

The Staycation: - 2011 and beyond

Autumn 2011

Undertaken for Visit England by



Our Research Aims

To provide a clear indication of what happened to the uplift in domestic travel seen in 2009 and 2010...**THE STAYCATION**

-What did/will people do in 2011?

-How was the 2011 England experience?

-What will happen in 2012 and beyond?

-and will the London Olympics impact on this?

The Approach

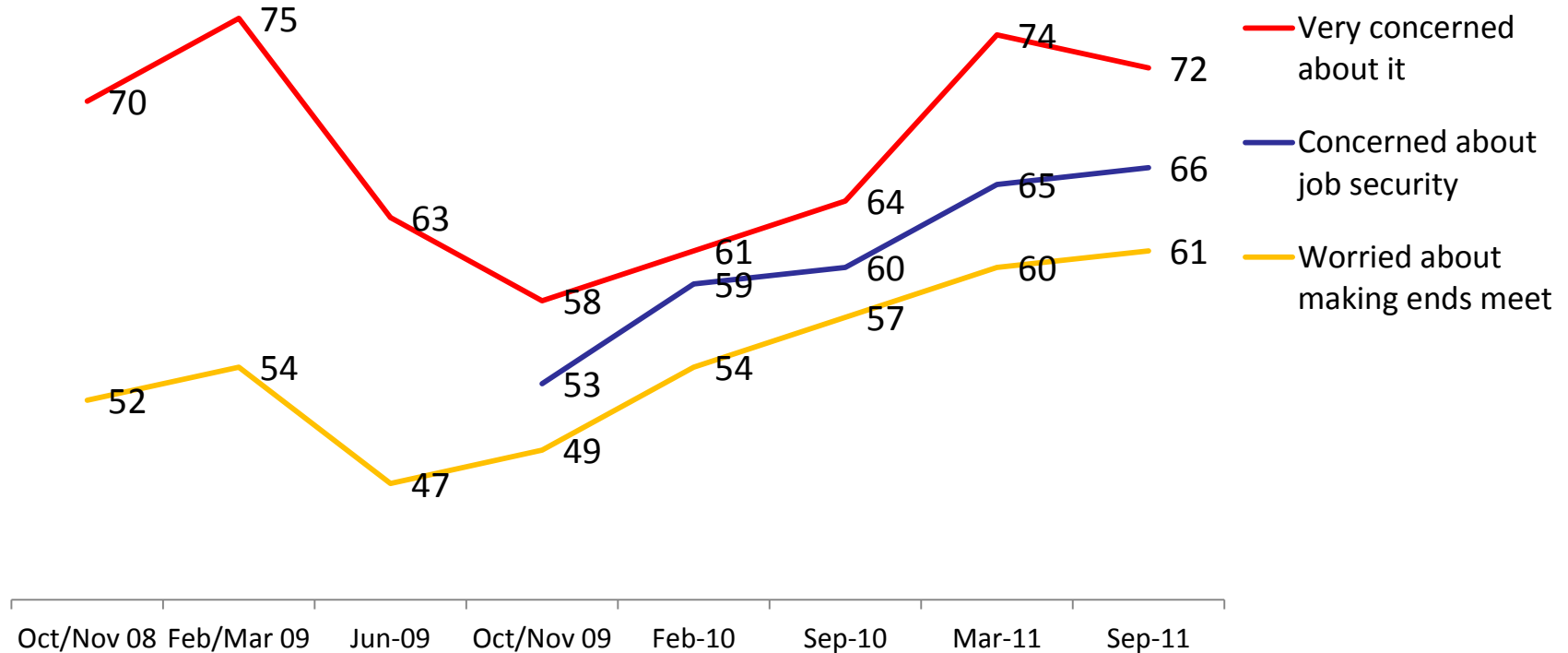
- **1000+ quantitative online interviews**
 - **15 – 20 September 2011**
 - **20 minute questionnaire**
 - **GB population (18yrs +)**
- **Included key questions on impact of & attitudes towards economic downturn tracked quarterly since Oct 08**

THE IN-GOING CLIMATE

*Ongoing impact of, & attitudes to the
Economic Downturn*

High levels of concern over economy & its impact largely unchanged over 2011

% 'Strongly agree'/'Slightly agree' with each statement

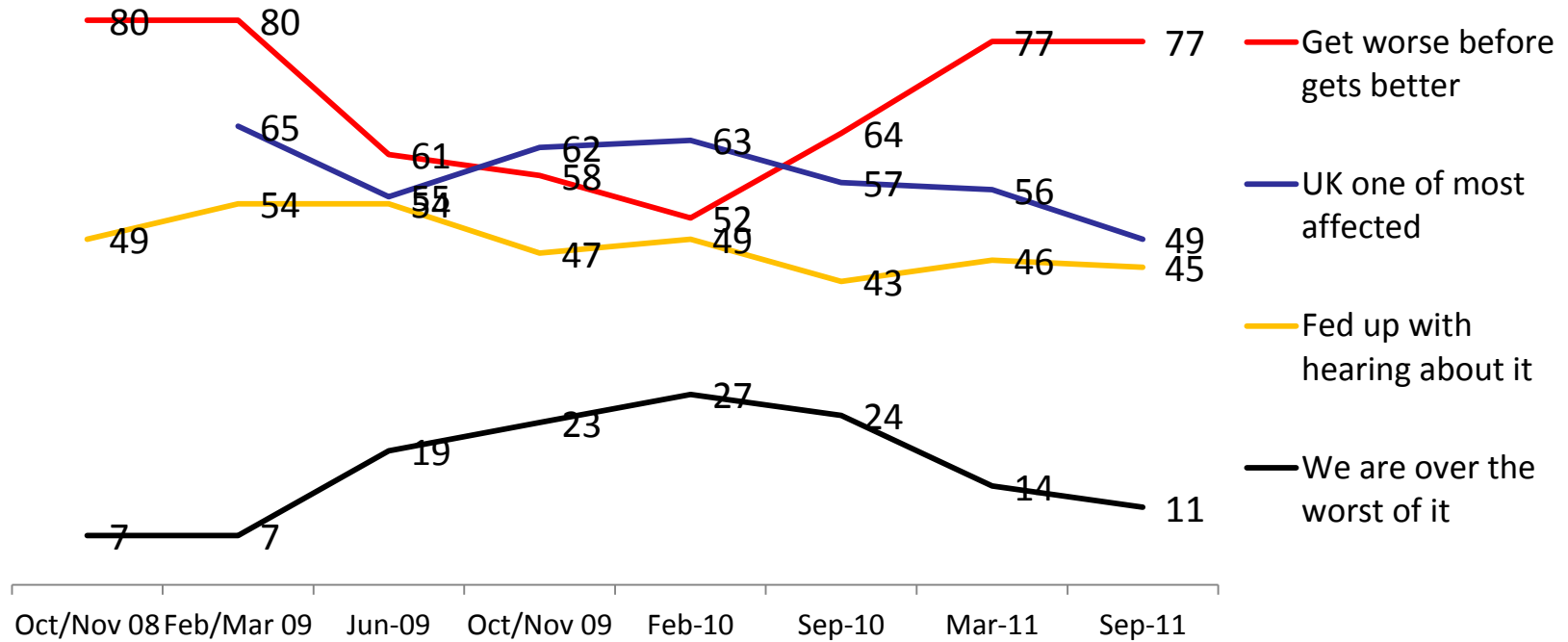


Q1. To what extent do you personally agree or disagree with the following statements about the economic downturn or credit crunch? Base: All respondents (1000+) Differences of c 5% are significant)

Over 3/4 continue to feel the economic situation will get worse before it gets better

- though fewer now feel the UK is one of the worst affected countries

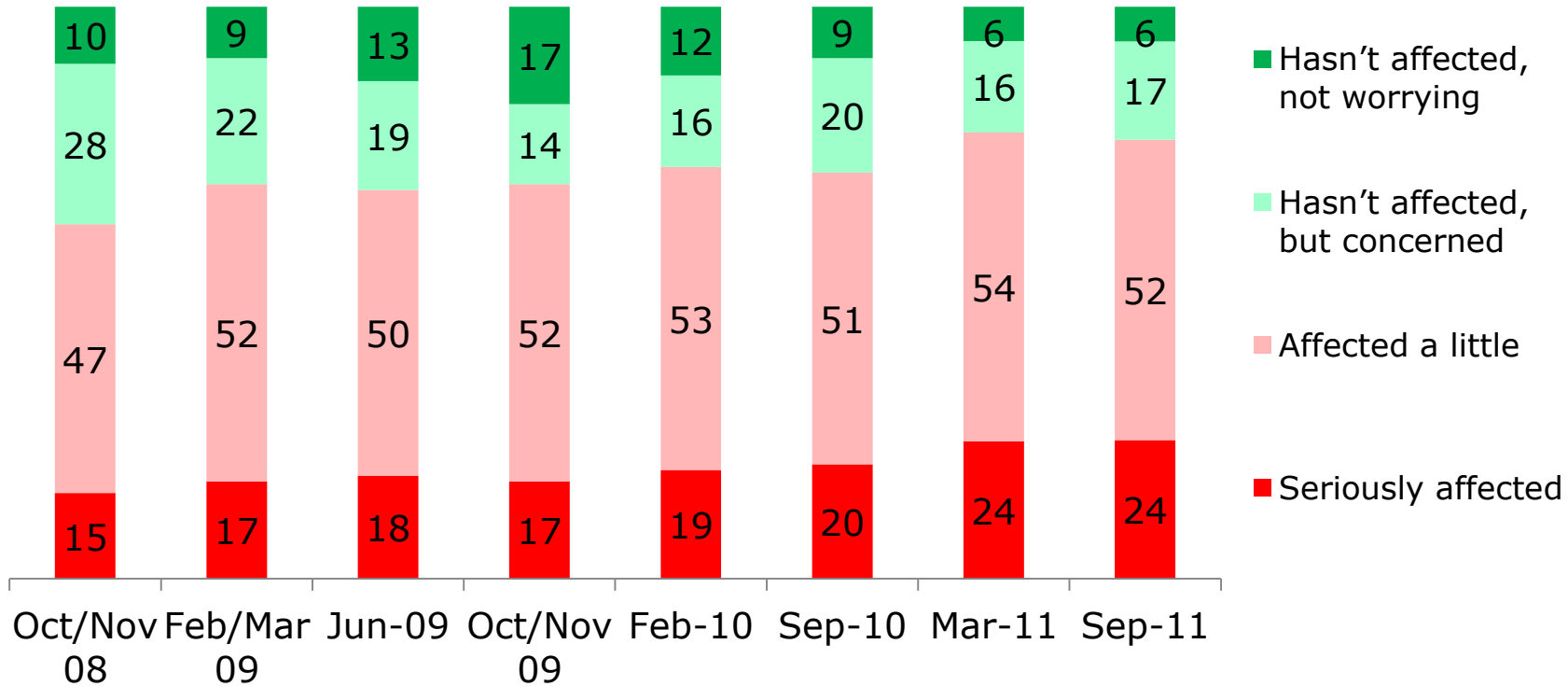
% 'Strongly agree'/'Slightly agree' with each statement



