

Package vs Independent Holidays - UK - February 2013

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"In a highly volatile world, large tour operator brands have benefited from associations of security and reliability in the consumer mind, despite the recent high profile difficulties of Thomas Cook."

– John Worthington, Senior Analyst

In this report we answer the key questions:

- What are the current prospects for the family package holiday?
- What is the potential market for independent holiday booking via the travel trade?
- What are the prospects for a resurgence of package holidays to the North Africa region in 2013?
- With package holiday booking moving increasingly online what are the prospects for the high street shop?

Market conditions remain challenging for both package and independently booked holidays abroad, in the context of the UK's double-dip (and potentially triple-dip) recession. However, package holidays, far from falling into terminal decline as many predicted during the last decade, have proved relatively robust.

Much excess package capacity has been stripped away by tour operators, and the industry is likely to emerge leaner and fitter when the economy eventually picks up, especially if [Thomas Cook](#) Group is able to recover from its corporate difficulties under new management. Package holidays are valued by consumers for the security and convenience they offer. However, although products are evolving, packages are still dogged by negative perceptions of inflexibility and lack of differentiation, and British holidaymakers show an increasingly self-reliant and independent mind-set.

This report analyses market trends, consumer preferences and attitudes towards overseas package holidays versus independent travel, investigating the core market factors, key players and products in the industry, as well as supplying five-year volume and value forecasts for both package and independent holidays abroad. The report also includes a section specifically examining consumer experience of, and attitudes towards the growing segment of all-inclusive holidays.

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