The Great British staycation
The growing attraction of the UK for domestic holidaymakers
Younger travellers lead a domestic tourism surge

This year will see the UK domestic tourism boom continue, new research by Barclays reveals. Hospitality and leisure businesses are evolving fast to cater for rising expectations and the needs of different holiday groups.

- Three in 10 domestic holidaymakers (31%) plan to spend more holiday time in this country in 2019 than they did in previous years
- More than half of 25-to-34-year-olds surveyed (52%) plan to increase their UK-based holiday time
- After convenience, the main reason is positive recent experiences of domestic holidays that people want to repeat. The latter is cited by 21% of those planning extra UK holiday time – suggesting the habit of domestic breaks is being positively reinforced
- Most hospitality and leisure businesses in every region of the UK have seen rising demand from domestic tourists, with many reporting increased revenue as a result. One in three (31%) has seen revenue rise by over 20% since 2017, whether through higher visitor numbers, providing more services to encourage greater spend, or a mixture of the two
- Perennial favourites such as the Lake District, Scotland and Cornwall remain most popular, but operators in the North East and the Midlands are seeing the biggest rise in demand
- Holidaymakers are booking their breaks earlier, a trend noted by 39% of businesses – meaning providers may need to upgrade booking systems to capitalise on this shift
- Services need to be stepped up to keep pace with rising expectations in some areas, such as the ability to select a room in advance (desirable for 68% of respondents) and to be able to take advantage of local offers (attractive to 44%).

Key takeaways
East, west – the UK is best

The UK is an endlessly appealing and absorbing place to take a holiday. That’s the verdict of the people who know it best – those who live here.

Two years after Barclays’ Destination UK report identified a surge in domestic tourism, our new findings reveal continuing growth on an undiminished scale.

**Habit-forming experiences**

Encouragingly, many people cite recent positive experiences of UK holidays as a driver to book again – suggesting that the habit of UK-based holidays is being consolidated. Not only that, but this habit is one that increasingly crosses generations.

More than half of the 25-34 age group (52%) expect to devote more of their holiday time to UK breaks than in previous years. Almost two in five of both 18-24s (38%) and 35-44s (39%) are also expanding their UK time – far greater than the numbers prioritising more overseas breaks.

Overseas holidays will always offer distinctive cultural discoveries for travellers. But, increasingly, the UK is competing on experience, value and service, while changes in weather patterns make even this a more reliable factor for those holidaying here.

*Percentages relate to the number of respondents in each age group who plan to spend more time in the UK.

**Benefits to business and beyond**

The cumulative effect of the burgeoning UK holiday habit is now feeding through to success for hospitality and leisure providers. More than half of the businesses we polled (55%) have seen an increase in demand from UK-based customers over the past two years.

That is translating into significant rises in revenue. Almost one third (31%) of the firms who report a change in demand have seen revenues soar by over 20% in the past two years. As well as reflecting the increasing visitor numbers, the rise in revenue also shows how businesses have added to their services to encourage greater spend.

That is good news not just for the industry, but for employment prospects and for the general health and vibrancy of local communities.

**Opportunities for the sector**

Our survey reveals a number of shifts in behaviour and expectations that will give operators food for thought.

One slight surprise is a clear switch towards earlier booking of holidays. This is a reversal of recent trends: if it accelerates, providers with the most flexible booking systems stand to benefit.
Meanwhile, there is unmet demand for services such as the ability to choose a specific room – for example, one with an outstanding view – at the point of booking. Our data suggests providers who have invested in digital services, such as virtual tours of facilities and activities, are seeing payback.

**How to forge lifetime loyalty**

Appealing to the evolving tastes of specific demographics unlocks further opportunities to attract customers.

Younger people may be more inclined towards holidays in the UK, but often have higher expectations. Members of the 18-24 group, for example, are much more likely to expect wi-fi and streaming services as standard in holiday accommodation. Hungry for new experiences, they are also keenest to know about local offers from other providers in their chosen area – a clear driver for operators to join forces in their marketing efforts.

Of course there is no single holiday solution for this group. For one thing, over a third (36%) of them holiday with family. Activity holidays for small groups of friends; holiday park style getaways for multigenerational groups; breaks that offer a wide range of local experiences to satisfy different family members – all have their part to play.

Regardless of holiday type, sealing the lifetime loyalty of this age group will require great holiday experiences, but also the promise of new ones next time round. Providers will win repeat business in the short term by adapting their offering constantly and by catering for as many generations as possible – today’s white-water rafters are the low-intensity hikers of tomorrow.