Q1. To what extent do you personally agree or disagree with the following statements about the economic downturn or credit crunch? Base: All respondents (1000+) Differences of c 5% are significant)

Three quarters personally affected by the economic downturn – few are unconcerned

Impact of economic downturn (%)

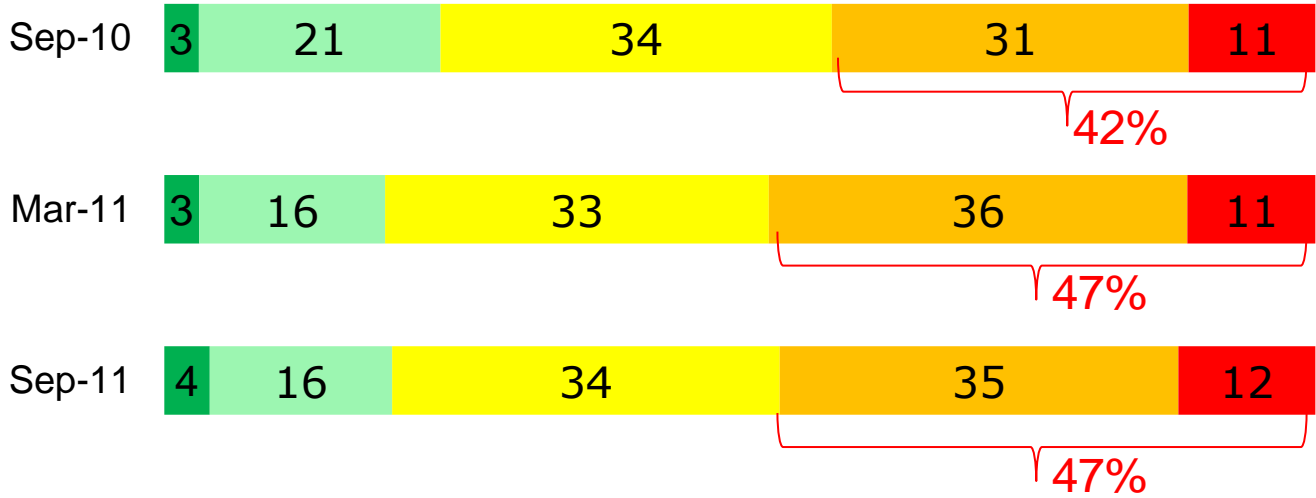


Q2. Which of the following best describes your feelings about the economic downturn or credit crunch?
 Base: All respondents (1000+) Differences of c 5% are significant)

As in March, c. half expect their financial situation to get worse in the next year

How expect personal financial situation to change in coming year (%)

■ Much better ■ A little better ■ No better or worse ■ A little worse ■ Much worse

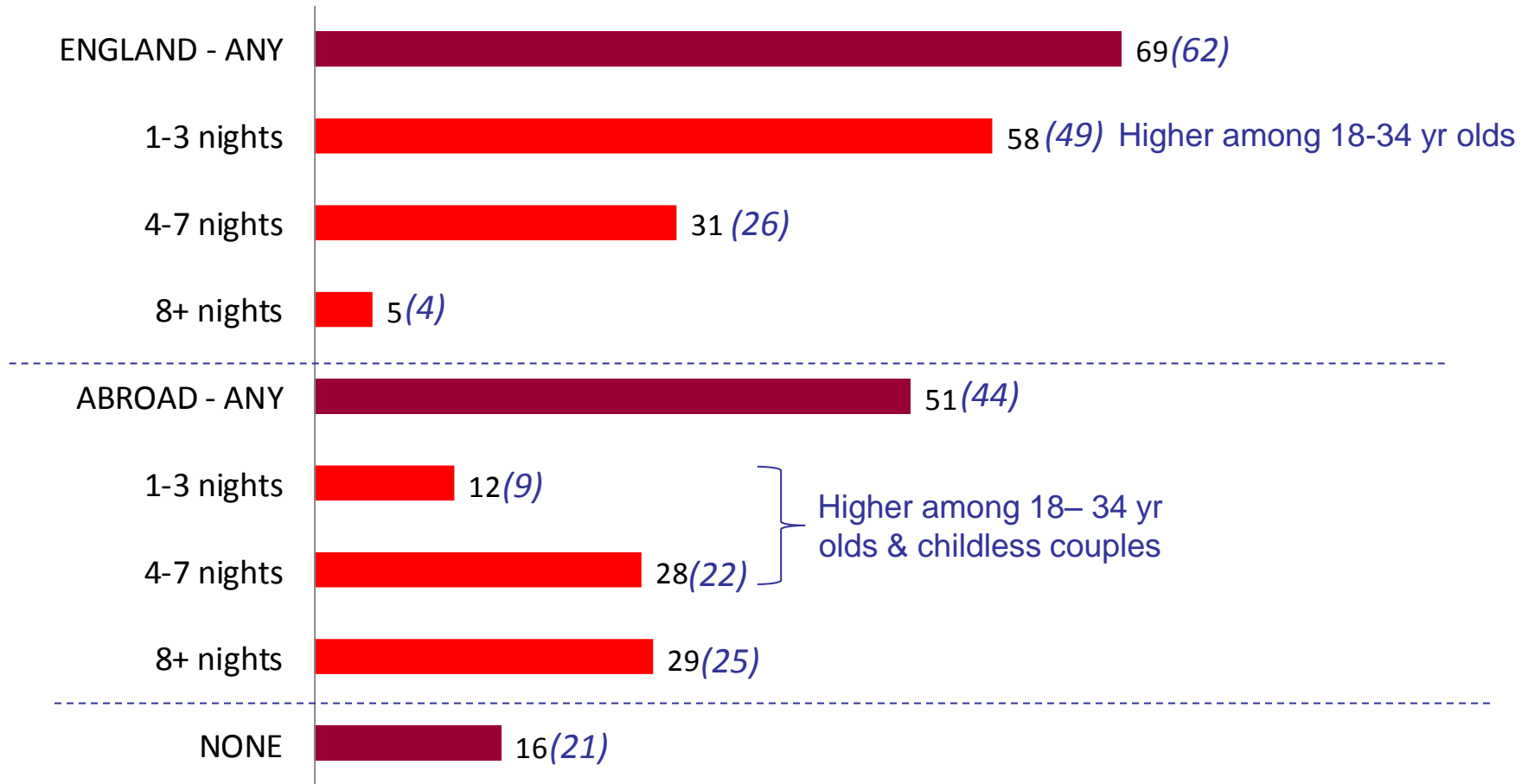


Q2b. Q2b: How do you think your personal financial situation will change in the coming year?
Base: All respondents (1000+)

THE 2011 HOLIDAY

7 in 10 holidayed in England in 2011; only longer holidays more likely to be abroad

% took holiday type in 2011 (figs in brackets show % already taken this year)

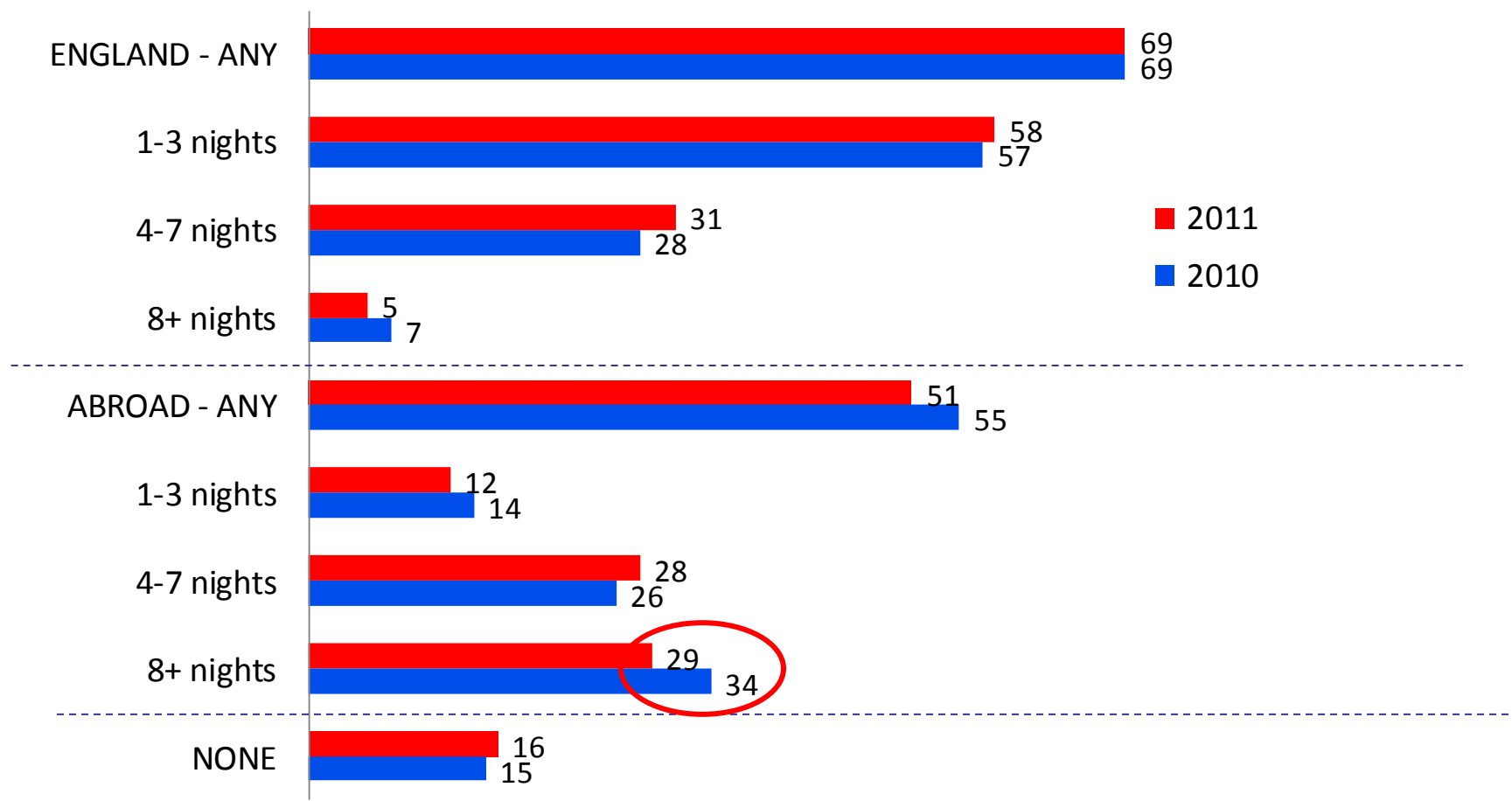


Q7/9d How many of each of these holidays have you taken so far in 2011/will you take before the end of 2011? Base: All 1000+

