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Beyond Staycation

Qual Debrief
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Prepared by Trajectory

Contents

Aims and objectives

- Update on how consumers' experience of the downturn and recovery is affecting them and their holiday behaviour
- Understand how short breaks fit in to wider holiday behaviour and patterns
- Understand how consumers' priorities and perceptions of domestic short breaks vary
- Explore booking patterns and behaviours, particularly in relation to 'last minute' bookings (for the purposes of this research defined as a short break taken within one month of booking)
- Explore how promotions and deals are changing the way people plan, book and approach their short breaks
- Linking both the above objectives, to what extent are short breaks spontaneous (e.g. triggered by a promotion) or planned
- Understand how information seeking for inspiration, planning and booking differs for short breaks
- In particular, understand what role social media does (or could) play (especially on last minute trips)

Methodology

- 4 x 90 minute focus groups in 2 locations (London and Sheffield)
- Mix of ages and lifestages structured the groups (pre family, pre-school age children, school age children and empty-nesters)
- Mix of holiday behaviours in 2014 – some groups had taken trips both in England and abroad, others only in England
- Mix of booking and planning behaviours – deals, last minute
- Fieldwork conducted on 8th December 2014

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The short break context

- As the economic recovery continues, the nature of the staycation is evolving
- Our central hypothesis is that in the current and near future environment, England will remain particularly competitive in the short break market and that short breaks will be an increasing part of staycation phenomenon
- The nature of choosing and booking a short break is different to that of booking a longer holiday – in particular, research shows that short breaks are more likely to be booked at the last minute and susceptible to the influence of discounts and promotions

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Very different perspectives

- Across the four groups very different perspectives on domestic short breaks (and wider holiday behaviour) emerged depending on life stage, finances and recent holiday behaviour
- The preferences and holiday patterns of these different groups vary widely – an indication of the broad range of factors that influence holiday choice and overall satisfaction with the trips they take
- While there are significant areas of commonality, the overall picture is one of fragmented, often polarised consumer groups

Younger consumers – pent up demand and frustration with the holidays/breaks they'd been taking. Planning big for the year ahead and beyond

Families – all about breaking out of the routine and family time. Value in both home and abroad, but short breaks in England can be the best way to fill the gap.

Empty Nesters – biggest priority is to take the hassle out of holidays. Short breaks in England (often close to home) are the most convenient.

The context: recession and recovery

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What's going on?
Mixed messages on the recovery in 2014

- GDP Growing
- Inflation falling
- Employment rising

- Cost of living remains expensive
- Fragile employment – especially public sector
- Limited/no wage growth

This environment is creating a polarised attitude to the recovery, with some consumers feeling better off, but many still wary

What's going on?
Conflicting perspectives

'Everything's gone up, food, petrol, travel expenses…'

'Petrol's gone down actually…'

Two perspectives from the Family (school-age children) group, London

Both are correct – petrol is cheaper than last year, but more expensive than 2009. Individual perspectives and experiences – often linked to personal circumstances condition outlook on the recovery

Younger people struggling

‘I left uni and felt like “what do I do? Where’s the jobs at?’

‘The older you get, the more you realise how much small stuff costs.’

‘Usually I’d have a big summer holiday, but this year it didn’t happen.’

Pre-family group (aged 21-34) London

Life stage and major events – such as changing a job or buying a house – are common at this age and have a significant impact on spending ability

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Young parents also adjusting to (holiday) life with children

‘Short breaks used to be a weekend in Newcastle with the lads. Now it’s a question of researching everything on the internet to make sure there’s enough to keep the kids occupied…and looking for places that don’t take stag and hen do’s’

‘In the old days we could just go anywhere, any time of year. Now you have to be more careful (that there is something for the kids). Alton Towers weekend, Gulliver’s Kingdom, Haven, Butlins. The beach preferably. They can’t be stuck in doors, so that rules out winter. They’re a nightmare in the car.’

Young family group, Sheffield

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Young parents feeling the economic impact of taking kids on holiday in England

'You're better off going all inclusive. You know where you stand. If you take the kids on holiday here, you never know when you'll stop shelling out. You're paying out all the time.'