Offering the most accessible holidays, and highlighting this on websites and other marketing platforms, will help provide reassurance to holidaymakers directly affected, as well as encouraging their visit in the first instance. Those booking for a group that includes someone with diminished mobility, vision or hearing, or a mental health condition, will similarly be encouraged.

**Deeper understanding**

The thriving state of domestic tourism is testimony to the creativity and responsiveness of the businesses providing it. Holidaymakers now rate UK and overseas leisure experiences equally in terms of recent improvements, and most say customer service is similar at home and abroad.

By gaining a deeper understanding of motivations and trends, businesses can shape even more compelling holiday experiences for the home market – and start to embed lifetime loyalty among their customers.

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**Access for all**

For another sizeable group – those whose holiday party includes someone with a disability – more choices are opening up.

Businesses recognise the rising demand, and many have adapted their offerings to match because opportunities exist to meet the needs of this market and ensure everyone has access to a great holiday experience. This should help open up holidays to the estimated 300,000 Britons who told researchers last year they had been unable to take a recent holiday due to accessibility issues – an £83m opportunity for providers to extend the reach of their services.²

Mike Saul
Head of Hospitality and Leisure,
Barclays Corporate Banking

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**Top reasons for spending more holiday time in the UK**

- **Convenience**: 34%
- **To replicate previous holidays**: 21%
- **More affordable**: 19%
Positive news at a pivotal moment

As UK tourism businesses await a game-changing government deal, Sally Balcombe, Chief Executive of VisitBritain/VisitEngland, reflects on the current state of the sector.

Barclays’ new research delivers some heartening news about the flourishing health of UK domestic tourism.

Particularly positive, from VisitBritain’s perspective, is the finding that those 18-24 year olds who take holidays are increasing the time they devote to UK breaks. This is the first evidence of a turning-point in what we had previously identified as a negative trend.

Those now in their late teens and early 20s grew up in the age of low-cost carriers, opening up much more affordable overseas trips. Because habits are formed young, this age group largely missed out on UK-based family experiences so were not seeking to replicate them in adulthood.

That phenomenon was the impetus for VisitBritain’s microgapping campaign, which launched last autumn. It encourages more in-depth mini-holidays within the UK: immersive experiences that often have an element of learning or giving something back.

Barclays’ findings suggest that younger people are starting to respond positively to those UK breaks that appeal to their passions. A growing awareness of sustainability may also be at play here.

Make it unique
Microgapping is just one example of a truth that transcends demographics: people are seeking unique holiday experiences. All the better, too, if they offer striking visual potential that is Instagram-friendly.

Barclays’ report underlines how visitors are keen to add value through the chance to sample a range of experiences during their holiday.

A multigenerational family group may all be inspired by the idea of an outdoor holiday, while entertaining rather different images of what that involves. Businesses will prosper if they have the ability to flex their product to realise each of those holiday dreams.

Partnership is key to this kind of nuanced offering. Joining forces to create a compelling theme or itinerary can be extremely effective. This has been a cornerstone of our Discover England Fund. The result is new itineraries and bookable tourism products such as the Great West Way touring route, the fruit of business collaborations all the way from Windsor to Bristol.

Rain and shine
One of the pleasantly surprising findings of the Barclays research is that many businesses are taking earlier bookings from UK customers.
If sustained, this would be a welcome reversal of a long-term trend for last-minute bookings. It may partly reflect consumers’ desire to get ahead of the game after the rush that followed last summer’s good weather.

Weather and tourism will always be correlated. Those businesses that have been able to build in an element of weather-proofing are reaping benefits. In Cumbria, for example, I have seen several operators start to open in the winter months for the first time, thanks to the installation of spas, pools and other facilities.

This is a canny move. It combines the ability to appeal to multigenerational groups at peak times, while retaining an offer for the shoulder and off-peak seasons.

**Responsive, relevant and bookable**

What Barclays’ research underlines above all is that customers are becoming ever more discerning and demanding. Tourism is an extremely competitive industry, other countries promote heavily to British holidaymakers and we must continue to offer great experiences that make people come back time-after-time. More than a quarter of all domestic holidays are taken in July and August so boosting tourism across the shoulder seasons remains crucial, as does encouraging more of us to stay for at least one night.

Domestic day trippers in England spent £37 on average last year while spending on overnight holiday trips was £73 per night.

To succeed, businesses need to refresh their offering constantly, and provide quality experiences.