Slightly fewer took holidays abroad in 2011 vs 2010 – especially 8+ night trips

-slight increase in 4-7 night England breaks

% took holiday type in 2011/ 2010



Q7/9d How many of each of these holidays have you taken so far in 2011/will you take before the end of 2011? Base: All 1000+

'Switchers' and 'Extras' – A Reminder

- 'Switchers' took at least one holiday in England that directly replaced a holiday they would have taken abroad
- 'Extras' took more domestic holidays than they had done previously
- Together, these groups ('Staycationers') drove the uplift in domestic holidays in 2009 and 2010

3 in 10 were 'Staycationers' in 2011 – more both 'switching' and taking extra holidays

% Staycationer Types 2009 - 2011

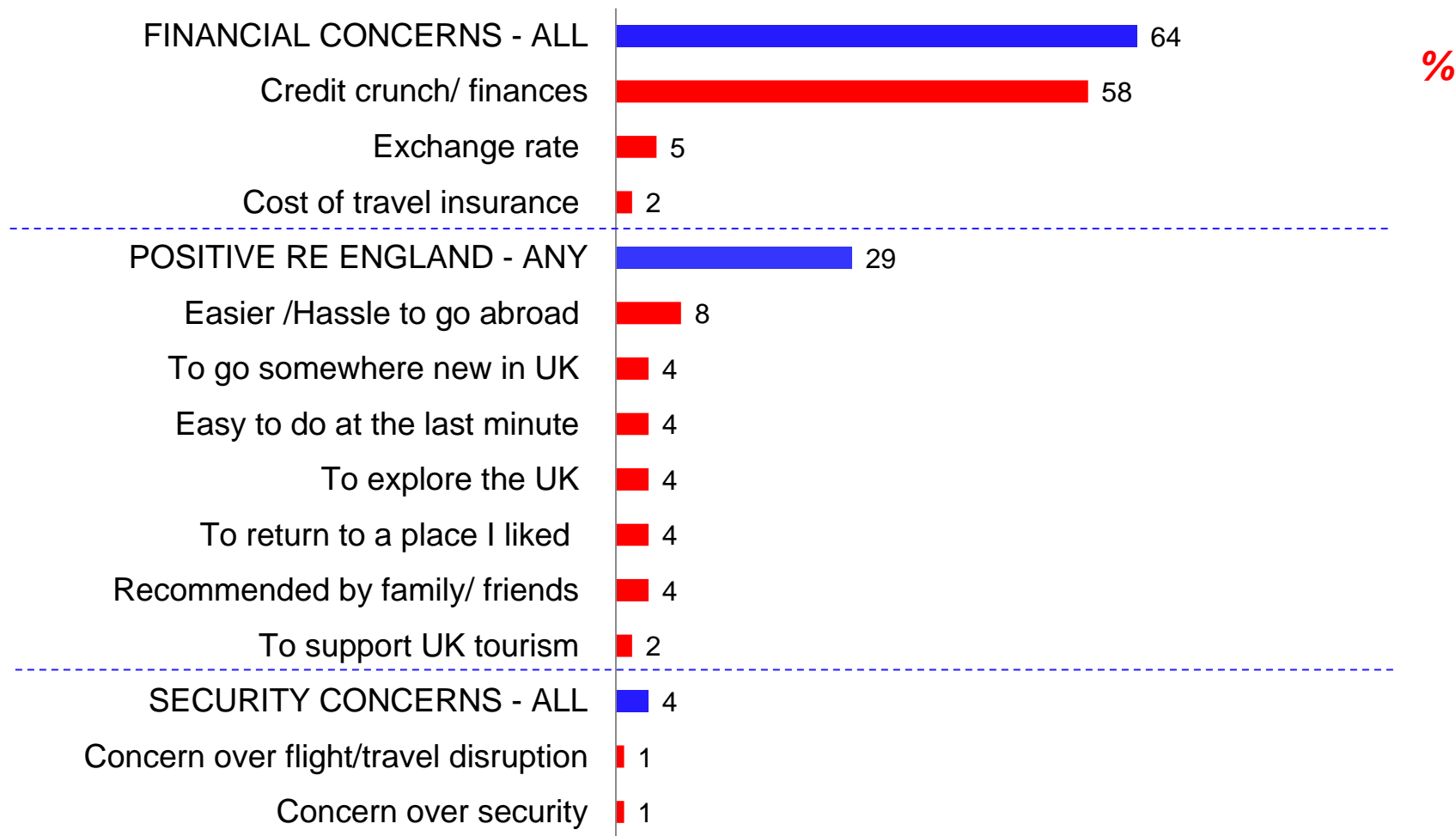


Switcher profile now has a slightly higher proportion of men, ABs and couples than in 2009

■ Switcher / Less UK Hol ■ Switcher / Same UK Hol ■ Switcher AND Extra ■ Extra Only

The **MAIN** reason for 'switching' is financial, though 3 in 10 do so for positive reasons

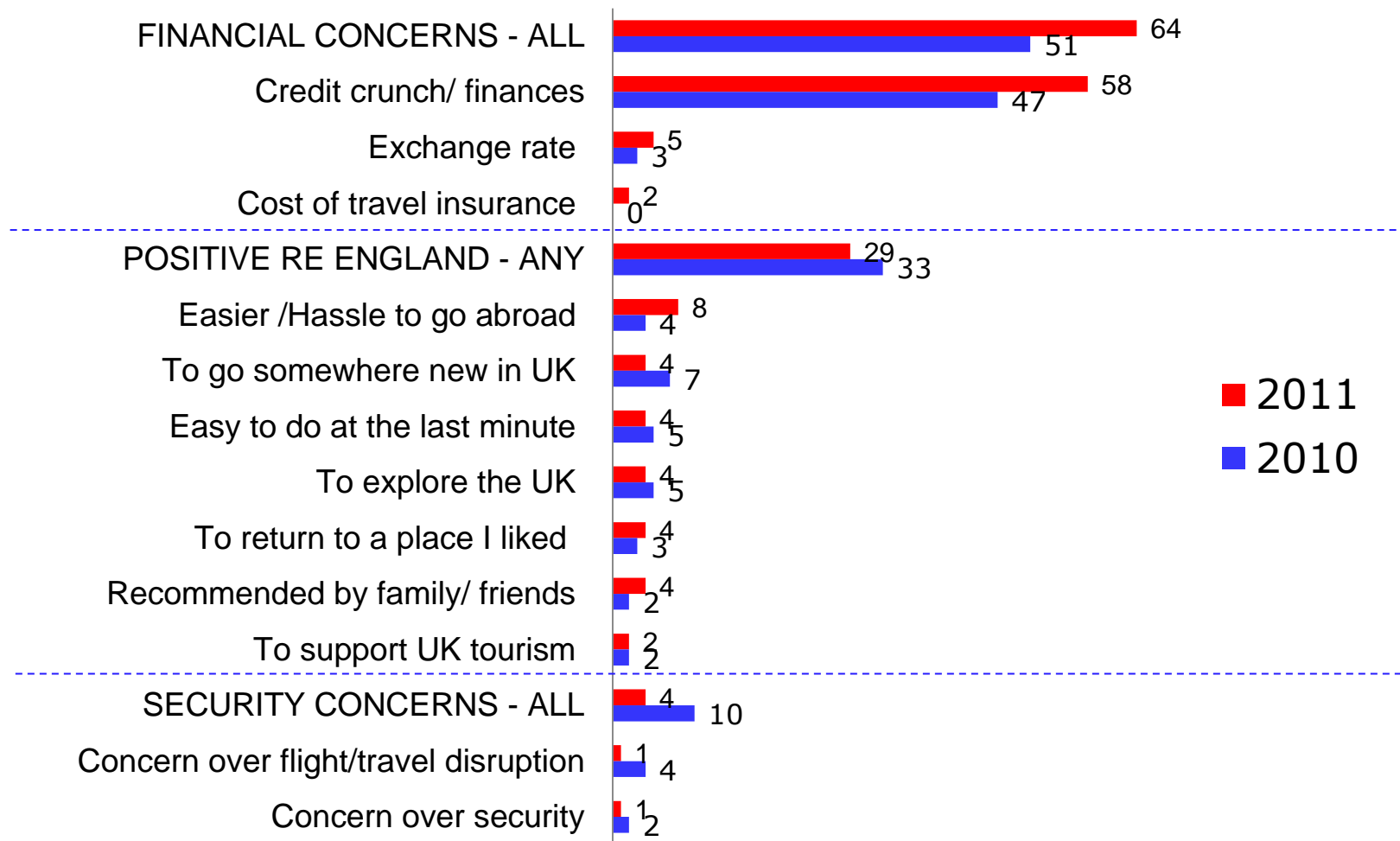
MAIN REASON for replacing a 2011 hol normally taken abroad with one in England



Q9a Why did you replace a holiday you'd normally take abroad with one in England last year? Base: Those taking hol in England that would normally have been taken abroad (2011 = 216)