'I took the kids to Blackpool for three days a couple of weeks ago. It cost a fortune. I could have got a fortnight abroad for what I spent.'

Young family group, Sheffield

Domestic short breaks help older consumers avoid hassle

'I'd been going on foreign holidays every year since 1974. That was until two years ago and I just got fed up of the 'herding' in the airports. I just don't like the hassle. The queues. The delays are horrendous. I've holidayed in England ever since'

'I don't like flying – not one bit. I'm absolutely petrified. I've never liked it and I'm never going to like it. I used to tolerate it when the kids were young, because you wanted them to have holidays abroad. Now they've grown up, I'm just going to have holidays in England.'

'It was the fashion to go abroad when we were younger. It's what you did. We just got a bit bored with it. I can't sit in the sun for too long anyway. I just got bored with it. There are so many places in this country that are beautiful that I've not seen. You don't have to go abroad.'

Empty Nesters, aged 50-75, Sheffield

The (un)compromised consumer: Savvy-ness vs. Anxiety

Savvy-ness

- Able to find deals, bargains, uses offers
- Deal culture extending beyond stereotype
- ***'10 years ago, using a voucher, as a male thing, it's a bit like… "I'm not doing that". Now it's no problem. Bloody rely on them'*** – London, Family

Anxiety

- Anxious about their security and the cost of living – now and in the future
- Feel they have little room in their budgets
- ***'I know I'm not going to get a pay rise next year, so it's going to be much the same as this year'*** - London, Family

Important to remember that consumers can switch between the two categories - they are not permanently one or the other

Recessionary mindset continues

- Impact of the economic recovery is yet to filter through to most people – the minority feeling better off are so because of employment changes, rather than the cost of living coming down

- As such, recessionary trends still evident
  - Discretionary Thrift (choosing to save)
  - Mercurial Consumption (lower brand loyalty)
  - Value Hunting (avid bargain-hunting)

- Discussion of deals reveals cynicism but still a willingness to engage

- London groups mentioned chaos of the recent Black Friday sales – but still keen to reveal how 'savvy' they had been: ***'I did everything online on Black Friday – got loads of money off'***

Optimism emerging in places

'I can see the economy is getting better from my perspective. Things that weren't open to me last year are now open to me [because] employers are now willing to give you a chance… I feel like I'm in the shop more, whereas before I felt like the money wasn't really there.'

'I sell private medical insurance, which is a bit of a luxury. This year people have been buying it more and I am getting paid more. I've got a bigger budget for holidays – not this year (2014), but in the year coming up.'

Family (school-age children) group, London

Young Family group, Sheffield

Short breaks & other holidays: Patterns and preferences

The ideal year…

- For many, the ideal (but realistic) holiday year is focused on at least one big holiday (usually abroad):

  ‘This year was pretty close to ideal. We went to Mexico for two weeks. I’d like to do a big two-weeker, a lot of money going into that, somewhere exotic’ – London, Family

- Especially true of younger consumers who didn’t go abroad in 2014 – a sense of pent-up demand a need to ‘plan big’ for 2015 (if budgets allow)

- Others were keen to mention the role that short breaks (often in England) play in the ideal balance of trips:

  ‘Next year I want to go to Cyprus for two weeks and Jamaica for two weeks…I tend to balance out longer trips with spa breaks in the UK…’ London, Pre-family

  ‘I like to split up the year – especially half terms and Easter – with short breaks, which is where I go in the UK. Usually a coastal location – anywhere I can keep the kids occupied’ London, Family

Types of trip

- Social element of trips a big driver for younger consumers – festivals or weekends away with friends

  'Festivals kill two birds with one stone, because it feels like a holiday but you get the whole element of music and revelry' Pre-family, London

- Parents more likely to look for family centred destinations – places with activities to occupy the kids

- Relaxation and break from the routine more of an appeal for families than pre-family – younger consumers want activities and entertainment

  "Apart from the detachment from your life or routine, there isn't much else to do on a short break." Pre-family, London

- Countryside, coastal (including seaside) and urban destinations all mentioned as domestic trips either taken in 2014 or planned for 2015 – a sense that England has a lot to offer

Short breaks – not a 'holiday'?