In this context ‘quality’ needn’t mean luxury, but rather responsiveness and relevance. In part, this is about providing holidays that are accessible to everyone. While there has been progress in this area, we need to ensure we are promoting holidays to this audience.

And of course, holidays and experiences need to reach customers who are immersed in the digital world and that can be difficult for a small business.

We recently announced our new ‘Tourism Exchange Great Britain’ (TXGB) platform. This is a new business-to-business digital platform that will connect British tourism suppliers to global distributors. From accommodation to attractions, transport to experiences, TXGB is a ‘one stop’ exchange for suppliers to manage availability, pricing and bookings – and for distributors to tap into a huge range of products. It’s a first for us and for many businesses across the UK. This is a pivotal moment for UK tourism. Within the next few weeks we expect the UK Government will announce details of a new deal for the sector.

Symbolically, the deal will cement tourism’s critical importance to the government’s Industrial Strategy and to the UK’s economy. More practically, it will bring fresh policy and investment support to business, with the promise of growth in skills and training to help attract both domestic and overseas visitors.

Many of the themes in this report are likely to feature prominently in the sector deal: connectivity, collaboration, accessibility in its widest possible sense. I would commend Barclays’ research to any business seeking insight on the evolving attitudes of UK tourists, and the best ways to earn their lasting loyalty.

Sally Balcombe
Chief Executive,
VisitBritain/VisitEngland
Holidaying closer to home is back in fashion – and the effects are rippling through communities and businesses across the regions.

More than half of consumers surveyed (52%) will take most or all of this year’s holidays in the UK. A fifth (21%) will holiday mostly overseas, while 28% will split their breaks fairly evenly between the UK and abroad.

People in the 25-34 and 35-44 age brackets are most likely to see the UK as the destination for their main holiday, whether or not they mix in short UK breaks too.

The biggest spenders are the 35-44 age group, who typically expect to spend £1,072 on their UK holidays. They are followed by the over-65s (£934) and the 25-34 group (£881). London-based consumers spend by far the most at £1,458, around twice as much as Scottish and South West-based holidaymakers (£723 and £729 respectively).

Accommodation typically accounts for a quarter of the holiday budget, followed by meals out (17%), leisure travel (17%) and visits to museums, galleries or historical buildings (16%).
Screen stars and very British activities
So-called screen tourism continues to boost visitor numbers in many regions, with tourists travelling to locations across the UK to experience the spectacular scenery from films and TV shows such as *Skyfall* (Glen Etive, Scotland) and the BBC’s *Poldark* (locations including the Cornish coast). Operators around Belfast and the Causeway Coast are still welcoming *Game of Thrones* fans seeking their fix now the series has concluded. And VisitScotland recently analysed the ‘Outlander effect’, showing that the benefits have spread to attractions far beyond those directly involved in the filming of the show.²

Operators are also tempting visitors with distinctively British holiday experiences. Almost a third (32%) of businesses surveyed have recently invested in activities such as cream teas, fish and chips, pub walks or visits to historic landmarks.

The most desirable destinations
City and countryside breaks are the most popular forms of holiday, each favoured by four in 10 (39%). Over a quarter (26%) of holidaymakers will head to a beach resort, while 22% will choose to visit lakes or mountains. Caravan parks, music and cultural events and holiday villages such as Center Parcs or Butlin’s are the next most popular destinations.

“Screen tourism continues to boost visitor numbers in many regions, with tourists travelling to locations across the UK to experience the spectacular scenery from films and TV shows.”
Effects on the bottom line
The tangible results of these trends are now feeding through to businesses. Of the operators that noted a change in demand from domestic tourists since 2017, one third (31%) reported increased revenue of over 20%, a striking figure. A further quarter (24%) have seen revenues rise by 11-20%, and a fifth (22%) by up to 10%. Larger businesses are the most likely to have benefited.

In line with the increased regional demand mentioned above, businesses in the North East and the Midlands are among those enjoying the biggest rises in revenue. Together with Welsh operators, firms in these regions have seen average revenue increase by almost 20%.

Jobs and communities feel the impact
Finding new employees remains an issue for the sector, despite an increase in job applicants: 44% of operators have noted a rise since June 2016, against only 16% who see fewer candidates for their vacancies.

With political uncertainty set to continue, businesses will need to continue to be creative to support their recruitment and retention: for example, by offering more flexible shifts in line with employees’ preferred working patterns.