The importance of financial constraints for 'switching' has increased since 2010

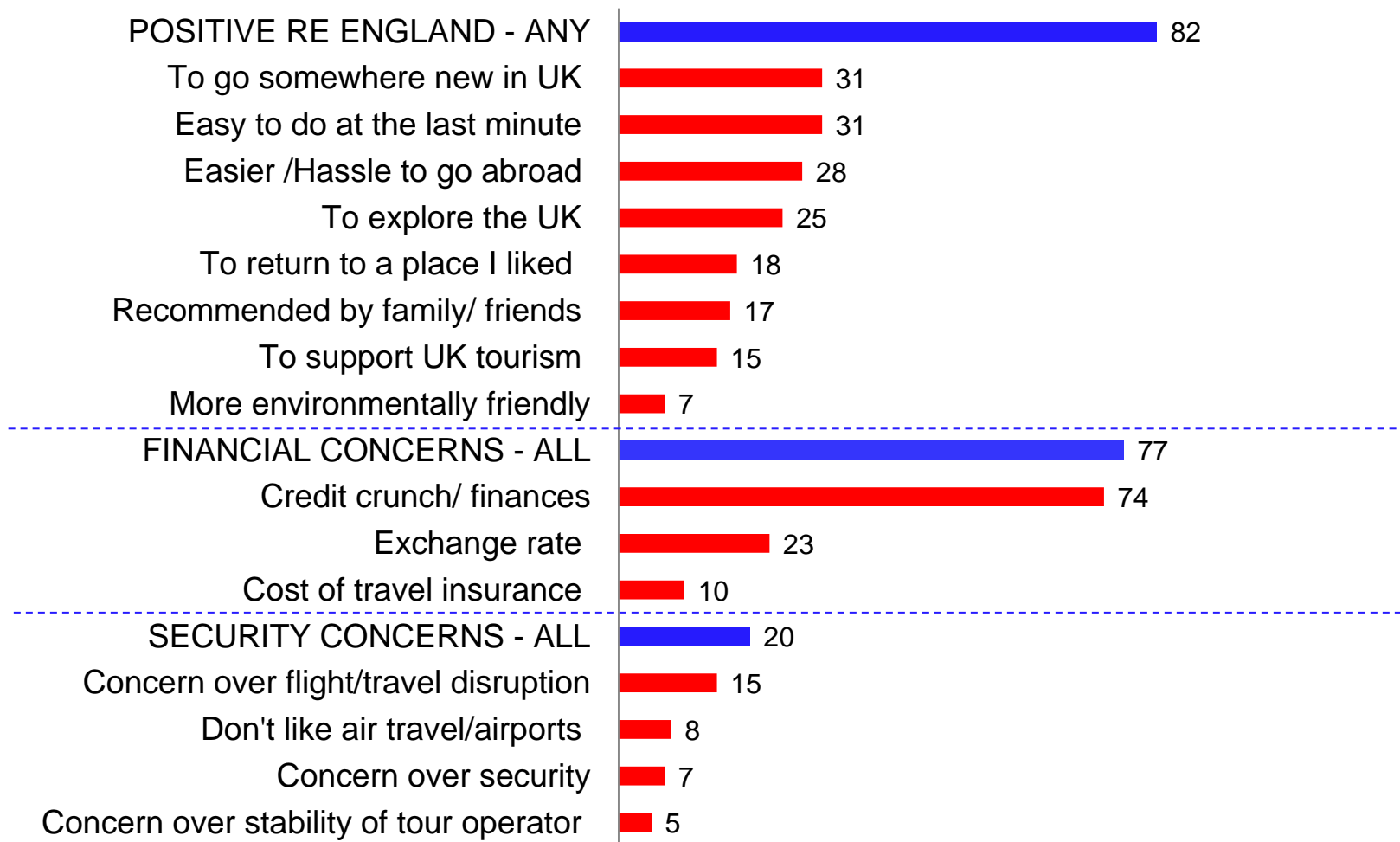
MAIN REASON for replacing a holiday normally taken abroad with one in England



Q9a Why did you replace a holiday you'd normally take abroad with one in England last year? Base: Those taking hol in England that would normally have been taken abroad (2011 = 216)

Positive aspects of England are very strong additional reasons for 'switching'

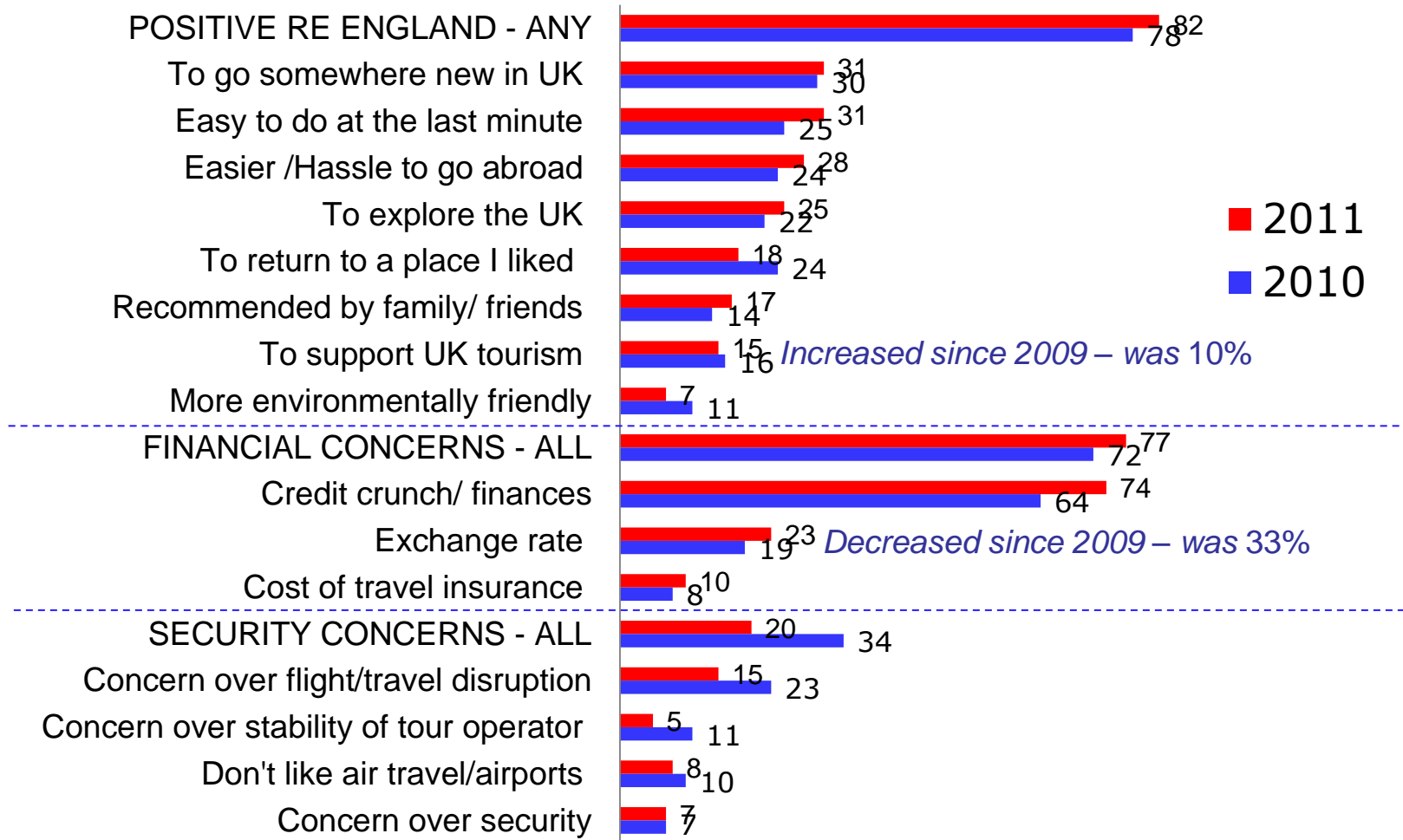
ALL REASONS for replacing a holiday normally taken abroad with one in England



Q9a Why did you replace a holiday you'd normally take abroad with one in England last year? Base: Those taking hol in England that would normally have been taken abroad (2011 = 216)

Importance of economy for 'switching' increased since 2010, security concern lower

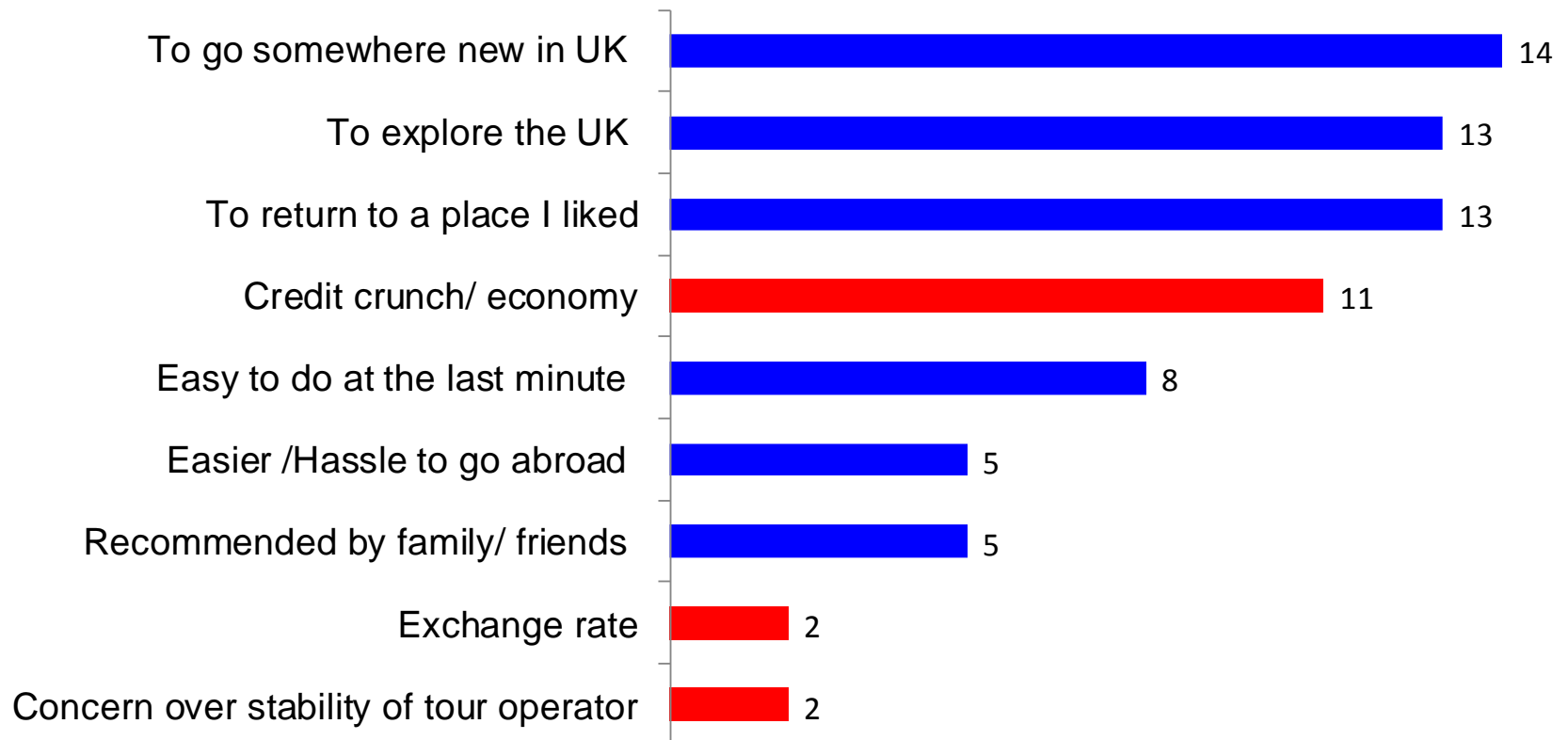
ALL REASONS for replacing a holiday normally taken abroad with one in England



