

Short and City Breaks - UK - August 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 outlook for the short break market is promising; overall, consumers are planning to take more short breaks in the next 12 months. The top three most popular overseas destinations for short breaks remain France, Spain, and the Netherlands, all of which saw growth. Holidaymakers' choice of destination is primarily influenced by the ability to relax, value for money, climate, and a 'sense of the unknown'"

This report looks at the following areas:

- What draws consumers? The sense of the unknown
- Relaxation and digital detox go hand in hand

This report examines short breaks taken by UK residents, both within the UK and overseas. For this report, the term 'short break' is taken to mean a pure leisure holiday of between one and three nights. It also forecasts how the market will perform over the next five years. It explores the challenges and opportunities that operators will face in 2014/15, investigates the core drivers behind changes in the market and highlights some key innovations. The report examines short break versus long holiday preferences, destination, type of short break, booking methods, research before and while on holiday, short break decision influences, and finally, the most appealing activities while on short-breaks.

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

Short and City Breaks - UK - August 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

Domestic market decline drives overall drop in short breaks

Figure 1: Total short break market volume forecast, 2010-20

Last short break destination

Figure 2: Last short break destination, June 2015

Consumers plan to take more short breaks in the coming year

Figure 3: Future short holidays versus future long holidays likely to be taken, June 2015

City break top-ups in the low season

Figure 4: Type of short break last taken, June 2015

Short break booking methods

Figure 5: Booking method for short holiday, June 2015

Short break decision influences

Figure 6: Influencing factors for choosing short break destination, June 2015

Relaxing in the countryside and historical tours are top draws

Figure 7: Most appealing activities while on short breaks, June 2015

Historical tours second most popular

Issues and Insights

What draws consumers? The sense of the unknown

The facts

The implications

Relaxation and digital detox go hand in hand

The facts

The implications

The Market – What You Need to Know

Overseas rise but domestic fall affects overall short breaks market

Stronger Pound can fuel short breaks

New routes for the Eurostar

High rail fares to limit domestic breaks via rail

The economy and the consumer

Booking.com challenges Airbnb

Will the UK finally scrap air passenger duty?

Proposed decision on Heathrow's third runway set for autumn

Market Size and Forecast

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

Short and City Breaks - UK - August 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 8: Total short break (1-3 nights) taken by UK residents, volume and value, 2010-20

Figure 9: Total short break market volume forecast, 2010-20

Figure 10: Total short break market value forecast, 2010-20

A boom in the overseas market depresses the domestic sector

Figure 11: Domestic short breaks taken by UK residents, 2010-20

Figure 12: Domestic short break market volume forecast, 2010-20

Figure 13: Domestic short break market value forecast, 2010-20

Overseas market enjoys strong performance

Figure 14: Overseas short breaks taken by UK residents, 2010-20

Figure 15: Overseas short break market volume forecast, 2010-20

Figure 16: Overseas short break market value forecast, 2010-20

Segment Performance

France the top destination for overseas short breaks

Figure 17: Most popular short break (1-3 nights) destinations, 2013-14

Overseas package booking grows

Figure 18: Overseas short breaks taken by UK residents, independent versus non-independent, 2010-14

Share of overseas air travel continues to rise but will face competition

Figure 19: Overseas short breaks taken by UK residents, by transport method, 2010-14

Market Drivers

Stronger pound can fuel short breaks

Figure 20: Pound versus euro, July 2008-July 2015

Figure 21: British Pound value increase/decrease against selected destination currencies, 2012-15

City costs barometer 2015

Figure 22: Post Office city costs barometer 2015

High train fares to limit domestic breaks via rail

Figure 23: UK rail fares index, 2004-15

New routes for the Eurostar

Petrol pump prices fall

Figure 24: Petrol and diesel pump price, January 2010-July 2015

The economy and the consumer

Figure 25: Consumer confidence index, October 2014 to July 2015

Promoting short breaks in spring and autumn

Figure 26: Months holidays were taken in the past 12 months, by type of holiday, October 2014

Will the UK finally scrap air passenger duty?

Proposed decision on Heathrow's third runway set for autumn

Decrease in the price of jet fuel as oil prices remain low

Figure 27: Jet fuel prices, Pound Sterling per gallon, July 2010-July 2015

Who's Innovating?

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

Short and City Breaks - UK - August 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.

Hotel Urbano allows travellers to pay in instalments
 Pillow aids Airbnb accommodation renters
 Orbitz.com taking measures to streamline bookings
 Booking.com challenges Airbnb

The Consumer – What You Need to Know

A higher proportion of younger Millennials take short breaks...
 ...but the older affluent consumers take more
 Consumers taking more short breaks in the last year
 Most consumers staying close to home
 City breaks most popular type of short breaks
 Most consumers book just accommodation
 Relaxation biggest influence on destination choice
 Value for money second biggest influence
 Consumers seek a sense of the unknown
 Nightlife not such a big draw but important for Millennials
 Most appealing activities; relaxing in the countryside
 Most appealing activities; historical tours second most popular
 Most appealing activities; art tours appeal

Short and Long Breaks Taken

Figure 28: Past short and long holidays taken in the last 12 months, June 2015

Generally more Millennials take short breaks...
 ...but the older affluent consumers take more
 Consumers taking more short breaks than longer breaks

Figure 29: Past short holidays versus past long holidays, June 2015

Future short holiday plans

Figure 30: Future short and long holidays likely to be taken in the next 12 months, June 2015

Consumers plan to take more short breaks than longer holidays

Figure 31: Future short holidays versus future long holidays likely to be taken, June 2015

Short Break Destinations

Most popular overseas short break destinations

Figure 32: Most popular overseas short break destinations, 2013 and 2014

Last short break destination

Figure 33: Last short break destination, June 2015

Types of Short Breaks

Figure 34: Type of short break, June 2015

Younger people favour city breaks

Women aged 45+ favour countryside breaks

Figure 35: Type of short break, by gender, June 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 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Short and City Breaks - UK - August 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.

Beach holidays not popular among Scottish holidaymakers

Short Break Booking Methods

Figure 36: Booking method for short holiday, June 2015

Consumers are shopping around

Research Done Before, and While on Holiday

Figure 37: Research done before holiday and while on holiday, June 2015

Location based advertising

Figure 38: Research done before leaving versus at the destination, June 2015

Geo-targeted recommendations via beacons can help travellers explore

Concerns over data privacy and spamming

Short Break Decision Influences

Figure 39: Influencing factors for choosing short break destination, June 2015

Time to switch off

Value for money

Well-off consumers just as likely to be cautious

The value of the short break

In search of 'the real thing' and the unknown

Short shopping trips

Beacon technology to help target holidaymakers

Romantic appeal

Nightlife not such a big pull for the general population

Events

Figure 40: Influencing factors for choosing short break destination, June 2015

Most Appealing Activities

Figure 41: Most appealing activities while on short breaks, June 2015

Retirees keen on relaxing in the country

Historical tours second most popular

Art tours appeal

Spa treatments

Outdoor pursuits

Food and drink activities

CHAID Analysis – Key Targets for Different Influencing Factors

Methodology

Influencing factors for choosing a destination

Figure 42: Factors/reasons influencing the choice of destination for a short break – CHAID – Tree output, June 2015

Figure 43: Factors/reasons influencing the choice of destination for a short break – CHAID – Table output, June 2015

Appendix

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

Short and City Breaks - UK - August 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.

Abbreviations

Definitions

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 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com