

Short and City Breaks - UK - July 2016

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.



“There was strong growth in the short breaks market in 2015 and the first half of 2016, especially in the overseas segment. However, following the Brexit result, further rapid growth is in doubt. Despite uncertainty, there is still an opportunity to promote domestic trips, as well as promoting cheaper European destinations for consumers wishing to escape the news of economic doom and gloom.”
- Fergal McGivney, Travel and Technology Analyst

This report looks at the following areas:

- Brexit result likely to curb outbound travel but opportunities still exist
- Solo travel for singles in the winter months

Following strong growth in both the domestic and overseas sectors, the total volume for short breaks rose by 8.6% in 2015. Over the course of 2015, wages slowly crept up and unemployment fell to around 5%, which strengthened consumer confidence, especially among the more affluent consumers. Although those on modest incomes remained cautious, pent-up demand for overseas trips was released as consumers grew tired of austerity.

It is still too early to know what the effect of the Brexit result will be. While it is unlikely that consumers will cancel their upcoming holidays, those who were planning to book trips in the autumn will likely hold off until the Pound strengthens and the UK's economic waters become less choppy.

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

Short and City Breaks - UK - July 2016

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

The market

Total short break volume trends upwards in 2015 and 2016

Figure 1: Total short break market volume forecast, 2011-21 ^

Domestic short breaks bounce back

Figure 2: Domestic short break market volume forecast, 2011-21 ^

Overseas short breaks grow but face uncertainty

Figure 3: Overseas short break market volume forecast, 2011-21 ^

The consumer

Nearly a third of consumers have taken a short break overseas

Figure 4: Short break destinations visited in the past 12 months, May 2016

City breaks dominate the short break market

Figure 5: Types of short break taken in the past 12 months, May 2016

Solo travel for singles in the winter months

Figure 6: Attitudes towards short breaks, May 2016

What we think

Issues and Insights

Brexit result likely to curb outbound travel but opportunities still exist

The facts

The implications

Solo travel for singles in the winter months

The facts

The implications

The Market – What You Need to Know

The short break market grew in 2015

Domestic growth after two consecutive years of decline

Overseas short break market grew in 2015 but uncertainty lies ahead

How will leaving the EU affect travel?

Market Size and Forecast

Short breaks grew in 2015

Figure 7: Total short breaks (1-3 nights) taken by UK residents, by volume and value, 2011-21

Figure 8: Total short break market volume forecast, 2011-21 ^

Figure 9: Total short break market value forecast, 2011-21 ^

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

Short and City Breaks - UK - July 2016

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.

Domestic short breaks bounce back

Figure 10: Domestic short breaks taken by UK residents, 2011-21 ^

Figure 11: Domestic short break market volume forecast, 2011-21 ^

Figure 12: Domestic short break market value forecast, 2011-21 ^

Overseas short breaks continued to grow but now face uncertainty

Figure 13: Overseas short breaks taken by UK residents, 2011-21

Figure 14: Overseas short break market volume forecast, 2011-21 ^

Figure 15: Overseas short break market value forecast, 2011-21 ^

Segment Performance

Brexit makes Eastern European countries more attractive

Figure 16: Top 10 countries for short breaks, 2014 versus 2015

Opportunities for travel agents to offer staggered payment options

Figure 17: Overseas short breaks taken by UK residents, independent versus non-independent, 2011-15

Air travel increases its short break market share

Figure 18: Overseas short breaks taken by UK residents, by transport method, 2011-15

New routes planned for Eurostar after a poor start to 2016

Market Drivers

Uncertainty in the wake of Brexit

The value of the Pound plummets following Brexit result

Figure 19: Value of £1 GBP versus the euro and US Dollar, 18-27 June 2016

Weak Pound could make Eastern European destinations more attractive

Figure 20: Pound versus selected currencies, 18-27 June 2016

Figure 21: Post Office City Cost Barometer 2016

Growth in rail prices smallest since 2010

Figure 22: UK rail fares index, 2004-16

Figure 23: UK rail fares index, 2004-16

Weak Pound makes oil more expensive

Figure 24: Europe Brent Sort Price FOB (Dollars per barrel), 27 June 2013-27 June 2016