Q9a Why did you replace a holiday you'd normally take abroad with one in England last year? Base: Those taking hol in England that would normally have been taken abroad (2009= 134, 2010=177 2011 = 216)

Extra UK holiday taken for positive reasons more than financial or security concerns

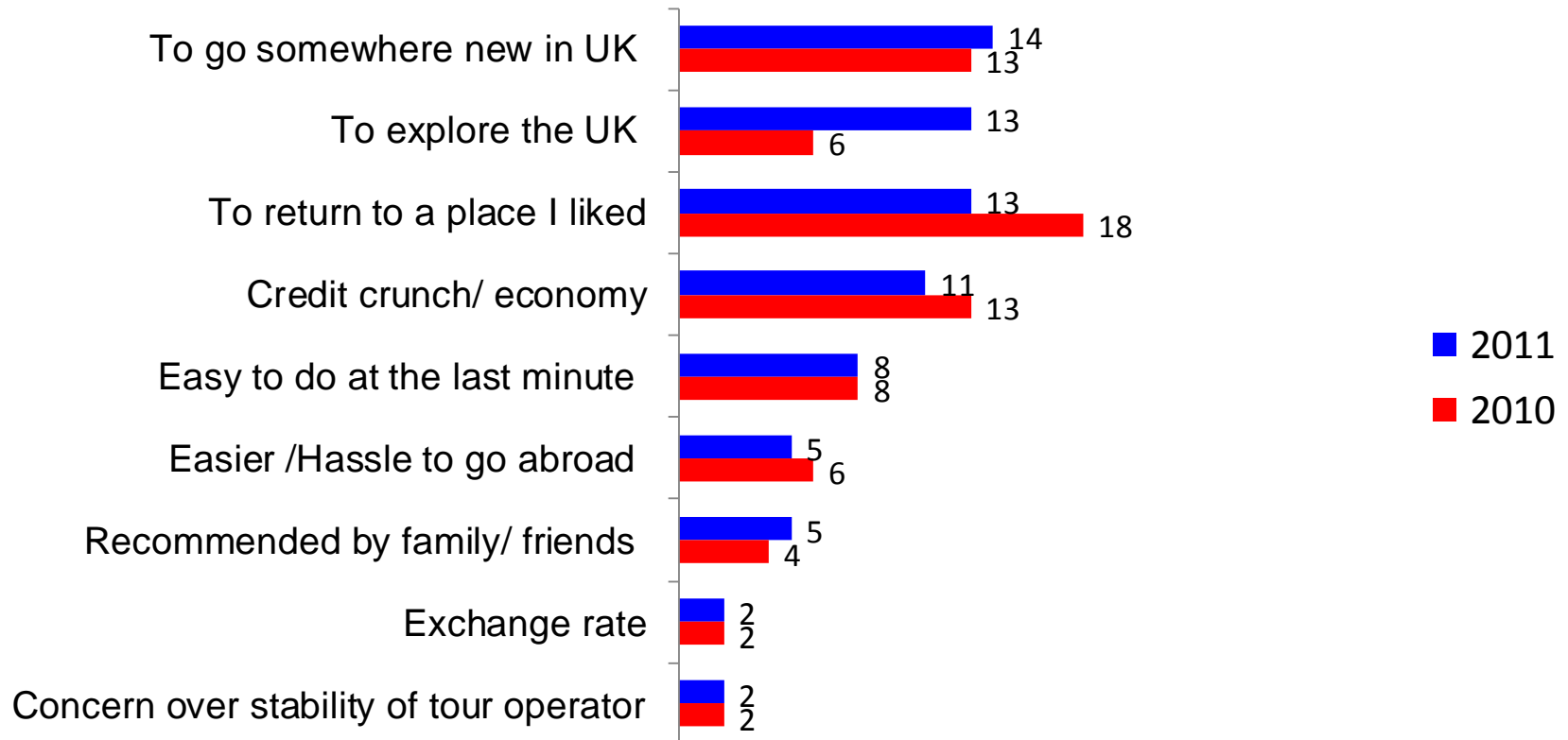
MAIN REASON for taking MORE holiday in UK in 2011
(among those not replacing a holiday normally taken abroad)



Q11a What was your MAIN reason for taking more holidays in the UK during 2011 than you used to? Base: Those taking more hol in England but not having switched from a holiday abroad (2011=106)

Exploring somewhere new increased in importance for taking extra holiday

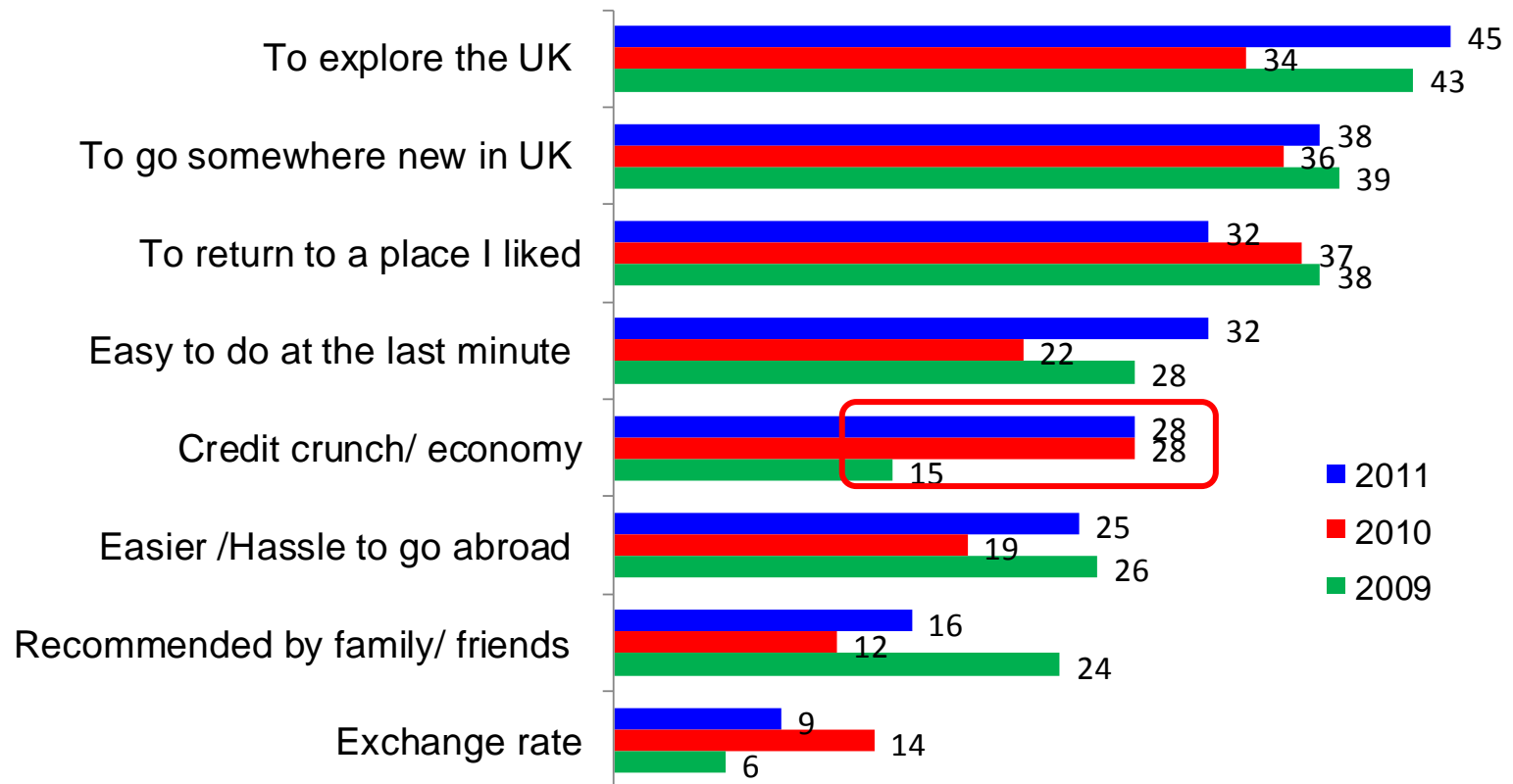
MAIN REASON for taking **MORE** holiday in UK
(among those not replacing a holiday normally taken abroad)



Q11a What was your MAIN reason for taking more holidays in the UK during 2011 than you used to? Base: Those taking more hol in England but not having switched from a holiday abroad (2010=87, 2011=106)

The economy has become more important as a supporting reason for taking extra UK holiday

ALL REASONS for taking MORE holiday in UK
(among those not replacing a holiday normally taken abroad)



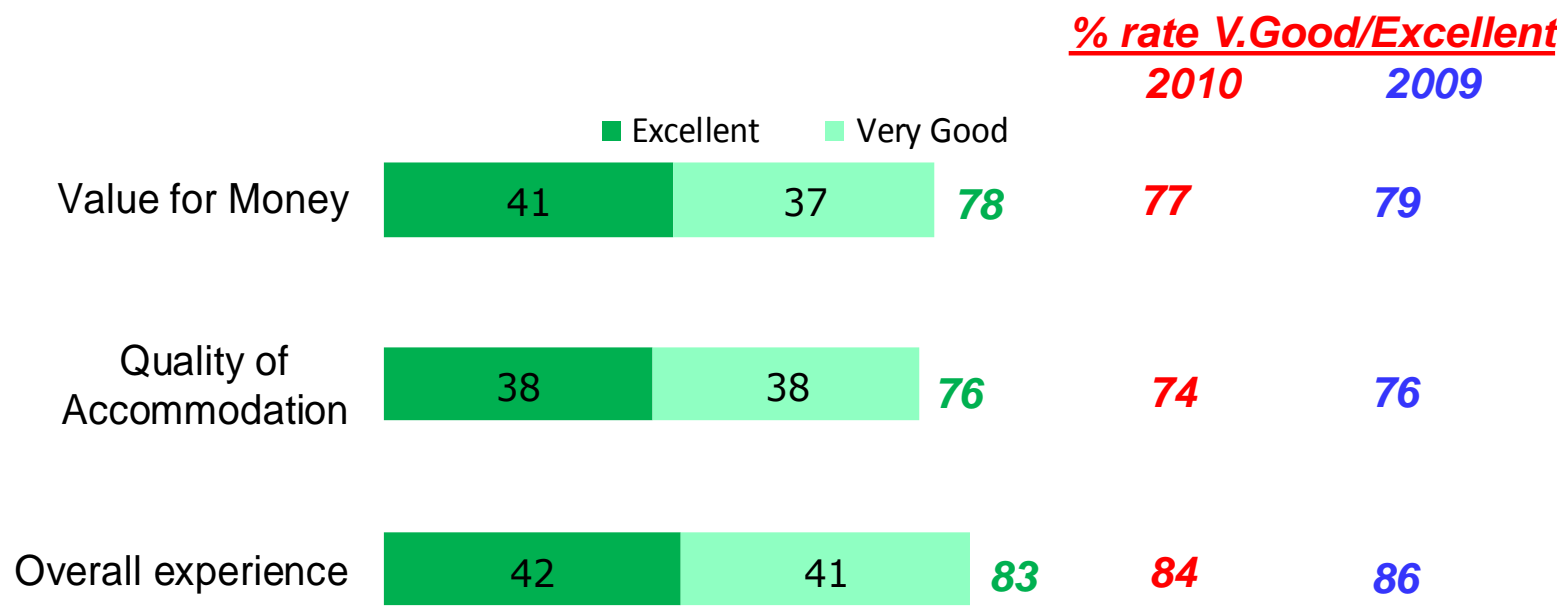
Q11a/b What was your MAIN reason for taking more holidays in the UK during 2011 than you used to? And which other reasons influenced you? Base: Those taking more hol in England but not having switched from a holiday abroad (2009=124, 2010=87, 2011=106)