This view is especially apparent amongst younger people who did not take a trip abroad in 2014 – leading to a feeling of needing to take a big trip this year, and mixed feelings about their domestic breaks

'I went on more short breaks because I didn't go on a real holiday'

'I don't really feel like I'm on holiday if I'm in England. That's probably quite shallow, but for me, if I'm going on holiday I'm getting on a plane and going somewhere hot.'

'A long hot holiday is better, but sometimes if you can't get the time off you need that weekend away'

Pre-family group (aged 21-34) London

Low expectations – a positive for short breaks?

Expectations of breaks in England are lower than abroad – primarily because they are not viewed in the same way as longer trips abroad (which may be required to fulfil high expectations to justify the amount invested in time and money.

For families where a key motivation for a short trip in England is breaking the routine and spending time together, it feeling like a break rather than a holiday is a key benefit.

'You know what you're gonna get you know the language and everything else. You just think, "this is gonna be a nice little break." You don't set your expectations too high. When you jump on a plane you expect bloody paradise.'

Family (school-age children) group, London

The weather – better than abroad?

'If you have bad weather there are things to do (in England). You can do the pictures or something. There's nothing worse than being abroad with bad weather. There's nothing to do. And you are not guaranteed good weather.'

'You just have to look at the weather forecast. You don't have to pre-book a weekend away do you?'

Empty Nesters, Sheffield

- The weather is of course hugely important – for families hoping to keep kids occupied and others who may be motivated by a good forecast to take a trip
- The variability of the English climate is very conscious – with some aware that a trip on a sunny day is remembered more positively
- Others see England as having more to do when it isn't sunny

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Contrasting perceptions of England

'Much better than it was'

- Prominent view amongst older respondents and families
- More variety on offer in terms of accommodation and activities
- A sense that the domestic offer has reached the same standard as Europe – so compares well not only to the past, but to present alternatives
- Mention of bad experiences in the past and greater accountability now – ***'I remember the B&B's being like a hell-hole… they can't get away with that anymore'***

'Not good enough'

- Most prominent in pre-family group
- No comparison with past, only with abroad, and England compares poorly to the cost and quality of European destinations
- Sense that England is more expensive, and that measures of quality are different – a 4* hotel abroad is better than a 4* hotel in England
- Feel more taken care of or pampered abroad: ***"Staff treat you like a tourist abroad"***

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England viewed positively overall

Even amongst those who thought it compared negatively to destinations abroad, England was generally viewed positively – with the variety of destinations and the ability to 'discover' new places seen as a benefit of domestic breaks

'England is interesting as well [as being easy]. Interesting places, good exhibitions…you get to see places that have a bit of culture about them. If you go to Bath or Liverpool or Newcastle you see how that city is different to your city.'

Pre-family group, London

'There's so many parts [of England] that I haven't been to, and so many parts to explore…'

Older family group, London

Familiarity with England – a double edged sword

Familiarity
(dominant, although still a sense that England can be 'discovered')

Detractor	**Driver**
Desire for variety – new cultures, languages	Close – easy to travel/get around
Low level of excitement – can be boring	Low risk (corollary of low expectations)
Frustration with being 'stuck' in England	Easy – to book and go, no hassle (airports, languages, currency etc)
	Nostalgia – revisiting places from childhood

Familiarity shifts with age, from detractor to driver

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Key differences: long and short/domestic and abroad

- An underlying need exists for both foreign and domestic trips, and consumers attempt to strike a balance between them – not enough trips abroad (long or short) leads to pent up demand and a frustration with the holidays they have taken

- Expectations are lower for domestic short breaks – fitting in with one of their primary purposes, which is to take a break from the routine

- But perceptions of quality differ – while younger consumers only compare breaks in England with abroad (and find they compare poorly) older consumers consider the change over time, and see the quality of tourism in England improving