Decision delayed for expanding Heathrow

Launch Activity and Innovation

New start-up Overnight allows consumers to book spontaneously

Tripsuit can help travellers meet their short break needs

99trips; offering customisable packaged deals for short breaks

Hopper predicts fares and notifies travellers of price drops

Live chat messaging apps can help deliver attractive deals

The Consumer – What You Need to Know

Proportion of consumers taking short breaks abroad has grown over the last two years

Uncertainty ahead following the Brexit result

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

Short and City Breaks - UK - July 2016

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.

Rural short breaks tend to be more popular with those already living in rural areas
Half of consumers view short breaks as an ideal time for solo travel

Short Breaks Taken

Nearly a third have taken a short break overseas

France to receive a boost with Euro 2016

Figure 25: Short break destinations visited in the past 12 months, May 2016

One in five consumers are high-frequency short breakers

Figure 26: Repertoire of countries visited for a short break, May 2016

Short Break Destination Interests

Half of consumers interested in a short break in Ireland

Figure 27: Short break destination interests, May 2016

A return to staycations?

Strong interest in Germany but new Airbnb rules could dampen appeal

Potential boost for the Netherlands with a new Eurostar route

Potential to increase short ski breaks

Countries not interested in visiting for a short break

Figure 28: Countries not interested in visiting for a short break, May 2016

Reasons For Not Taking Short Breaks

One in three opt to go on a long break instead of a short break

Figure 29: Long breaks taken by those who haven't been on a short break in the last 12 months, May 2016

Reasons for not going on a short break

Figure 30: Reasons for not going on a short break, May 2016

Short Break Types

City breaks dominate the short break market

Figure 31: Types of short break taken in the past 12 months, May 2016

Destinations and holiday types

France has potential for short family breaks

South Eastern and Welsh residents keen on short beach breaks

Combining different types of holiday into one short break

Figure 32: Future interest in types of short breaks, May 2016

Booking Habits of Short Breakers

Devices used for booking

Smartphones and beacons could help boost short breaks

Figure 33: Device used to book most recent holiday, by length and destination of holidays taken in the last 12 months, April 2016

When Short Breaks are Booked

Booking lead times for short breaks are quick

Figure 34: Booking lead time, by length and destination of holidays taken in the last 12 months, April 2016

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

Short and City Breaks - UK - July 2016

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.

Midweek breaks for seniors can make their money go further

Figure 35: Day of the week short breaks are taken, May 2016

Figure 36: Length of last short break, May 2016

Attitudes towards Short Breaks

Short breaks in the low seasons to beat the winter blues

Solo travel for singles in the winter months

Promoting short breaks in the UK to mature women

Highlighting value offered by UK breaks

Figure 37: Attitudes towards short breaks, May 2016

Figure 38: Attitudes towards short breaks, May 2016

Methodology

Promoting solo short activity breaks to beat the winter blues

Figure 39: Target groups based on attitudes towards short breaks – CHAID – Tree output, May 2016

Figure 40: Target groups based on attitudes towards short breaks – CHAID – Table output, May 2016

Appendix – Data Sources, Abbreviations, and Supporting Information

Abbreviations

Definitions

Forecast methodology

Figure 41: Best- and worst-case forecast for total short break holiday volume, 2016-21

Figure 42: Best- and worst-case forecast for total short break holiday value, 2016-21

Figure 43: Best- and worst-case forecast for domestic short break holiday volume, 2016-21

Figure 44: Best- and worst-case forecast for domestic short break holiday value, 2016-21

Figure 45: Best- and worst-case forecast for overseas short break holiday volume, 2016-21

Figure 46: Best- and worst-case forecast for overseas short break holiday value, 2016-21

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