

## Travel Agents - UK - December 2017

Report Price: £1995.00 | \$2648.76 | €2273.70

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“Small independent shops may struggle to compete with the leading chains when it comes to the latest technology, but with Thomas Cook and TUI focusing increasingly on selling their own bespoke holidays, this opens up an opportunity for independent shops to sell a greater diversity of products, and to proactively promote their individuality as a key point of differentiation.”

– **John Worthington, Senior Analyst**

This report looks at the following areas:

- Attracting a new generation of travel shoppers
- Specialisation: the silver shop
- Specialisation: the solo shop
- Specialisation: the ethical shop
- Destination experiences can add value to packages

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### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Specialisation: the ethical shop

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Destination experiences can add value to packages

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The implications

### The Market – What You Need to Know

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Travel shop bookings down slightly in 2017 as online shift continues  
 Shop numbers have fallen 17% since 2008  
 But 16 million shop bookings still expected by 2022  
 2017 a record year for holidays abroad, but uncertainty lies ahead  
 Spanish surge continues, but Turkey shows signs of recovery  
 Monarch collapse shows value of support in a crisis

## Market Size and Forecast

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Cook on the money  
 TUI takes 'right-brain' approach with Destination U  
 Expanding Hays launches tie-up with Smiths  
 V-Rooms are helping to shore up the strongest travel shop brand  
 Kuoni developing in-store expertise in LGBT and wellness markets  
 Barrhead introduces branded robots  
 Taking advantage of mature traveller potential.

## Market Share

Number of shops has fallen 17% since 2008  
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 Cook cutting estate, but opening more Discovery stores

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TUI launches Holiday Design Store 2.0

Hays branches out into WH Smith

Virgin expanding V-Rooms

Kuoni adds two more John Lewis concessions

Barrhead moves south of the border

Shop numbers stable at Flight Centre, Trailfinders and STA

Midcounties is now the largest chain with the 'Co-op' name

10 branded chains account for half of market supply

Jet2holidays expansion boosts supply in independent shops

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### Launch Activity and Innovation

TUI developing Destination U

Barrhead recruits robots

STA attracts publicity with flash sale

Mature approach

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Brand analysis

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Brand analysis

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### Brand analysis

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### Brand analysis

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### Brand analysis

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### Brand analysis

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Millennial events

Cook is the most widely used shop brand

Over half of most affluent group book long-haul

Shops need to diversify

Luxury expertise a clear opportunity

Mixed opinions on the value of travel shops

New technology can prove popular, but more awareness needed

## Travel Agent Usage

Seven in 10 shop researchers also book

Most 'digitally confident' consumers are also the most likely to use travel shops

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Destination experiences are an under-developed opportunity for shops

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City break opportunities

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Older Millennials likely to book a diverse range of holidays

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Older traveller opportunity

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