The impact of rising tourism is felt by entire communities. Of the businesses that have seen a lift in demand, 40% note a corresponding rise in local employment opportunities, 34% have seen new hospitality businesses launch in their area, and 28% see a rise in the number of independent shops.
Getaway time is precious and eagerly anticipated. To be sure of satisfying their younger customers’ dreams, providers need insight on what exactly these generations are seeking from their holidays.

Over half of those aged 25-34 plan to spend more time on holiday in the UK this year than two years ago – but operators will need to evolve to maintain the loyalty of this group. And capturing the attention of younger adults (18-24) is a more demanding challenge still.

**Longing for escape: the 25-34s**

‘Getting away from it all’ features prominently in the holiday dreams of those in their late 20s and early 30s. Nine in 10 (91%) of those surveyed in this group cite escapism and distraction as a prime goal of their holiday time.

Perhaps because many are obliged to respond to work demands on their digital devices even when they’re away from work, people in this age group are the most likely to say they long to switch off when they get away. 70% say digital detox is a holiday objective.

This would appear to be a gap in the market: only 7% of hospitality and leisure businesses have invested in digital detox retreats in the last five years. It’s not a break likely to appeal to every demographic, however, with much smaller numbers in the older groups feeling the need to disconnect.
Also, holidaymakers will have varying definitions of digital detox – from switching off completely, to simply not having to be contactable by work. Many will be keen to continue to access shopping, sports results or local weather information. And operators who opt for such an approach will need to factor in the more powerful reach of 5G.

Clarity about the experience on offer will be important too. A ‘detox light’ approach might appeal, for example, to parents in this age group, keen to provide their children with experiences that are not tied to digital devices. This is possible in wi-fi free accommodation, such as a caravan site, where the caravan itself can be a digital-free haven, with the resort reception area offering a periodic ‘fix’ of connectivity.

People aged 25-34 are also much more likely than other demographics to expect free services that are still relatively hard to find in the UK sector, such as complimentary use of bicycles (13%), a smartphone for use while they’re out and about (11%), and even a driver (11%).

**Seeking stimulation: the 18-24s**

Almost a third (31%) of those in the 18-24 bracket are heading for active holidays in the mountains or lakes, but this group is the least likely to take a city break or book a countryside retreat.

Businesses aiming to target this age group could do well to promote stimulating breaks, as 90% want to take part in their favourite activities while on holiday. Education and interest-based holidays are important to more than two-thirds (69%) of them, while over half (52%) would like to acquire new skills during their break.
Research by VisitBritain suggests this age group is open to the concept of ‘microgapping’ – a shorter alternative to gap year travelling that encompasses similar experiences. Over half would be likely to try this kind of break within the UK, with a focus on relaxation, wellbeing and seeing iconic landmarks. A current VisitEngland campaign aims to capitalise on this, promoting short breaks to people aged 18-34.

Overall, 69% of holidaymakers surveyed now expect to find free wi-fi and streaming services when they travel – a level of demand largely matched by providers. However, among those aged 18-24, expectations are much higher at 83%. This generation sees connectivity as indispensable, and so operators who want to attract them will need to take note.

A relatively high proportion of 18-24s (64%) say they value digital detox time on holiday, similar to those figures for 25-34s. This points to the variety of hopes people nurture for their holidays, with escapism and convenience taking prominence at different times. Holiday providers need to be flexible enough to accommodate these fluctuating demands.

It’s also useful to bear in mind that younger customers may travel as part of multigenerational groups. To maximise the chance of repeat bookings, these groups need a variety of activities to suit all ages – whether within the complex itself or via other local providers. Most businesses have opportunities to link up with their peers to offer a more rounded and joined-up experience, spanning accommodation, transport, activities, food and drink.

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<thead>
<tr>
<th>Top holiday types for 2019</th>
<th>All</th>
<th>18-24</th>
<th>25-34</th>
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<tbody>
<tr>
<td>City break</td>
<td>39%</td>
<td>29%</td>
<td>35%</td>
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<tr>
<td>Countryside</td>
<td>39%</td>
<td>17%</td>
<td>30%</td>
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<tr>
<td>Beach</td>
<td>26%</td>
<td>26%</td>
<td>27%</td>
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<tr>
<td>Lakes &amp; mountains</td>
<td>22%</td>
<td>31%</td>
<td>27%</td>
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<tr>
<td>Caravan park</td>
<td>16%</td>
<td>10%</td>
<td>21%</td>
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Sealing the deal

Consumers are booking earlier and seeking reassurance about their holiday experience. How else can operators sway their decisions?

