



Destination UK – focus on the South West

Driving growth in the UK hospitality and leisure sector

A word from Martin French

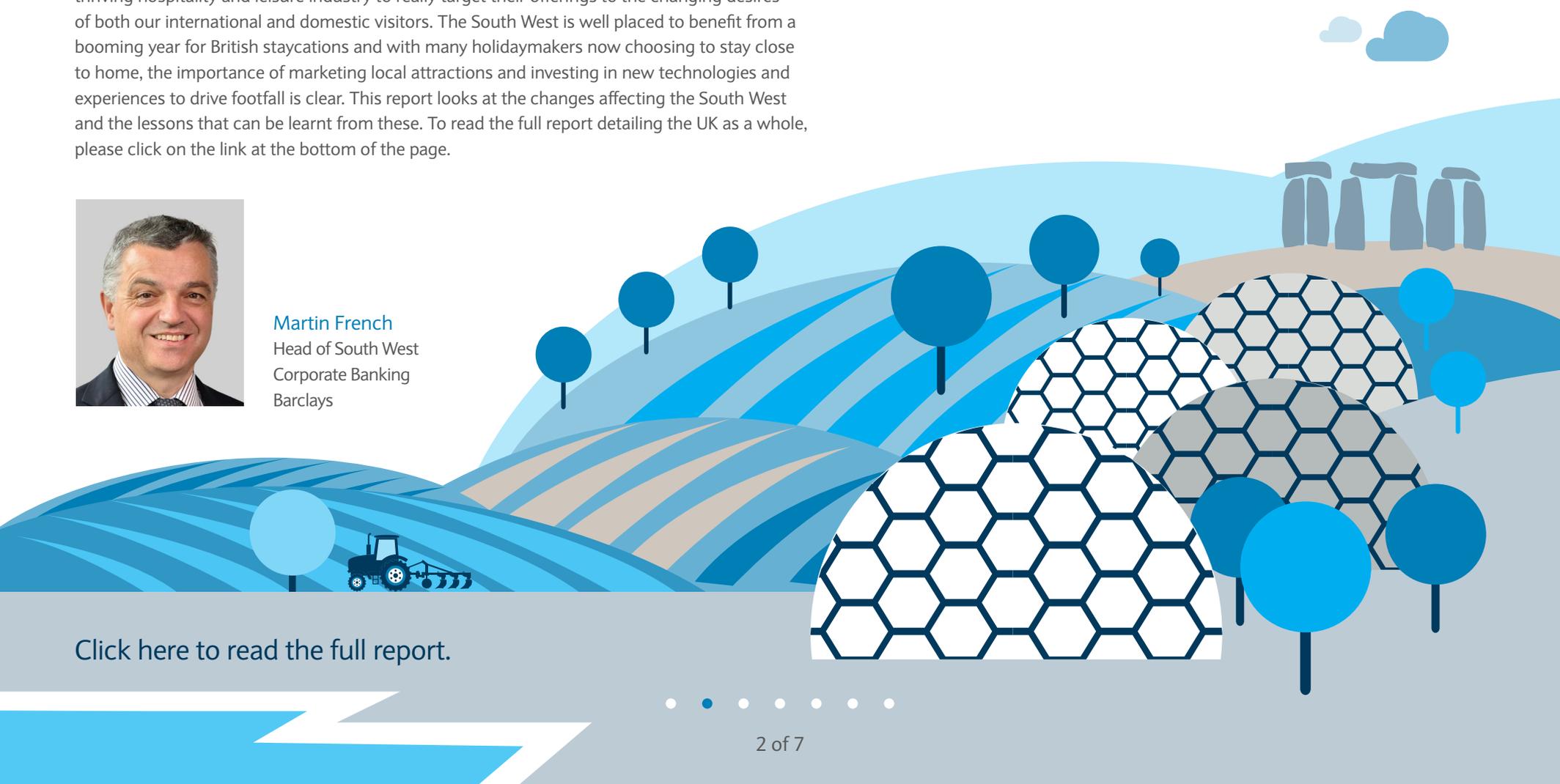
Connecting with British holidaymakers is more important than ever for hospitality and leisure providers as these are the customers who are more likely to visit again in the future.

