

## Short/City Breaks - UK - September 2013

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“The advent of social reviews demands that brands react by launching innovative ventures such as those that seek to court influential social media users. Attracting influential social reviewers and offering tangible incentives for promoting or endorsing brands on social networks is set to become increasingly necessary as the social review trend gains traction.”

– Harry Segal, Research Analyst

### This report looks at the following areas:

- How have hotel comparison websites affected the short break market?
- What do BA's hand luggage-only fares mean for the short break industry?
- What is the market for a transport comparison service?
- How will Virgin Atlantic's Little Red venture shape the Scottish market?

The short break market has managed to successfully ride out the recession, and the number of trips taken in 2012 has increased from 2008. However, while the domestic segment has enjoyed growth, the overseas segment has suffered a contraction.

Brands that operate within the short break market have a range of challenges to contend with in 2014 and the tail end of 2013, but also a number of opportunities. Oil prices are poised to rise further as unrest in the Middle East spills onto the world stage, which could lead to record pump prices in the UK as well as inflating the cost of flying. Train fares in the UK have also increased above RPI, with long-distance fares increasing the most.

However, competition in the overseas market should heat up as both British Airways and Air France launch hand luggage-only fares and IAG aims to rapidly expand low-cost Spanish airline Vueling. Deutsche Bahn's entry into the cross-Channel market will also see the German operator directly compete with the Eurostar on a number of key routes.

This report examines short breaks of between one and three nights taken by UK residents and forecasts how the market will perform over the next five years. It explores the challenges and opportunities that operators will face in 2013/14 and investigates the core drivers behind changes in the market. The report also examines consumer attitudes towards short breaks and highlights key innovations in the market. This subject was last explored in Mintel's Short/City Breaks, UK – September 2012.

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