The quality of the holiday experience itself is paramount. But to earn a first booking, providers have to present an appealing offer at the research and decision-making stage. Our research suggests that this point is occurring earlier than before.

In a reversal of the long-standing fashion for last-minute booking, holidaymakers are now organising their breaks further in advance. This trend is noted by 39% of providers, against 24% who report later booking.

Travellers themselves typically estimate they will book this year’s holiday an average of two weeks earlier than last year’s. This shift may be partly motivated by holidaymakers’ awareness of rising demand and an anxiety to secure the perfect place before others do so.

Accommodation providers can respond to this need with advance marketing, perhaps using early-bird offers. Those with the technical capacity to take bookings a year in advance – or even two years, or five – will be best positioned to benefit.

What clinches a booking?
When choosing accommodation, the biggest factor for domestic travellers is value for money. This is followed by prime location, the facilities and amenities on offer, and the ability to pre-book activities of personal interest.

Key factors that prompt a booking are the quality of the operator’s website and positive online reviews, both cited by around three-quarters (74%) of holidaymakers. Over two-thirds (68%) also seek out a good third-party website with information about the local area. A previous booking or a friend’s recommendation are powerful influencers too (both 59%).

Reassurance required
However, operators could do even more to tempt people to book. For example, customers seeking accommodation now appreciate the ability to select the location of their room in advance.

Our survey suggests this function would make 48% more likely to book accommodation, and a further 20% would be much more likely to do so. However, it is a service currently offered by only 32% of relevant businesses.

<table>
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<tr>
<th>Primary motivators when booking accommodation</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Good operator website</td>
<td>74%</td>
</tr>
<tr>
<td>Online reviews</td>
<td>74%</td>
</tr>
<tr>
<td>Good location website</td>
<td>68%</td>
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<tr>
<td>Recommended by friend</td>
<td>59%</td>
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<tr>
<td>Repeat booking</td>
<td>59%</td>
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<tr>
<td>Media reviews</td>
<td>46%</td>
</tr>
<tr>
<td>Independent awards</td>
<td>41%</td>
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</table>
On this evidence, expecting holidaymakers to book ‘blind’ may no longer be acceptable. Offering them the reassurance of visualising their accommodation, its furnishings and the view they can expect – perhaps via a virtual tour – is potentially a worthwhile investment. Larger groups will also want to be sure they can be accommodated in adjacent rooms or chalets. Similarly, activity providers should consider whether they can cater for bigger groups during activities and meal breaks. Assuring customers at the point of booking that their needs can be accommodated removes stress and can be a useful driver of new business.

**Discounts and digital services**

Another key driver for booking is to assure potential customers of added value by notifying them of local offers – for example, a hotel providing discounts on treatments at a nearby spa, or activity providers joining forces to provide multi-day discounts across the group. Over half of all consumers up to the age of 45 (62% of 18-24s, 52% of 25-34s and 51% of 35-44s) said this would make them more likely to book. At present, only a fifth (20%) of accommodation providers join forces with neighbouring hospitality businesses to provide offers in this way.

Digitally enabled services would also be popular with younger audiences. Smartphone check-in, for example, is offered by 15% of accommodation owners, but would be an incentive to book for 47% of the 25-34 age group and for 43% of 18-24s.

Around half of these groups (50% of 18-24s, 47% of 25-34s) would also welcome hotels’ ability to remember their preferences, such as food choices and check-out times, from previous visits. This is another area where provision lags behind expectations (30%).

### The key to conversion?

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage of operators who provide service now</th>
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<tbody>
<tr>
<td>Free wi-fi/streaming</td>
<td>71%</td>
</tr>
<tr>
<td>Ability to select specific room before arrival</td>
<td>68%</td>
</tr>
<tr>
<td>Notifications about local offers and discounts</td>
<td>44%</td>
</tr>
<tr>
<td>Hotel remembers customer preferences</td>
<td>38%</td>
</tr>
<tr>
<td>Smartphone check-in</td>
<td>24%</td>
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</table>
The digital dividend

From virtual tours to smartphone control, many of the enhancements that would attract holidaymakers demand a commitment to new digital services. Just over a third of businesses (36%) have invested in their digital capabilities in recent years, driven by the need to keep up with competition and often in response to customer requests.

The investment is significant: an average of £314,615. But the payback is clear. The businesses that have taken this step typically report revenue hikes of over 10% as a result, with small businesses seeing an average rise of over 13%.