- Short breaks in England are naturally more ‘familiar’ than trips abroad – there are positives and negatives to this, with the balance shifting with age and life stage

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The Journey: Planning, research & booking

Considerations of a domestic short break

The following factors all contribute to a short break being taken

- **Need –** wanting to go away
- **Ability** – able to go away (time/cost)
- **Trip specific trigger** – includes specific location/activity and deal

While the need to go away exists first, the trigger or inspiration can come next – consumers are willing to 'make a trip work' with sufficient inspiration

Possible short break consumer journey

The 'need' to take a short break → The ability to take it (time/finances) → Specific trigger (deal, advert, recommendation)

Short breaks – the need to take a break

Fundamental need for short breaks exists:

- Filling the gap between longer holidays
- Breaking from the routine/relaxing
- Spending time with family (or with friends)
- Avoiding hassle of going abroad

'A break is better quality time, because you're all together (as a family).'

Family group, London

'It's so painful to wait for two weeks in the summer…'

Family group, London

'I'd rather have more holidays for less money and less hassle.'

Empty Nesters, Sheffield

Short breaks – being able to take one in England

Breaks in England are facilitated by:

- Ease - of booking, travel, language etc
- Convenience – close to home, last minute
- Fitting in with a particular time/weekend
- Feel less ‘guilty’ than taking one abroad – caring or work responsibilities (and the ability to get back if needed)
- Cost – being able to afford a trip

While the desire to take a short break is fundamental, the next layer is being able to go – a stage hugely dependent on affordability and time

Breaking out of the day to day routine means fitting in to a holiday/break routine

'I'm [thinking about] school breaks, so at the moment I'm thinking of February half term and even between Christmas and New Year – just a hotel that's really close that the kids love.'

Family (school-age children) group, London

'I'm thinking about mid-January, because my daughter's got an inset day on the 16th, and I want to make the most of it…'

Family (school-age children) group, London

For parents especially, the need to fit any trips into a routine is paramount. But even for others there's a need to make a short break fit in with the time they have available, and a strong sense that having that availability is one of the first steps in thinking of a trip

Short breaks – Inspiration for a particular trip

Appeal of a specific place or type of trip

- Family connection – used to go there, nostalgia
- Always wanted to go – some people have conscious or subconscious ‘lists’ of places they’d like to see
- Recommendation – directly and indirectly (i.e. from social media)
- Advertising
- Newspaper supplements and reports

Deal, offer or discount

- Strong motivator for some
- Type of discount very important – but despite cynicism offers appeal
- Often combine with existing plans – free weekend etc.
- Some examples of a deal being the main trigger for a trip

Opportunity exists– ‘fitting it in’

- Time off work – free weekends
- Families thinking about school holidays
- Cost and being able to afford the trip
- Weather – crucial for last minute trips

The domestic short break journey - summary

Need	• Filling the gap and breaking from routine • Spending time with immediate or extended family/friends • Avoiding hassle of going abroad
Ability	• Fitting a break in with work, school, caring responsibilities • Being able to afford to go • Convenience – ease of finding & booking the right trip
Trigger	• Deals or offers • Long standing desire to visit place/do type of trip • Advertising/media supplements • Recommendations from friends/family • Opportunity exists (weather, inset day etc)

Planning and booking – no single consumer experience

In the summer a good weather forecast for the weekend is a key trigger for pre-school families, who will decide on the Thursday to head off after work on Friday (to a familiar destination), while others want more time (if only a couple of weeks) to plan any trip

'If you get a couple of sunny weeks, it gets you in the mood. You think 'right if its going to be nice next weekend, we'll jump in the car'. We'll get a cancellation, cheap caravan, cheap B&B. Obviously, you go through the process of thinking ; 'can we afford it?'. If we can, we go online and book something.'

'Its cheaper if you leave it to the last minute. We go on 'Late Rooms' and places like that. You don't need to book in advance any more.'

Young family group, Sheffield

'I wouldn't plan and book at the same time – I like to think on things.'

