

Inbound Tourism - UK - November 2011

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"The aviation sector's forthcoming inclusion in the Emissions Trading Scheme (EU-ETS) presents a further opportunity for train operating companies. Mintel's exclusive consumer research consistently shows that while people often feel concern over the environmental issues around travelling, they are unwilling to pay some sort of charge as a result. So as airlines increase ticket costs to offset the EU-ETS, train operators can promote the fact that their passengers not only escape the environmental charge but do so by travelling greener anyway."

- Tom Rees, Senior Travel and Tourism Analyst

In this report we answer the key questions:

- What do aviation trends signify for the UK-inbound market?
- How important are 'non-traditional' inbound markets for the UK?
- Will the 2013/14 expansion of international rail services make a difference to inbound tourism?
- Is there potential for non-London UK holiday tours in 2012?
- Can operators outside the accommodation sector directly benefit from the Olympics?

This report looks at visits to the UK by residents of other countries. Its main focus is holidays, however it also includes some data on visits to friends and relatives (VFR) and business trips. Mintel mainly uses the International Passenger Survey (IPS) to monitor the inbound market. An adult, for the purposes of Mintel's research, is anyone aged 16 or over.

The standard travel and tourism definitions used in the terminology of this report are as follows:

- **tourism** is any travel, which involves an overnight stay away from home.
- a **holiday** can be distinguished from other leisure travel such as visits to friends and relatives (VFR) or shopping trips.
- a **long holiday** is a holiday of four nights or more away from home; a **short break** is a holiday that involves one to three nights away.
- **short-haul** refers to air holidays within Europe. **Long-haul**, therefore, refers to holidays outside Europe.
- an **inclusive tour**, or **package holiday**, is defined as the simultaneous sale of at least two elements of a holiday to the traveller. Elements, such as meals or excursions, are not essential to the definition of an inclusive tour. The term '**all-inclusive**' is used to describe a special type of resort holiday in which food, drink, excursions and other services are included.
- an **independent holiday** is one in which the traveller organises and books transport and accommodation from separate sources.
- **seat-** or **flight-only** is a type of independent holiday.

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