For operators keen to continue to stay in step with customers’ expectations, updating digital capabilities offers a powerful edge at both booking and delivery stage.

“Assuring customers at the point of booking that their needs can be accommodated removes stress and can be a useful driver of new business.”

Impact of digital investment on business revenue

- 13% 1-5% increase
- 21% 6-10% increase
- 24% 11-15% increase
- 9% 16-20% increase
- 4% 21% increase or more
Holidays for all

Operators are responding to increasing demand for accessible holidays – but there is more to do to ensure everyone can look forward to their perfect break.

For many holidaymakers, there are extra critical factors to consider when booking a holiday. Over a quarter of consumers we surveyed (28%) have a long-term disability or other condition that affects their choices; a fifth (22%) have a close family member with such a condition.

This is not solely an issue for wheelchair users and those with reduced mobility. Operators who consider the widest possible provision – for example, by training staff to cater sensitively for people with dementia and other mental health conditions, or installing clearer signage to help visually impaired visitors – can widen their potential customer base.

Access for everyone

An increasing demand for facilities and services suitable for holidaymakers with a disability is widely recognised. Almost half of hospitality and leisure businesses (49%) have noted a rise. A third of accommodation providers (33%) say they currently offer disabled facilities, and many more have plans to do so.

The picture is improving, but there is more to be done. A quarter of holiday groups (25%) affected by a disability say they find it easy to book the right accommodation. A further quarter (26%) say they can do so after some searching.

However, one in 10 still find it difficult to locate holiday accommodation with the access and facilities they need. Meanwhile 6% say it is simply impossible for them to book a suitable getaway. For these consumers, further change can’t come quickly enough.

Investing in accessibility

Ground-level facilities, flat paths/roads and the availability of grab rails are the most important features for holidaymakers surveyed in this group. A shower chair, lowered bath and wheelchair access also rank highly for those seeking accommodation. The marketing of these could be key – 88% of the demographic are likely to visit somewhere new if they can find information about it beforehand.

Of those operators with plans to widen their disabled provision, staff training, wheelchair ramps and ground-floor facilities are among the most common adaptations being undertaken. However, over a third of firms (36%) have no plans to invest in this area.

Accessibility is a real issue for a growing number of holidaymakers, and therefore for providers. Barclays’ ‘Unlock the Purple Pound’ page explores this in more detail. Building a more inclusive visitor experience is an issue of social justice, but it makes sound business sense too.

Access for all?

- 28% of consumers have a long-term disability or condition
- 22% of consumers have a close family member who has a long-term disability or condition
- 26% search around a bit, but can normally find accommodation
- 6% say it is ‘impossible’ or ‘difficult’ to find UK holiday accommodation with disabled access/facilities
- 25% say it’s easy to find UK holiday accommodation with disabled access/facilities
By embracing accessibility, a Lake District business found itself winning new customers well beyond its obvious demographic.

Time seemed to have run out for time-share developments. Wildly popular in the 1980s, these schemes seemed to have been left behind by tourism trends, with younger travellers valuing the freedom to vary their holiday locations.

Langdale Leisure in Ambleside has been able to transcend these trends, however. Owners of its 100 time-share properties bought the resort 20 years ago. The addition of luxury hotel, spa and leisure facilities has created the Lake District’s largest single-site hospitality business, and lured in a wider mix of customers that includes a high number of affluent young professionals.

Throughout these developments, Langdale wanted to continue meeting the needs of the original time-share owners, explains Nick Lancaster, Langdale’s MD.

**Access and independence**

“Our owners bought when they were in their 40s and 50s. Now two-thirds of them are over 65,” he says. “We needed to ensure we could keep them safe and allow them access, both within the properties and out on the fells.”

“The ramps we fitted to help guests who struggle on their feet or use a wheelchair are really useful for pushchairs too.”
Langdale’s focus on accessibility started with a 10-year programme for the time-shares, but was quickly extended to its other facilities. “We wanted to provide accessible facilities to hotel guests too, and we’re seeing more demand as people get to know that we will always try to manage any issues they have,” Nick adds.

“For example, the ramps we fitted to help guests who struggle on their feet or use a wheelchair are really useful for pushchairs too.”

Why box-ticking isn’t enough
Nick admits Langdale’s initial attempts at accessibility were “very much about ticking the box” and focused largely on Document M packs for accessible bathrooms.