THE 2011 EXPERIENCE

- *How was the experience?*
- *How will this impact on 2012 plans...and beyond?*

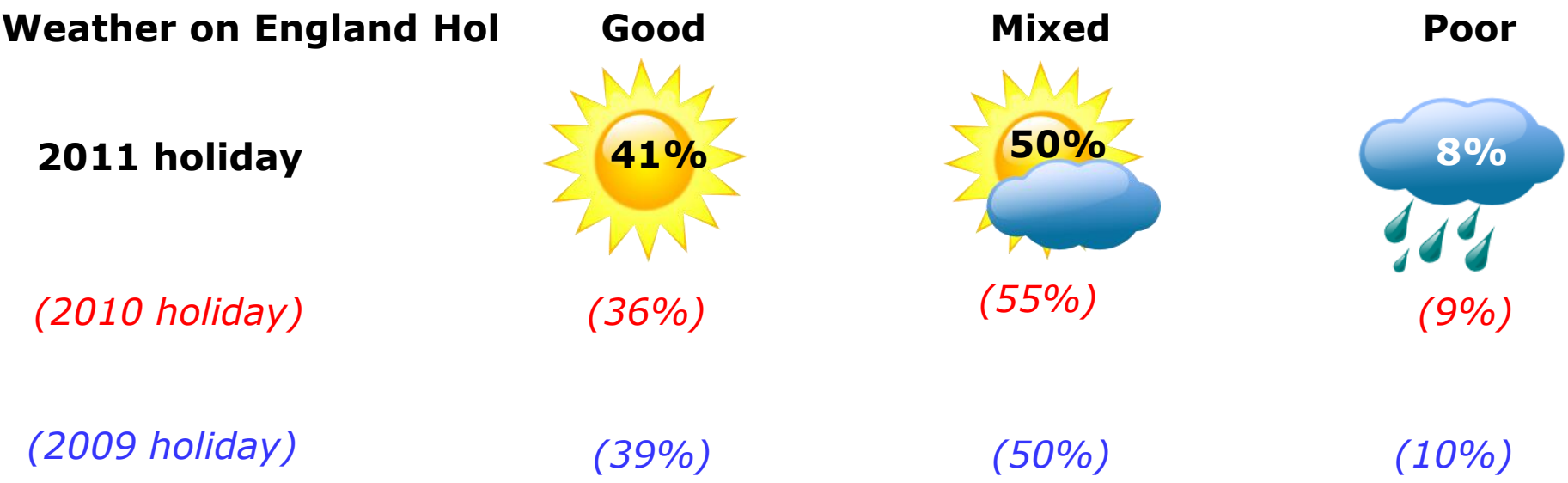
England holidays continue to deliver a great experience

Rating of England holiday taken, on: (%)



Q19. How would you rate this holiday/ break on? (Excellent, Very good, Satisfactory, Poor, Very poor)

Weather perceptions slightly better overall in 2011 to date vs 2010



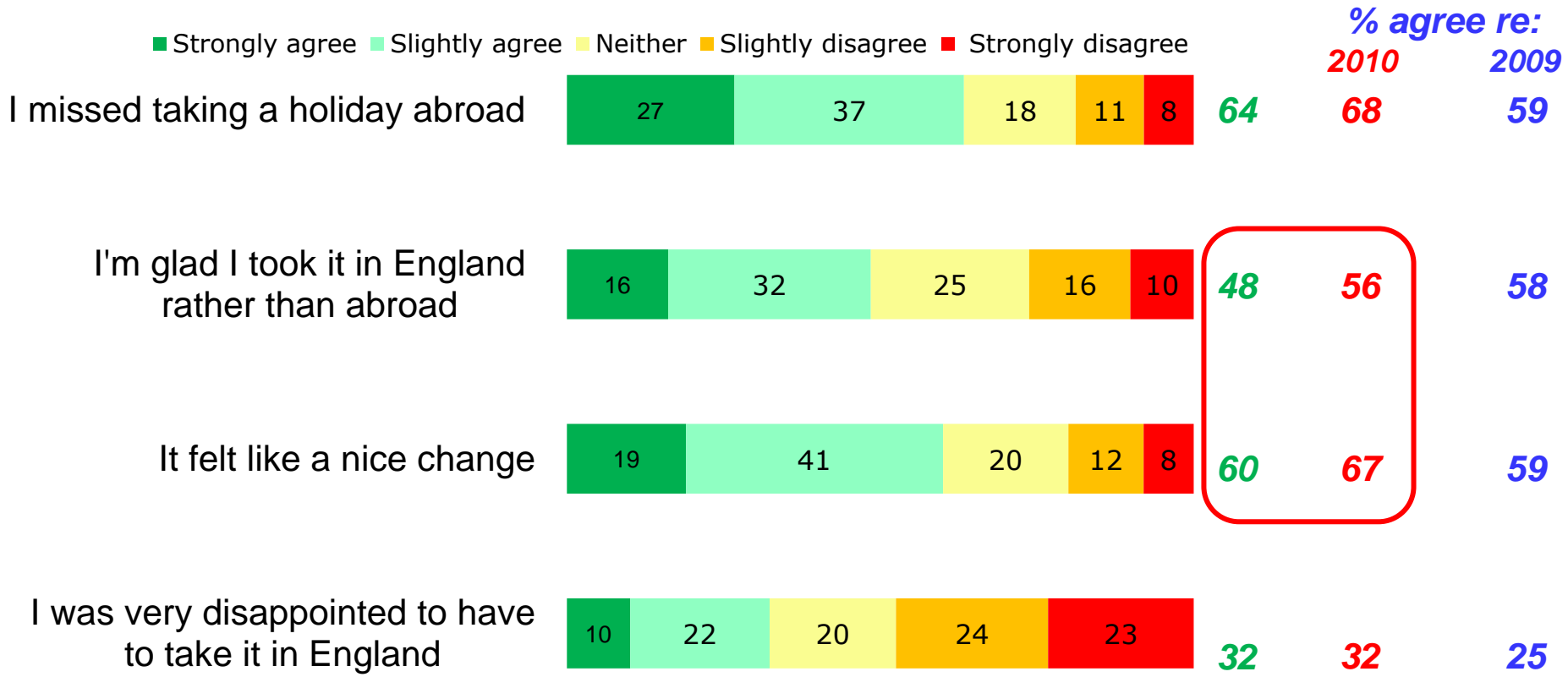
- As may be expected, the weather affects the overall rating of the holiday

Holiday Experience

% Excellent/Very Good	89%	79%	67%
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Slight drop in % feeling glad that they switched to a holiday in England

Attitudes to taking a holiday in England rather than abroad in 2010 (%)

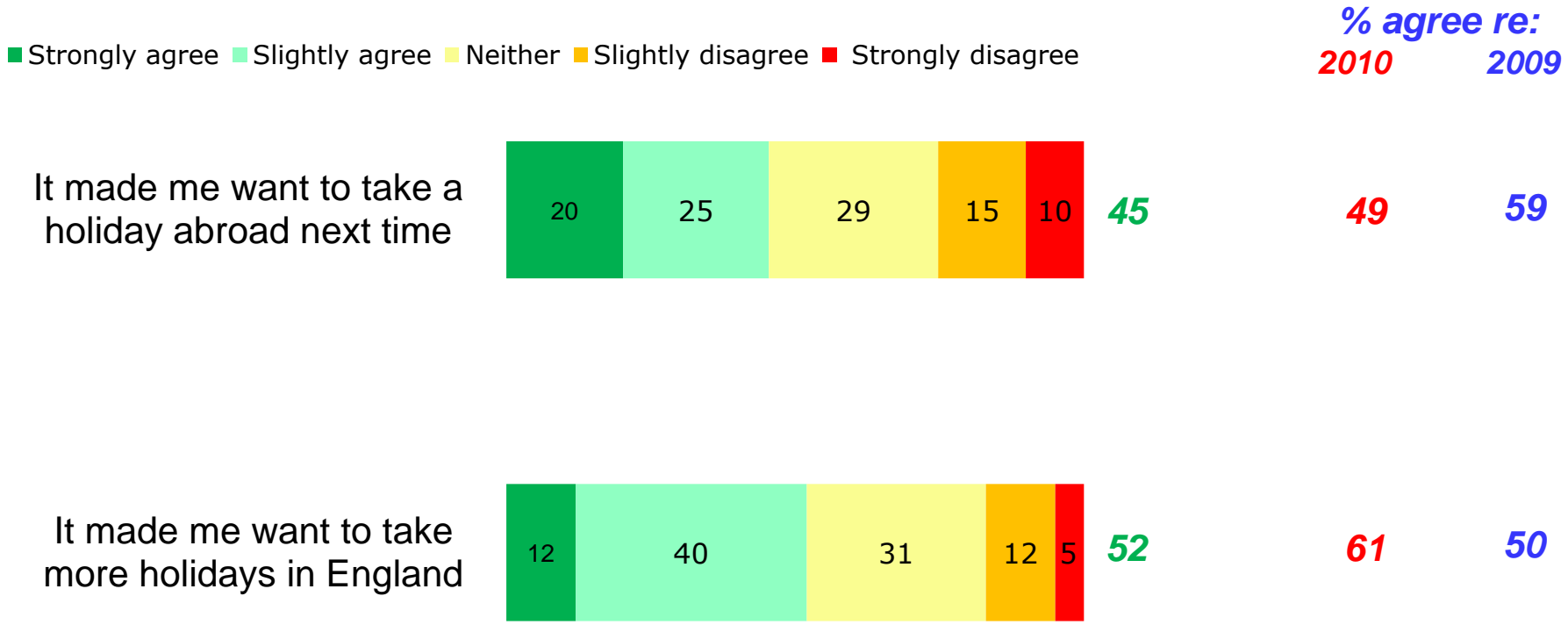


Q9c/3e To what extent do you personally agree/disagree with the following statements about replacing your holiday abroad with one in England? Base: Those taking hol in England that would normally have been abroad (2009=155, Sept 10=177 Sept 2011=186)

