

## Short-haul Holidays - UK - June 2012

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"The 43% of European holidaymakers that have never been, but would like to go to Eastern Europe/the Balkans represent a significant opportunity for operators. While this percentage is not the highest across all short-haul destinations (it is lower than that for more 'mainstream' destinations Portugal or Ireland, for example) the region's particular advantage comes in cost terms – a factor of ever increasing importance as tough economic circumstances continue to influence holidaymaking decisions, and average expenditure on overseas holidays falls."

**– Tom Rees, Senior Travel and Tourism Analyst**

### In this report we answer the key questions:

- **What will the current eurozone instability mean for short-haul holidaymakers?**
- **How can operators capitalise on the likely growth of the older, working population?**
- **What are the prospects for short-haul holidays across 2012, and into 2013?**
- **How can short-haul rail travel compete more effectively as routes/operators increase in future?**

Holidays to Europe make up the clear majority of UK residents' trips abroad. However the market was already contracting before the impact of recession, with consumers increasingly branching out into long-haul trips. In 2009 this decline accelerated as the recession hit consumer spending, and the decrease continued in 2010 as the staycation trend persisted.

However 2011 saw an end to this trend, with holidays to the region rising 2.5% year on year and a number of countries recording an increase in holidays from the UK for the first time since the downturn began. The rising cost of long-haul travel, coupled with consumers' security fears over a number of previously increasingly popular non-European destinations were key reasons, as was the fall in costs across a number of traditional short-haul favourites in the context of continuing squeeze on many consumers' budgets.

This report considers key attitudes towards short-haul holidays, and examines who are the European holidaymakers – as well as who is planning to take such a trip in future. It investigates the core market factors and innovations in the industry, looks at the likely impact of demographic changes and forecasts the market over the next five years.

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