

## Long-haul Holidays - UK - March 2013

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“With private sector investment at Heathrow likely to see passenger charges rise and landmark rulings by the European Court of Justice in favour of passengers receiving compensation from airlines for delayed flights could push the price of air travel up, as airlines seek to recover the cost of claims through ticket price hikes.”

– Harry Segal, Research Analyst

### In this report we answer the key questions:

- How will increases in the cost of flying affect the long-haul holiday market?
- How can brands increase the attractiveness of packaged products?
- How can rewards programmes make long-haul holidays more accessible?
- How have economic conditions affected the youth backpacker market?

Ongoing weak economic conditions continue to depress the long-haul holiday market. UK residents took an estimated 6.9 million long-haul holidays in 2012, down 5% against 2011 and down 19% on five years previously. This is roughly in line with the 20% contraction experienced by the total overseas market over the last five years, but represents a weaker performance than the wider overseas market in 2012, which declined by just 1.4%.

The long-haul market has struggled to remain competitive in the post-recession economic climate. Weak economic conditions have fuelled growth in the domestic segment, and holidaymakers have also flocked to the short-haul destinations of Greece and Italy. The long-haul holiday market continues to be shaped by unrest in Egypt, as well as shifts in youth sentiment away from Australia and New Zealand and towards South America and the Far East.

This report examines long-haul holidays taken by UK residents, and forecasts what the market will look like over the next five years. It explores the challenges and opportunities that operators will face in 2013 and investigates the core drivers behind changes in the market. The report also examines consumer attitudes towards long-haul holidays. This subject was last explored in Mintel's *Long-haul Holidays – UK, March 2012*.

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