These findings represent a fantastic opportunity for the businesses within the South West's already thriving hospitality and leisure industry to really target their offerings to the changing desires of both our international and domestic visitors. The South West is well placed to benefit from a booming year for British staycations and with many holidaymakers now choosing to stay close to home, the importance of marketing local attractions and investing in new technologies and experiences to drive footfall is clear. This report looks at the changes affecting the South West and the lessons that can be learnt from these. To read the full report detailing the UK as a whole, please click on the link at the bottom of the page.



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Focus on the South West

The future for the South West's hospitality industry is very bright, according to our recent study of holiday trends.

The South West is set for a bumper year

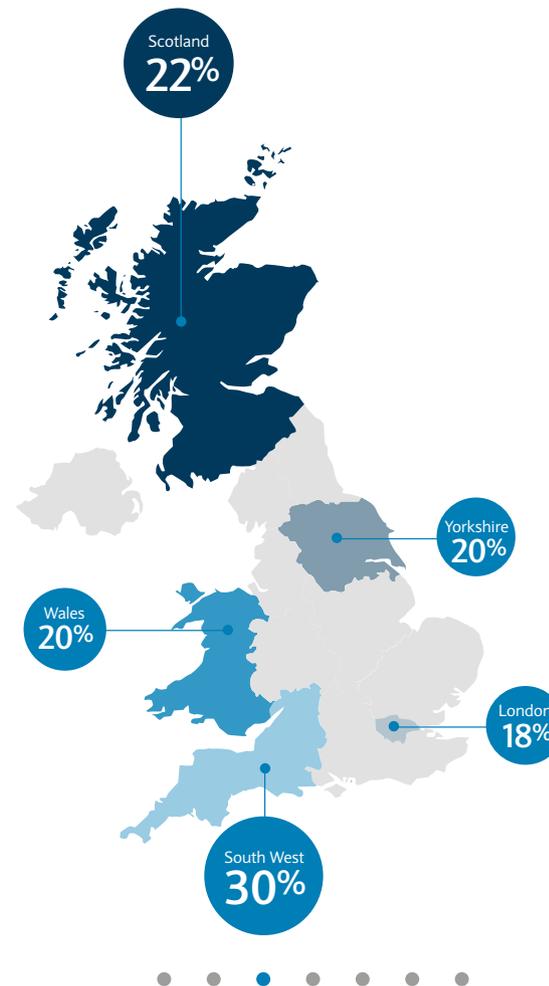
We surveyed more than 2,000 UK holidaymakers and the results showed that 35% of those taking holidays could easily go overseas but choose to remain in the UK. This is hugely positive for Britain's economy and providers, demonstrating that holidaying in the UK is chosen on the basis of quality, value and convenience. 71% of people from the South West surveyed described holidaying in the UK as 'hassle free' due to the familiarity of the food, language and travel options.

Of all UK holiday locations, the South West was the most popular destination for domestic visitors, with 30% of those surveyed stating they'd like to visit. 10% of over 7,000 international visitors we surveyed said they wanted to visit our attractions; however, there seems to be more of a focus with the Germans and Australians, with 17% wishing to visit here.