Older family group, London

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Planning domestic short breaks: 3 broad methods

Impulse	Considered	Routine
Likely to be a return visit to a well known destination	Usually somewhere new – ambition to visit	Family tradition, annual event
Involvement of deals, often last minute	Longer lead time, more planning and research	Likely to be the same place, same group – perhaps even the same accommodation
Likely family or immediate group of friends	Could be event-related (i.e. festivals) or more diverse groups	

Spontaneous trips

- “Just Google ‘Cheap hotels in xxxx’”
- Prompted by emails from companies they have booked with before (advertising deals for the coming week/weekend)
- Less risk, less research (for some) – others more considered and would always do the due diligence

‘If I were booking a long holiday, I would really look into it. Do lots of research. Look at customer reviews, all that – especially for a fortnight abroad. But for a short break it doesn’t matter that much.’

Young family group, Sheffield

Planning a short break – research and information

Nature of information sought can depend greatly on type of trip

If the place is pre chosen – main research will be best accommodation, things to do
If it is all about the accommodation (e.g. Spa /Camping) – research will be about best place/price

- For some trips research was unnecessary – usual routine ones going back to the same place
- But trips anywhere new necessitated an information search (for accommodation, travel, things to do – depending on priorities)
- Role of reviews (esp. Tripadvisor) very strong for younger consumers

"First step was Tripadvisor – I knew I wanted to go to the Lake District - looked at the top three and booked whichever one I could afford…I knew it would be good because it had good reviews on Tripadvisor – and I really trust Tripadvisor'

Pre-family group, London

Domestic short breaks can mean less research is needed

This can be the case for both impulse and routine breaks

Impulsive breaks might be catalysed by a single trigger – such as a good weather forecast or a deal. The spontaneous nature of the trip means there is less planning, and consequently less research for information

Routine breaks also require less planning, because the same destination or accommodation is used each time

More generally, domestic breaks require less planning because they are less hassle – no need to familiarise with complicated journeys, airports, foreign currency, language

'[A short break in England] is so easy, you just throw a few things in the car and you're off. Before we had kids we didn't even worry about booking anywhere. We would just find somewhere to stay when we arrived.'

Young family group, Sheffield

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Social media importance

Social media is important – but often acts as a subconscious influencer

Word of mouth and personal recommendations from friends are acknowledged as influential triggers to take a short break (particularly those in the ‘considered’ category).

Social media is highly relevant here as word of mouth increasingly moves online – although few respondents saw these suggestions as coming via social media

Younger London respondents aware of its impact – could remember seeing photos & experiences of friends’ trips

This group were generally most interested in trips abroad, so networks like Facebook and Instagram could be a powerful reminder of England’s offer

‘If it’s in England, Facebook photos [are an inspiration]. If someone puts a photo up, and I think “”that looks nice” I add onto my list of places to go

Pre-family group, London

Deals and offers

Deals and offers: cynicism

- While consumers continue to take deals, some cynicism is emerging about their real value
- During the downturn consumers started to question value – which was a catalyst for deal-hunting behaviour
- But now they are questioning the value of deals – and are suspicious of offers that offer 'too good to be true' discounts or inflated prices (but many take them anyway)

'If they can do it at that cheap price now why can't they average it out across the year?'

Empty Nester, Sheffield

'You're telling me it's worth £500 but I can have it for £130. Why?'

Pre-family group, London

'If you see something that's half price – why is it half price? It's at an inflated price anyway. But if I see a deal, I jump to it'

Pre-family group, London

Deals for everyday life, not holidays and breaks?

Younger consumers most cynical of deals and some would avoid them completely – a sense that a holiday (including a short break) is too valuable to risk. But many would use them in other spending categories

‘The reason they’re on offer is because they’re crap.’

‘You’re investing so much, and it’s a big deal. You want to get away, you want to relax and unwind, and you don’t want to get shafted for it. It starts everything off on a negative.’

Pre-family group, London

Deals and offers: making a trip happen

- If it's a 'big' saving e.g. two nights for the price of one
- Most positively viewed deals were about adding value – extra nights/meals etc – rather than discounts
- Despite the cynicism, many still expect deals – and not finding one can prevent a trip or affect enjoyment

'We went to Butlins because they were offering 50% off and the kids eat for free. It was cheaper than staying at home!'