“We very quickly realised, however, that this wasn’t doing the job properly,” he says now. “The biggest penny-drop moment for us was that disability and wheelchairs are not the same thing.”

This understanding meant Langdale’s initiative being extended to support customers with poor eyesight or hearing, and those with mental health issues. With input from the Alzheimer’s Society, Langdale teams are also trained in dementia awareness: “If somebody seems aggressive, staff appreciate there may be a reason for that and are able to support them.”

Other changes to support accessibility range from simple adjustments – such as ensuring menus are printed at a font size of at least 12 points – to the installation of a fully-accessible hotel bedroom.

From defensive to competitive
The next step will be a leisure changing area with a bench, hoist and variable-level WC and vanity unit. That aligns with poolside aids: “It’s all very well having hoists in the pool, but people also need to be able to get changed with ease and dignity,” says Nick.

“Every adjustment has a knock-on impact. For example, we introduced all-terrain mobility scooters, provided by Lake District Mobility, so that guests who struggle with walking can get out independently on the bridleways of our estate, but now we need to be sure they can also reach the leisure desk.

“We just need to ensure we are capable of looking after any guest who comes to us.”

“It’s an incremental programme: there will always be more we can do.”

Having started as a form of “defensive investing”, the focus on accessibility has added a competitive edge to the business. “We don’t do it for income-generating reasons, but everything we have done has returned on its investment,” Nick says.

Constant refreshment
Like many Lakes businesses, Langdale enjoyed a record season in 2018. By regularly updating its offering, customers can sample new experiences on every visit, helping it achieve a striking 70% repeat business statistic.

Nick also makes a point of looking for emerging new trends. “For example, we recently made the decision to swap wine suppliers so we could get the wider range of spirits that we needed for popular cocktails,” he explains.

Besides the leisure facilities it offers on site, Langdale tempts customers with discounts on other local experiences, through joint marketing with organisations such as Lakeland Arts Trust and Windermere Lake Cruises.

Using online-only promotion, the business does not target specific demographics, aiming instead to provide something for everyone through its diverse mix of facilities and awareness of accessibility. “We just need to ensure we are capable of looking after any guest who comes to us,” Nick concludes.
The National Trust provides access to some of the most beautiful and breath-taking places in the world. But despite record membership levels, the conservation charity knows it cannot afford to rest on its laurels.

The National Trust has never been more popular. In 2018, membership rose to a record high of 5.2 million people, an increase of one million in just five years. Additionally, there were 26 million individual paid-for entry visits, and an estimated 200 million free-to-access visits over the same period. That’s more people than at any time in the National Trust’s 124-year history, stresses Chief Financial Officer Peter Vermeulen.

“This surging interest and passion for the countryside, coast and historic houses we look after is overwhelmingly driven by domestic tourism – both from day trippers and staycationers, who come for a break at our camp sites, cottages, pubs and hotels,” he explains. “Amongst those who join, visit and stay with us, we’re also seeing significant growth in the number of younger people and families.”

What’s the secret?
The 248,000 hectares of land looked after by the National Trust boasts attractions including four World Heritage Sites, 778 miles of coastline, Britain’s oldest nature reserve and world class artwork and collections.

Beyond the timeless appeal of these places, there are multiple reasons why more people are spending more time both visiting and holidaying at the Trust’s sites.

“Part of our success has been down to offering a broad range of experiences and activities to suit different ages, tastes and interests,” says Peter. “We have listened to what people want from the Trust and reflected their changing needs and expectations.”

“The investment is worth it because we know we cannot afford to stand still.”

Investing in social media, websites, apps and direct emails has helped the Trust enhance its engagement with supporters, improved its understanding of what they care about and what they want to see more (or less) of, he says. It’s also opened the door to new audiences and helped changed perceptions.

Open for business
“Most of our historic houses are now open 363 days a year, opening for longer and at times of the day that better suit our supporters,” says Peter.

“As more people want to enjoy the outdoors, we’re increasing the amount we invest in facilities like cafés, cycle hire and trails,” he adds. There’s also a growing range of activities and events held at Trust properties, with regular entertainment programmes including open air cinema, theatre, music performances, book and food festivals.

Partnerships play an important role in providing this wide range of activities, stresses Peter. As the biggest host of weekly parkruns, for example, the Trust welcomed 400,000 people to its properties in 2016-7.

A place to escape
“Our founding principle of offering everyone access to green space and fresh air remains as relevant today as it was when the Trust was founded in 1895,” he states. “In the busy, noisy digital world we now live in, it’s never been so important for people to find a place to escape to.”