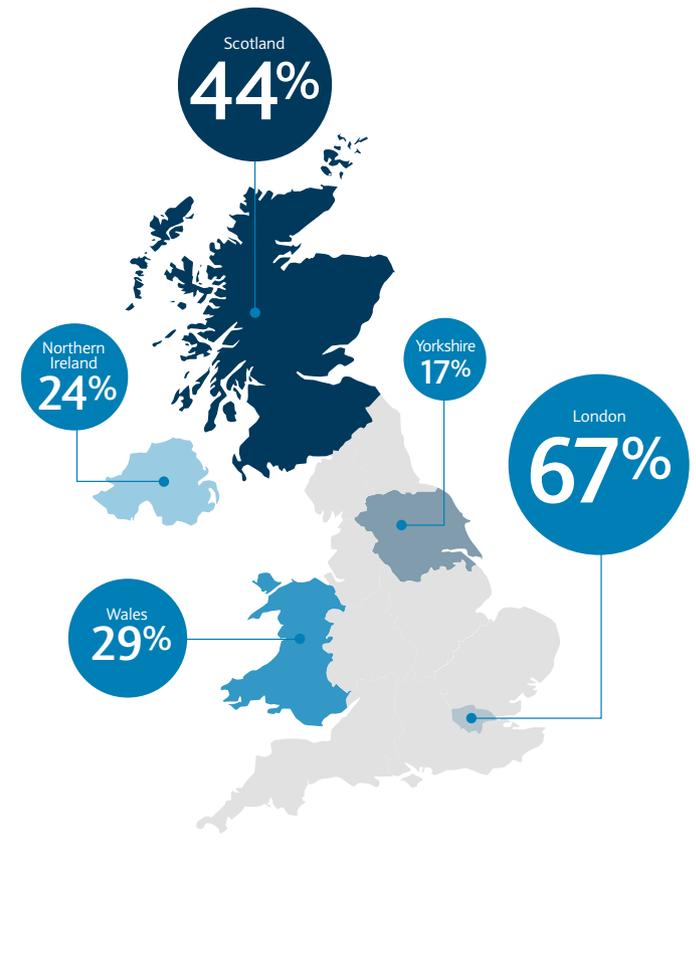
34% of holidaymakers from the South West would like to visit our cities of culture and engaging history, and 37% would go to enjoy the beautiful beaches that the UK has long been renowned for. Holidaymakers from Plymouth reflect the trend of the region with 35% looking for a city break and 41% making Cornwall their holiday destination. The extensive amount of rugged countryside that Devon has to offer draws in 16% more males to the area, 16% of them being aged between 25 and 34 compared to 15% females aged between 18 and 24.

Which regions in the UK are you planning on visiting? (Top 5)

UK visitors



International visitors



A very South West staycation

The increase in British holidaymaker's budgets for domestic trips has given rise to 30% of people spending more on leisure activities than in previous years and taking short breaks within the UK in addition to a main overseas holiday. Out of the 50% from the South West taking these second short-break holidays, 60% felt that holidays in the UK are now more affordable and better value for money.