Half of Switchers want to take more holiday in England as a result of holidaying here

- Though almost half are motivated to want a holiday abroad next time

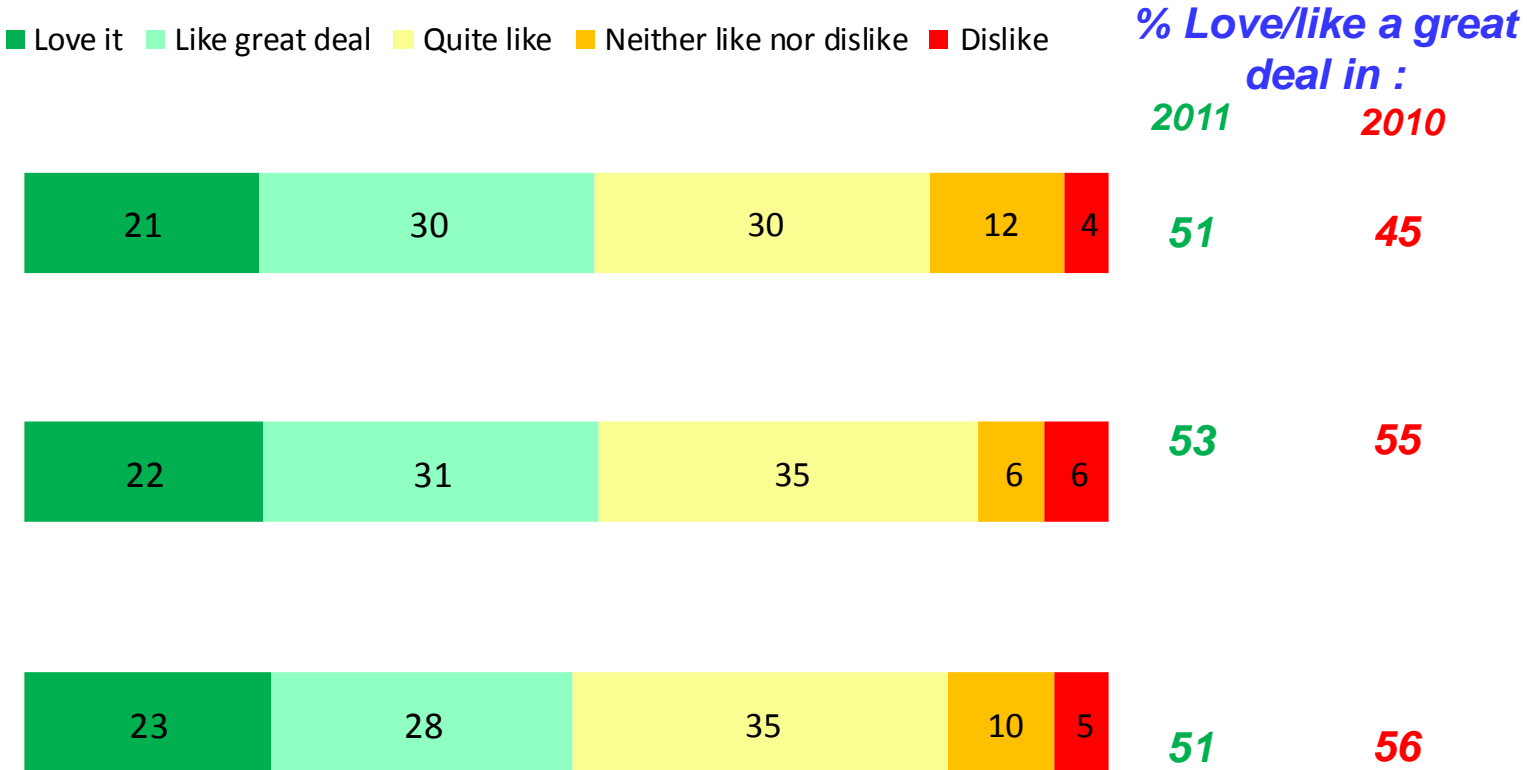
Attitudes to taking a holiday in England rather than abroad in 2011 (%)



Q9c/3e To what extent do you personally agree/disagree with the following statements about replacing your holiday abroad with one in England? Base: Those taking hol in England that would normally have been abroad (2009:155 2010:177 2011:186)

Views towards English holidays are very positive and very few dislike the idea

Overall extent of liking holidaying in England (%)



Q24 Overall, how much do you like or dislike taking a holiday in England? Base: All (1000+)

Discovering *new* places in England remains key. Half feel pride via English holidays

Attitudes to taking a holiday in England (%)

■ Strongly agree
 ■ Slightly agree
 ■ Neither
 ■ Slightly disagree
 ■ Strongly disagree

% agree strongly/agree

Sep '11
Feb '10
Sep '10

I love discovering new places in England

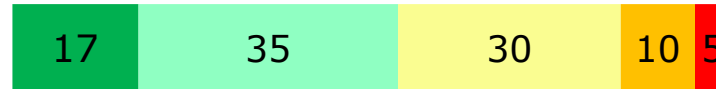


71

72

75

On Eng hols love going back to favourite places

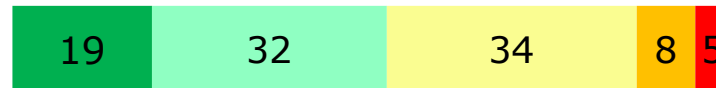


52

53

51

Taking Eng hols makes me feel proud of what it has to offer



51

50

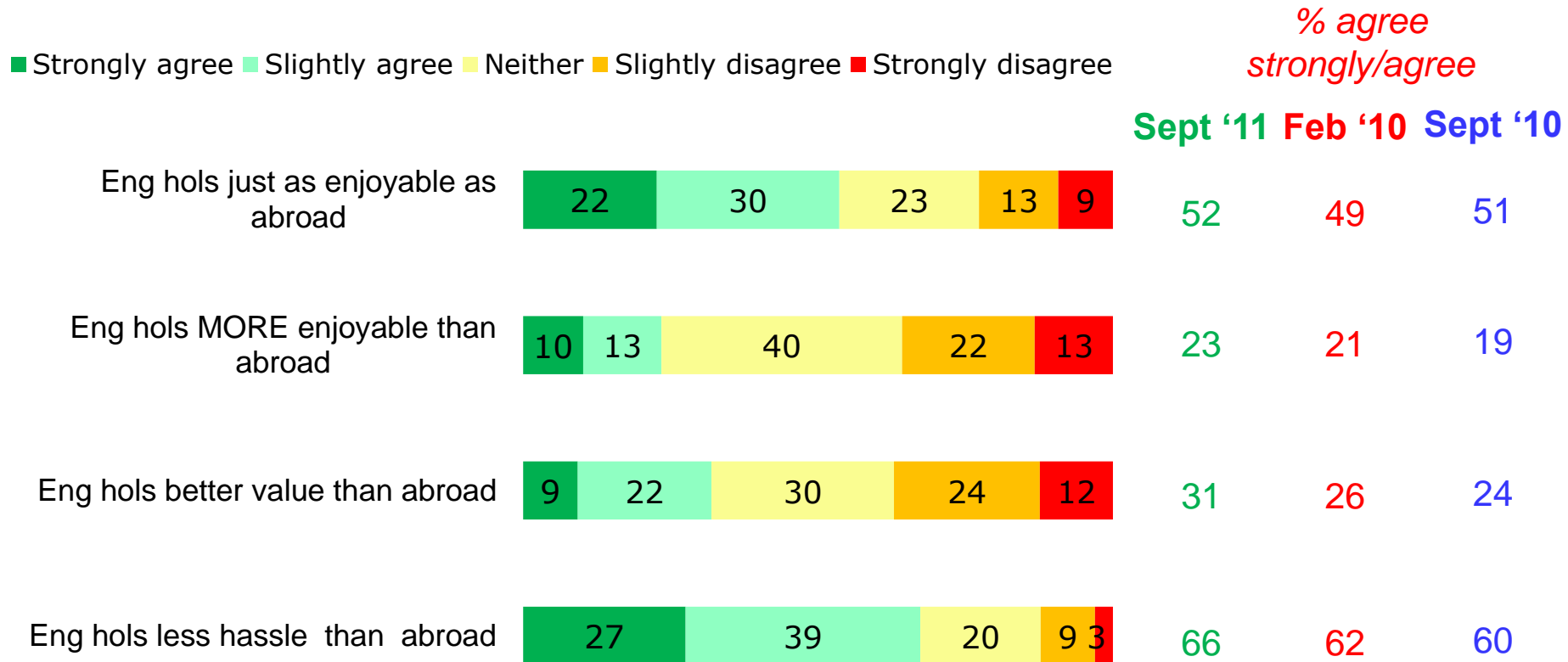
49

Q10a To what extent do you personally agree or disagree with the following statements about taking a holiday in England?