Young family group, Sheffield

'I feel ripped off if I pay full price – because I know a deal was out there somewhere'

Pre-family group, London

Deals and offers: influencing destination and/or accommodation

Deals are a part of many trips – but consumers recognise the need to be flexible to take advantage of one

'Deals do influence you. We're all working on a budget. If you see a good deal for a hotel, you might change your plans a bit. It leaves you with more spending money. If you can get a £300 holiday for £200, you'll take it'

Young family group, Sheffield

'If I'm specifically looking for a deal, I never find it. I just hope I stumble across something. If you have an exact place in mind, it's not the best thing. If you can be flexible then hopefully something will come your way'

Older family group, London

Deals and offers – hunting vs. receiving

'[Initially saw a spa hotel for over £100] kept looking, found it on superbreaks for £65 per night, including breakfast – fantastic.'

Pre-family group, London

'I have so many apps on my phone - vouchercode, vouchercloud, living social.'

Older family group, London

'I tend to wait until I get an email about a deal (before booking a short break). We use Hoseasons a lot. So I wait to hear from them. They do some really good deals. I would not have paid full price.'

Empty Nesters, Sheffield

Younger & more proactive → Older & more passive

Age

Conclusions

Key findings (1)

- **There is no one consumer experience of the recovery or downturn**, instead there is wide variation and polarisation. While a handful are feeling more optimistic about the future, the majority remain wary and anxious about the validity of the recovery and the impact it will have on them.

- **Wider factors also have a significant impact on experiences of the recovery**. Some (including those on low incomes) do not feel their circumstances were changed by the downturn at all – for others, life events – having kids, caring responsibilities , dog ownership! - is the most important factor

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Key findings (2)

- **Holidays are not considered to be a zero-sum game by consumers –i.e that a holiday in England necessarily replaces one abroad** their priority (whatever the preference for holiday type or destination) is to get as much as they can

- **Flexibility is key to short breaks – both in how they are booked and how they fit into the consumer's life**. This a key difference between long and short trips – someone might organise their year around a long break, but then try and fit short breaks into their existing routine

- **The currency of deals and discounts is changing**. The recession catalysed scrutiny of value, and this has developed into scrutiny of the value of deals. Nevertheless – motivated by both a need and a desire to save – deal-hunting behaviour continues

- **Social media plays a minor role in conscious decision making**. It is not consciously considered a trigger by consumers in the same way that adverts or offers are, but is still capable of introducing the idea of a destination or holiday type to a consumer

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Key findings (3)

- **Very different priorities for holidays and short breaks exist.** While many value a mix of long holidays (often abroad) and shorter breaks (often in England/UK) some – generally empty nesters – do not see the appeal of going abroad and see domestic trips as the best way to have a break without the hassle

- **For younger groups, including families, short breaks meet a fundamental need to get away**, and the holidays they take are influenced heavily by what they are able to do (in terms of both price and time available)

- **Multiple consumer journeys exist when planning and booking a break**. For any trip to happen, the need (wanting a break) and ability (time/money) to go away must exist – the specific trip could be inspired by a number of triggers

How can VE influence these trips to happen?

This depends heavily on the type of trip being taken – spontaneous, considered or routine

- **Spontaneous** – by virtue of the spontaneity, these trips have the greatest scope for influence, as they can be motivated by a particular time or offer

  VE should respond to specific triggers – bank holidays, inset days, weather forecasts etc using targeted communications – on this evidence email may be better than social media, but that may come in the near future

- **Considered** – these trips are often motivated by a desire to visit a particular destination or type of trip, with the gap between planning and booking is much greater

  VE needs to encourage both the desire to go ('10 great things about York') and help facilitate the trip when it is booked ('York only 1 hour away and £10 by train') – first is more about 'brand building' and latter more targeted comms

- **Routine** – little planning and research

  Very limited opportunities for VE to encourage these trips specifically

  By their very nature they are established 'traditions'


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Thank You