

## Holiday Review - UK - January 2014

Report Price: £1750.00 | \$2834.04 | €2223.04

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*“Demand for financial protection against unforeseen circumstances has been a key driver behind in-store sales, so reforms that grant similar protection to dynamic online bundles will likely accelerate the shift to online. PTD reform should also see the long-term shift towards independent bookings resume.”*

– Harry Segal, Research Analyst

### This report looks at the following areas:

- How can brands leverage consumer aversion to debt?
- How will PTD reform impact the outbound holiday market?
- How will economic recovery affect the all-inclusive market?
- What can brands do to encourage early bookings?

As the UK enters a period of sustained economic recovery, the overseas holiday market is set to return to stable year-on-year growth and growth in the domestic market is set to slow significantly. The industry is entering largely uncharted waters, as the airline industry has seen the launch of aggressively priced transatlantic hand luggage-only fares, and a convergence between low-cost and full-service carriers in Europe. Reforms to the Package Travel Directive are also set to shake things up as financial protection is extended to dynamic bundles and click-through products purchased through airlines.

This report examines the holidays of UK residents, both domestic and overseas, and forecasts what the market will look like over the next five years. It explores the challenges and opportunities that operators will face in 2014 and investigates the core drivers behind changes in the market. The report also looks at booking lead times, expenditure on holidays and consumer attitudes towards paying for a holiday. This subject was last explored in Mintel's Holiday Review – UK, January 2013.

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