

## Long-haul Holidays - UK - March 2014

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“Full-service airlines will ultimately be forced to react to compete by launching their own no-frills fares, as a number have already done in the short-haul market. Such a move would allow full-service airlines to capitalise on stronger reputations and brand heritage, while retaining a foothold on the first page of comparison websites.”

– Harry Segal, Research Analyst

### This report looks at the following areas:

- How will no-frills, long-haul airfares impact the market?
- How can airlines react to shifting consumer expectations?

The long-haul holiday market contracted significantly during the recession, as the impact of squeezed household finances was exacerbated by inflated airfares due to high fuel costs and increases to the rate that Air Passenger Duty is charged at. Economic recovery in the UK provides brands with a range of opportunities for growth, but established key players will face a range of challenges, particularly from the entrance of the no-frills airline model into the transatlantic market.

Consumer demand for in-flight connectivity is set to increase, providing an opportunity for brands to differentiate by offering streaming to personal devices or a fast, stable Wi-Fi network. There is also an opportunity for airlines to cut costs and shed weight by doing away with the traditional seat-back entertainment systems.

This report examines holidays outside of Europe taken by UK residents, and explores consumer experience of and attitudes towards long-haul holidays. The report also provides a five-year volume and value forecast for the long-haul holiday market, investigates core drivers behind changes in the market and explores the challenges and opportunities that brands will face in 2014. The report also explores consumer attitudes towards flying long-haul and examines consumer demand for in-flight features. This subject was last explored in Mintel's Long-haul Holidays, UK – March 2013.

This report examines the habits and attitudes of British holidaymakers concerning long-haul holidays. Long-haul refers to all holidays outside Europe, including holidays involving cruises. A holiday must constitute at least one overnight stay. The business travel market is not reviewed in this report.

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