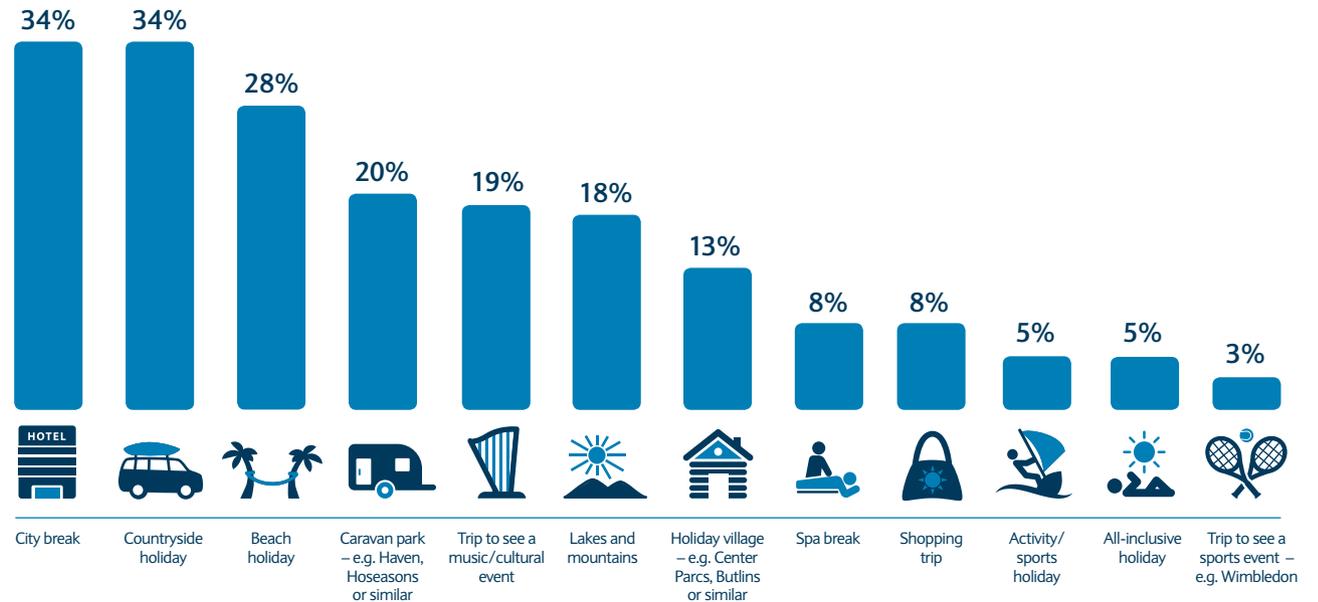
In addition to the popularity of the staycation growing over the past years, the South West also remains the prime holiday spot for those from this region, with 67% holidaying closer to home. The South East and Wales followed as the next most popular destinations for South West holidaymakers. The Cotswolds proved the most popular attraction in the South West, and were particularly popular with holidaymakers from the cities: 12% of those from Plymouth and 13% from Brighton.

Personalise and emphasise

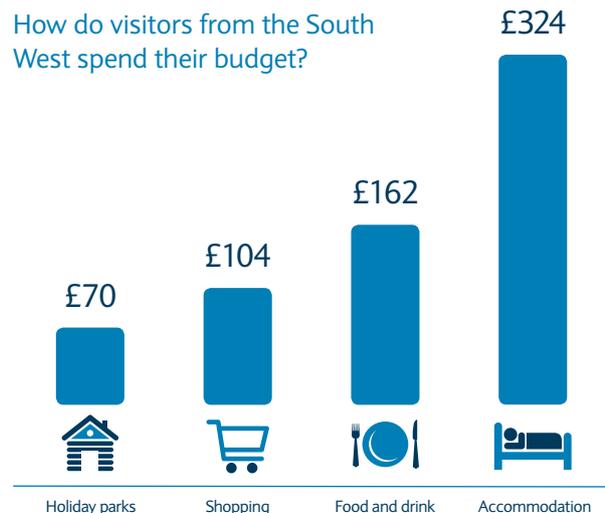
While self-catered apartments are becoming more popular with the rise of providers such as Airbnb, 31% of visitors from the South West still prefer to book self-catered accommodation. Only 6% of holidaymakers would book luxury 5 star hotels, with 49% booking their accommodation directly through the website of the accommodation provider. South West holidaymakers spend an average of £324 on hotels and accommodation, higher than the domestic visitor's average of £309 per holiday.

The results of the survey show that eating out and shopping are the areas South West holidaymakers are most likely to spend their remaining budget on. Overall we see a 20% spending increase in comparison to 2016, with 2% of people having significantly more to spend

What type of holiday are you planning in the UK this year?



How do visitors from the South West spend their budget?



on experiences than in previous years. Hotels which emphasise their food offering are more of an appealing booking to 38% of holidaymakers from the South West.

When asked about the most important motivations for taking a break in the UK, 45% of South West holidaymakers said spending time with the family was very important, while 75% saw escapism/distraction as an important driver. Taking an education/learning break was seen as quite important by 58% of visitors, although 35% thought a holiday where new skills could be experienced was not important. With personalised visits and experiences increasing in popularity, the demand from South West holidaymakers for leisure providers to offer such holidays is 22%, compared to 33% at a national level.

