to spark interest in domestic holidays
 Figure 20: Deutsche Bahn 'No need to fly' campaign, June 2019
 Campaigns to boost staycations in the UK
 VisitEngland encourages young people to take staycations
 The Mayor of London aims to boost domestic visits to London
 Focus on experiences to boost domestic travel
 VisitScotland supports campaign to promote water experiences
 Glen Dye offers experience-based itineraries built around a theme
 Local campaigns encourage destinations to work on their 'green' image
 Making Greater Manchester one of the leading green city regions in Europe
 Welsh county Anglesey awarded Plastic Free Community
 Eco-friendly transport opens opportunities for travelling more sustainably
 UK Breakaways has introduced a new rail booking engine
 SeaBubbles aims to make smarter and greener use of waterways

The Consumer – What You Need to Know

Participation in domestic holidays has risen since the EU referendum
 Families particularly cautious when booking holidays amid uncertainties
 Untapped potential for Scotland, Wales, South West and Yorkshire & Humberside
 City breaks, cultural, culinary and spa holidays are the least seasonal holiday types
 Devon/Cornwall, Scotland and Wales strongly associated with natural beauty
 High potential for cheaper long-distance trains between UK cities

Domestic Holiday Taking

Participation in domestic holidays has risen since the EU referendum
 Figure 21: UK holiday taking, 2016-19

Domestic Holidaying Intentions

Domestic holidaymakers intend to holiday more frequently in the UK
 Figure 22: UK holidaying intentions, July 2018 vs July 2019
 Families particularly cautious when booking holidays amid uncertainties
 Figure 23: Household profile of those interested in taking more UK holidays, July 2018 vs July 2019
 Brits are looking to discover more places within the UK
 Figure 24: Reasons for taking more UK holidays in the next 12 months, July 2019

Domestic Holiday Destinations

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

Domestic Tourism - UK - October 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Untapped potential for Scotland, Wales, the South West and Yorkshire & Humberside

Figure 25: UK holiday destinations, visited versus considered, July 2019

Younger Brits are less interested in holidaying in regions outside of London

Figure 26: Considered UK holiday destinations, by age and presence of children in household, July 2019

Domestic Holiday Duration

Short breaks under pressure

Figure 27: UK holiday length, 2016-19

Considered Holiday Types by Season

City breaks, cultural, culinary and spa holidays are the least seasonal holiday types

Figure 28: Considered holiday types, by season, July 2019

Younger travellers show above-average interest in activity, culinary and spa holidays

Figure 29: Considered holiday types in winter, by age, July 2019

Figure 30: Considered holiday types in spring, by age, July 2019

Figure 31: Considered holiday types in summer, by age, July 2019

Figure 32: Considered holiday types in autumn, by age, July 2019

Perceptions of UK Regions and Nations

Older generations perceive London as expensive

Figure 33: Correspondence Analysis of perceptions of UK regions and nations, July 2019

Devon/Cornwall, Scotland and Wales strongly associated with natural beauty

Figure 34: Perceptions of UK regions and nations, July 2019

Figure 35: Perceptions of UK regions and nations among visitors*, July 2019

Attitudes towards Domestic Holidays and Transport

High interest in multi-centre holidays in the UK

Figure 36: Attitudes towards domestic holidays, July 2019

High potential for cheaper long-distance trains between UK cities

Figure 37: Attitudes towards flying and travelling by train in the UK, July 2019

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Correspondence analysis methodology

Appendix – Market Size and Forecast

Volume forecast for domestic holidays taken by British residents

Figure 38: Forecast volume of domestic holidays taken by British residents, 2019-24

Value forecast for domestic holidays taken by British residents

Figure 39: Forecast value* of domestic holidays taken by British residents, 2019-24

Forecast methodology

**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