Perhaps it’s no surprise then that the Trust’s fastest growing visitor group is families and younger people looking to recharge and refresh in beautiful surroundings. Although they want different things from their visits than older visitors, they still value the peace, the tranquillity and that sense of freedom.
Multigenerational needs
When it comes to holidays, the Trust offers a broad range of different options to reflect its audiences and, according to Peter, demand is now high throughout the year. There’s a choice of more than 400 unique cottage and self-catering lets, from luxury-end hotels, to glamping pods, yurts and the basic, dormitory-style bothies and bunkhouses that are a big hit with millennials.

Trust sites regularly appear on hit TV shows and Hollywood blockbusters, which may have also helped boost demand among younger people. *Game of Thrones, Harry Potter and Poldark* have been filmed at Trust sites and fans flock to stay in the same places as their favourite characters.

Invest and adapt
Keeping up with demand both in terms of maintenance and the rising customer expectations is expensive, however. Last year the Trust spent £138m on conservation, including £100m on historic houses and homes.

“We also announced plans to spend an extra £20m a year on expanding, improving and upgrading facilities as well as tackling a backlog of repairs to farm buildings, homes and modernising holiday cottages.”

“But the investment is worth it because we know we cannot afford to stand still. Our mission remains the same as ever – to ensure everyone can enjoy the beauty of our places,” Peter concludes.

“Part of our success has been down to offering a broad range of experiences and activities to suit different ages, tastes and interests. We have listened to what people want and reflected their changing needs and expectations.”
Strategies for success

Hospitality and leisure operators can boost business by using insight on the evolving tastes and behaviours of holidaymakers.

Know your demographic
Target the groups you want to attract – for example, promote ‘microgapping’ experiences for younger customers, or digital detox retreats for professionals and parents. Fine-tune your offering so that multi-generational groups know they will find experiences to keep everyone absorbed.

Foster loyalty
Remarket to your customer base for short breaks or special occasions, and offer rewards for recommending a friend – still one of the most powerful influencers. Stimulate repeat business by extending and adapting your offering, so repeat customers know they can expect new experiences alongside the features they already love.

Capture early bookers
Market to the growing number of early bookers. Extend your booking system to accept business from those who want to secure their holiday a year or more in advance. Remove stress by offering customers the ability to book specific accommodation. If possible, guarantee big parties that they can be accommodated together.

Add value through collaboration
Capitalise on holidaymakers’ hunger for value. Join forces with other operators to promote a variety of local experiences. Offer discounts across different provision – accommodation, transport, tours, food and drink – to provide a more cohesive varied holiday experience.

Provide options where possible
Barclays’ research shows younger holidaymakers are more likely to favour smartphone check-in, for example, while this can be a disincentive for older age groups.

Take them behind the screen
Popular films and TV series drive tourists to their locations for many years. Look at the shows filmed in your region – and forthcoming releases – and consider how you can use them to enhance your offering. Themed rooms? Themed menus? Site tours in partnership with a tour operator?

Reap digital dividends
Consider the most eye-catching ways to raise your appeal, from virtual room tours to smartphone-controlled access.

Be accessible to all
Avoid a tick-box approach to accessibility. Look at opportunities to extend your offering from the viewpoint of people with impaired mobility, vision or hearing. Consider staff training for sensitive response to customers with mental health conditions. Ask your customers their views, and act on their feedback.
About the report

This report is primarily based on survey research commissioned by Barclays Corporate Banking.

Opinium Research conducted both consumer and business survey research on behalf of Barclays Corporate Banking in early 2019. Between 19 and 25 March, it questioned 2,006 UK adults who holiday in the UK. It also surveyed 528 manager level respondents from hospitality and leisure businesses across the UK between 21 March and 24 April 2019.

All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.
For further information and to find out how our sector specialist team can help your business respond to the issues outlined in this report, please contact Mike Saul, Head of Hospitality and Leisure. To find out more about how Barclays can support your business, please call 0800 015 4242* or visit barclayscorporate.com

Mike is head of Barclays’ UK-based Hospitality and Leisure team. With over 30 years of experience, he and his team support a wide-ranging client base with their dedicated specialist approach, industry knowledge, and sector-specific products and services.

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*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.
Additional sources

2 visitscotland.org/research-insights/about-our-visitors/interests-activities/film-tv
4 visitbritain.org/visitengland-steps-campaign-get-young-brits-take-short-breaks-home
5 euansguide.com/access-survey
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