Strategies for success

To take advantage of increasing domestic and inbound tourism, businesses might consider the following:



Be proud of the UK

The country retains its strong attraction as a holiday destination with renowned history and culture, to both domestic and international travellers. The political turmoil has had little impact on travel to the UK. The industry should be proud of, and leverage, the country's cultural assets to attract and retain visitors.



One size doesn't fit all

Different demographic groups have diverse requirements and preferences when it comes to holidays and leisure experiences. For example, some offerings, such as mobile check-in, may only appeal to certain groups of people. Hospitality and leisure providers need to develop a range of products and services to match different expectations.



Connect locally

Our survey shows that one third (30%) of holidaymakers expect to spend more on leisure activities this year than in prior years. Shopping accounts for the third-largest proportion of spending after hotel, food and drink spend.

Leisure operators should connect with local providers and retailers to develop packages of offerings that offer wider and richer choices.



Adaptable customer experience

The rise of online and mobile booking continues apace, with over three quarters (76%) of consumers willing to book online. However, 15% of visitors still prefer to book in person or by telephone – rising to 24% of consumers over 65.

While it is obviously vital to develop user-friendly and streamlined online booking for consumers, it is important not to overlook traditional booking methods, such as face-to-face and telephone booking.



Cater for international tastes

Overseas holidaymakers can have different social and religious requirements from domestic travellers. Having services recognising these needs, such as free shuttle buses to airports, could help operators stand out from the competition. Start with simple offerings, such as free WiFi.



Act decisively on feedback

Feedback takes many forms, from face to face to online, and it has become increasingly important for businesses to understand and react to it, and promptly.

A robust strategy for tracking and responding to feedback will ultimately enhance the guest experience and help improve the possibility of repeat visits, as well as referrals and recommendations of your business to other consumers. The skill is to identify what the most appropriate type of feedback is and to then have an effective process to manage and respond to it.



Key takeaways

- The increased convenience and value for money of holidaying in the UK are driving a rise in the number of staycations for Britons, with more than one in three expecting to spend more time on holiday in the UK this year
- Short breaks are the main types of holiday for domestic visitors, with 30% planning to have their holiday in the South West, and the region remains a firm favourite destination for 67% of local holidaymakers
- The South West has a strong appeal for Australians and Germans, with 17% choosing it as one of their destinations, and 10% overall of international travellers making this one of their regions of choice
- While there is a trend for booking through providers such as Airbnb, self-catered accommodation remains the most popular hotel type that 31% of South West holidaymakers book
- 45% of South West holidaymakers said spending time with family was a very important motivation for taking a break in the UK
- Holidaymakers from the South West spend more than the average domestic visitor on accommodation, food and drink, but less on shopping and holiday parks
- South West tourism providers need to consider visitor preferences from all over the UK to encourage their appeal across the country.

Click [here](#) to read the full report or, alternatively, to find out more about how Barclays can support your business, please call 0800 015 4242* or visit [barclayscorporate.com](https://www.barclayscorporate.com)

*Calls to 0800 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply. To maintain a quality service we may monitor or record phone calls.

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About this research

The research is based on a bespoke survey of British and international holidaymakers from Opinium. The total sample size for the domestic market was 2,010 UK adults (aged 18+) who holiday in the UK. The fieldwork was undertaken between 20 February and 2 March 2017. The international survey was based on online interviews with 1,004 US adults, 1,003 German adults, 1,001 French adults, 1,003 Russian adults, 502 Saudi Arabian adults, 1,004 Australian adults, 1,004 Republic of Ireland adults and 1,002 Chinese adults (aged 18+) who have travelled internationally in the last five years. The fieldwork was undertaken from 22 February to 9 March 2017.

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