

## Short-haul Holidays - UK - July 2013

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*"Allegations launched by the European Commission into Eurotunnel levying excessively high track access charges could see passenger ticket prices fall. Deutsche Bahn's entry into the market could also reduce cross-Channel ticket prices as both operators will be running direct services to Lille and Brussels."*

– Harry Segal, Research Analyst

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

- What are the prospects for short-haul rail travel in 2013/14?
- How can the rail segment improve the appeal of packaged products?
- How will economic recovery impact the short-haul holiday market?
- What are the prospects for emerging destinations in 2013/14?

Short-haul represents 81% of UK residents' holidays abroad by volume, but the segment has been hit hard by the recession and resultant consumer efforts to cut costs. The number of short-haul holidays taken by UK residents has fallen 21% since 2007, compared to an 18% decline in the long-haul segment.

After three years of contraction, the short-haul holiday market enjoyed a 3.7% growth in the number of trips taken in 2011 before declining 0.9% in 2012. However, the contraction in 2012 can be attributed to an artificially high growth in 2011, fuelled by consumer reactions to increasing long-haul costs and geopolitical unrest in North Africa – in reality the 2012 market was still up 2.9% against 2010.

This report examines short-haul holidays 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-haul holidays and highlights key innovations in the market. This subject was last explored in Mintel's *Short-haul Holidays – UK, June 2012*.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market