

## Package vs Independent Holidays - UK - February 2012

Report Price: £1750 / \$2837 / €1995

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“In the longer term, as countries regain popularity following unrest, tour operators are well positioned to exploit ‘new ground’ – pushing their resources and experience in destinations where infrastructure may be either recovering, or thin on the ground in the first place and thus much less suited to a self-arranged trip.”

– Tom Rees, Senior Travel and Tourism Analyst

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

- What can tour operators do to benefit from recent trends in overseas destination choice?
- How can independent holiday providers capitalise on the ‘turn to Europe’ of 2011?
- Which demographic trends offer opportunities for package and independent holiday providers, and how can they benefit?
- Will Turkey’s rise in package popularity continue?

The number of overseas holidays taken by UK consumers in 2011 was an estimated 36.4 million, unchanged from 2010 and a fifth lower than in the pre-recession period. Package holidays are estimated to have numbered 14.6 million across the year, with independent trips at 21.8 million – respectively an 18% and 21% fall from 2008.

In share terms, however, packages have managed to increase to an estimated 40% of the market, marking two consecutive years of growth. In 2011 there was a strong increase in the number of such trips taken to traditional favourite European destinations, driven by unrest across the Middle East/North Africa and resulting consumer concern. In addition, the all-inclusive model has continued to prove particularly popular.

This report examines key consumer attitudes towards both package and independent holidays, and examines which type of holiday consumers anticipate taking in future. It forecasts both markets to 2016, and looks at the challenges and opportunities operators face, especially from the above mentioned ‘turn to Europe’ and the ramifications of unrest across many (previously) popular destinations. It examines relevant demographic trends, key market factors, possible future developments and identifies targeting opportunities across the consumer base.

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