Base: All (1000+)

England breaks less hassle but some view those abroad as more enjoyable/better value

Attitudes to taking a holiday in England (%)



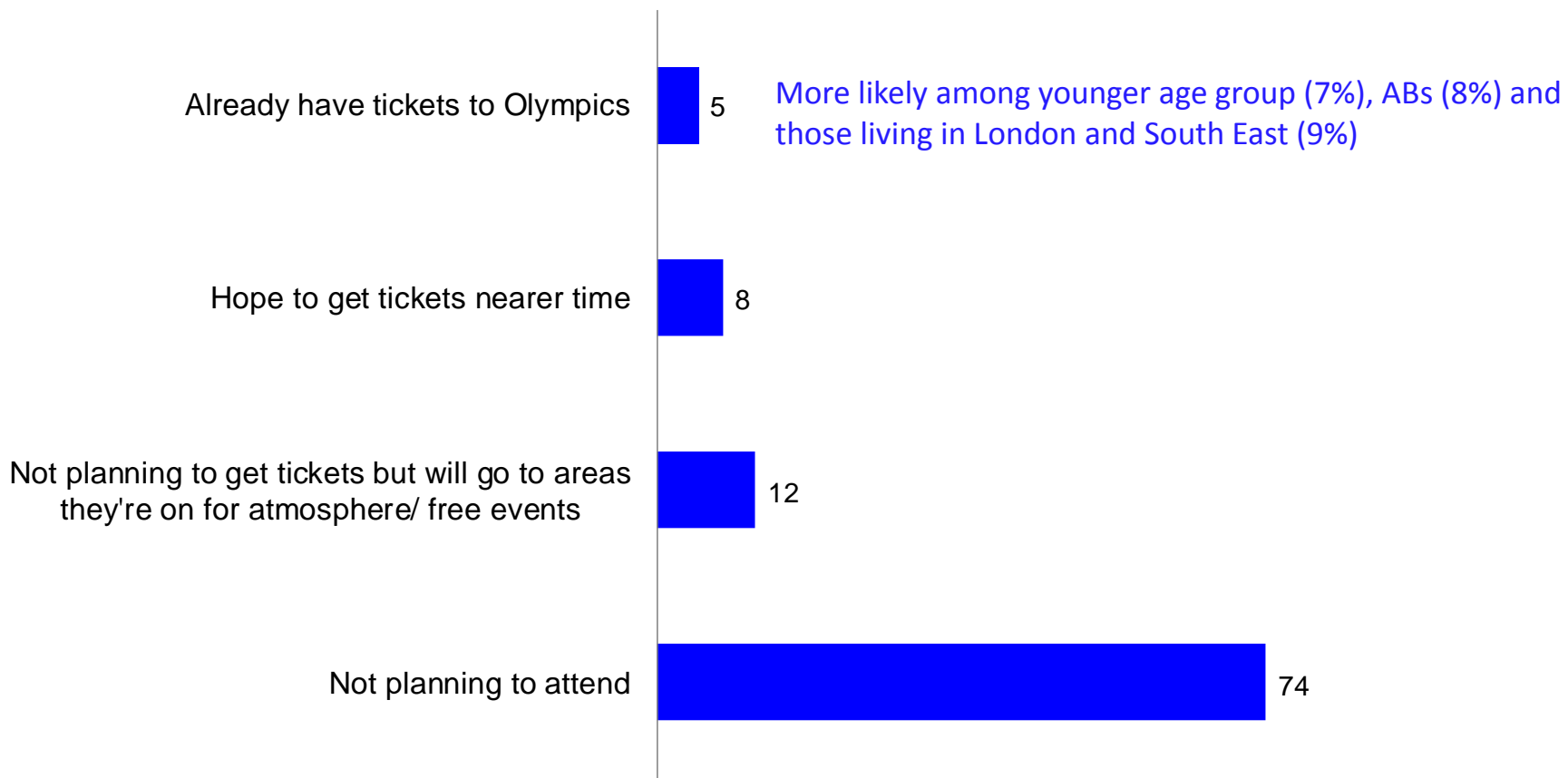
Q10a To what extent do you personally agree or disagree with the following statements about taking a holiday in England? Base: All

THE LONDON 2012 OLYMPIC GAMES

- *Who is visiting?*
- *What impact will the Games have on domestic tourism in 2012?*

Almost 2 in 10 do not have Olympic tickets but hope to visit the Games

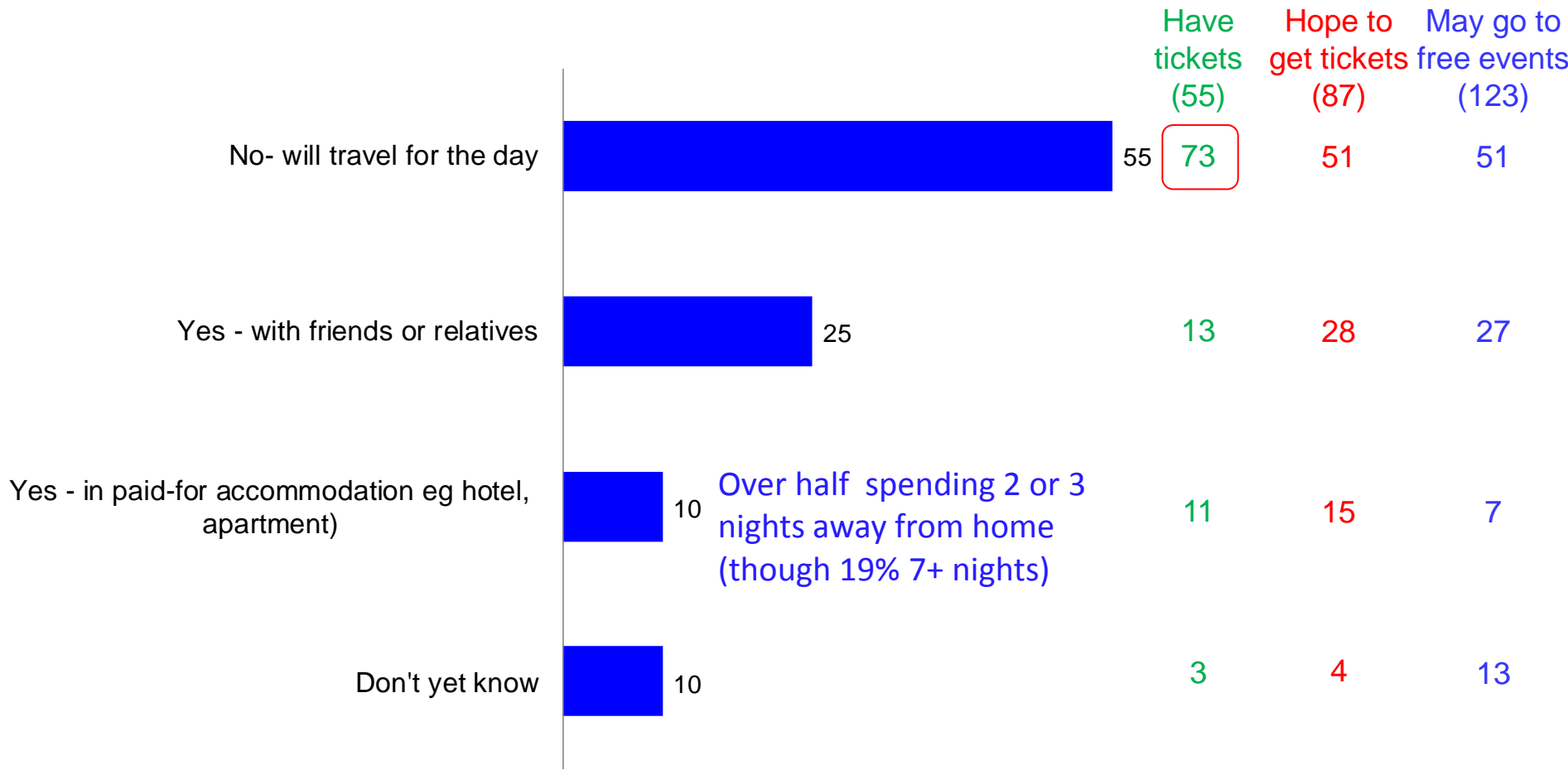
Status re London 2012 Olympic Games (%)



Q 33 Which of these best describes you in relation to the London 2012 Olympic Games? Base: All (1000+)

Just 1 in 10 going to the Games expect to stay in hotels etc, typically for 2 or 3 nights

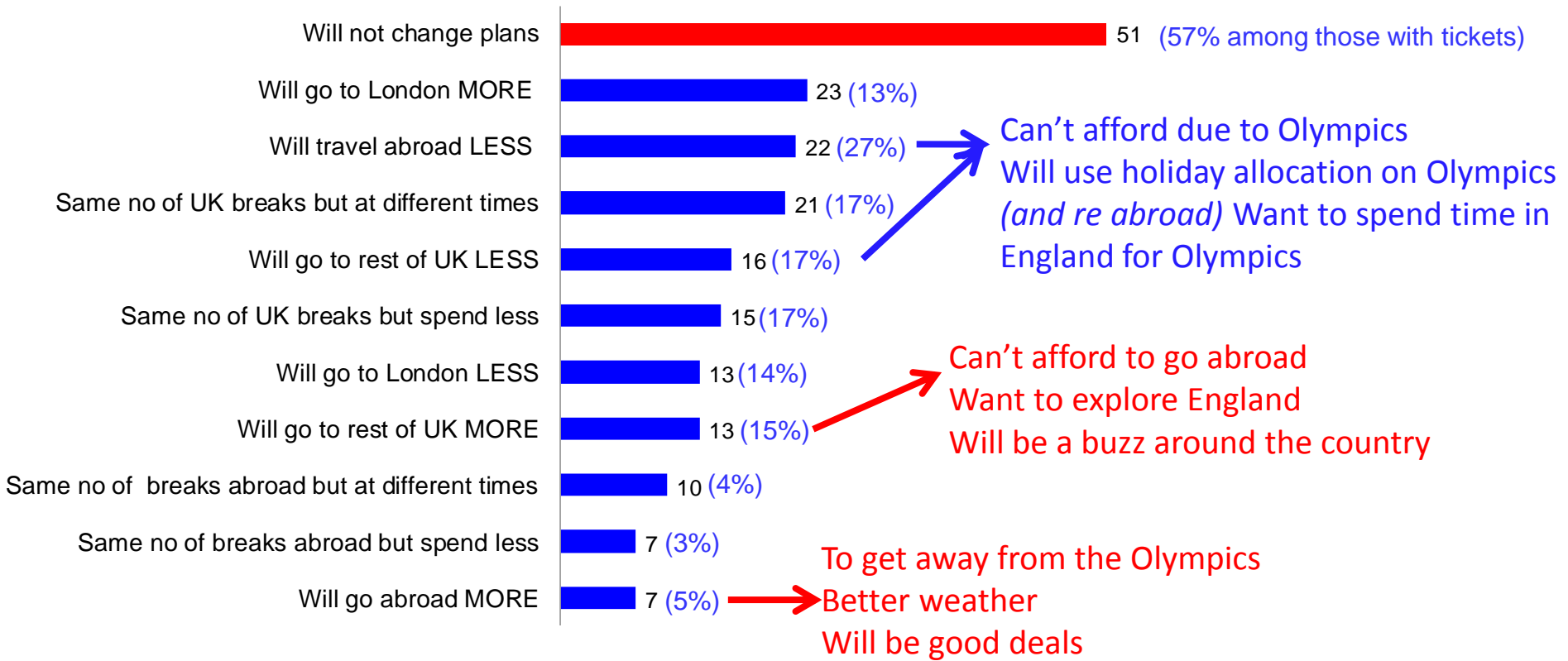
Whether visitors to the Games (or areas they're in) will stay away from home (%)



Q 34/35 In order to go to the Olympics will you be staying away from home? For how many nights? Base: Those planning to go to the Games (278)

Half of those planning to go to the Games will change their '12 holiday plans as a result

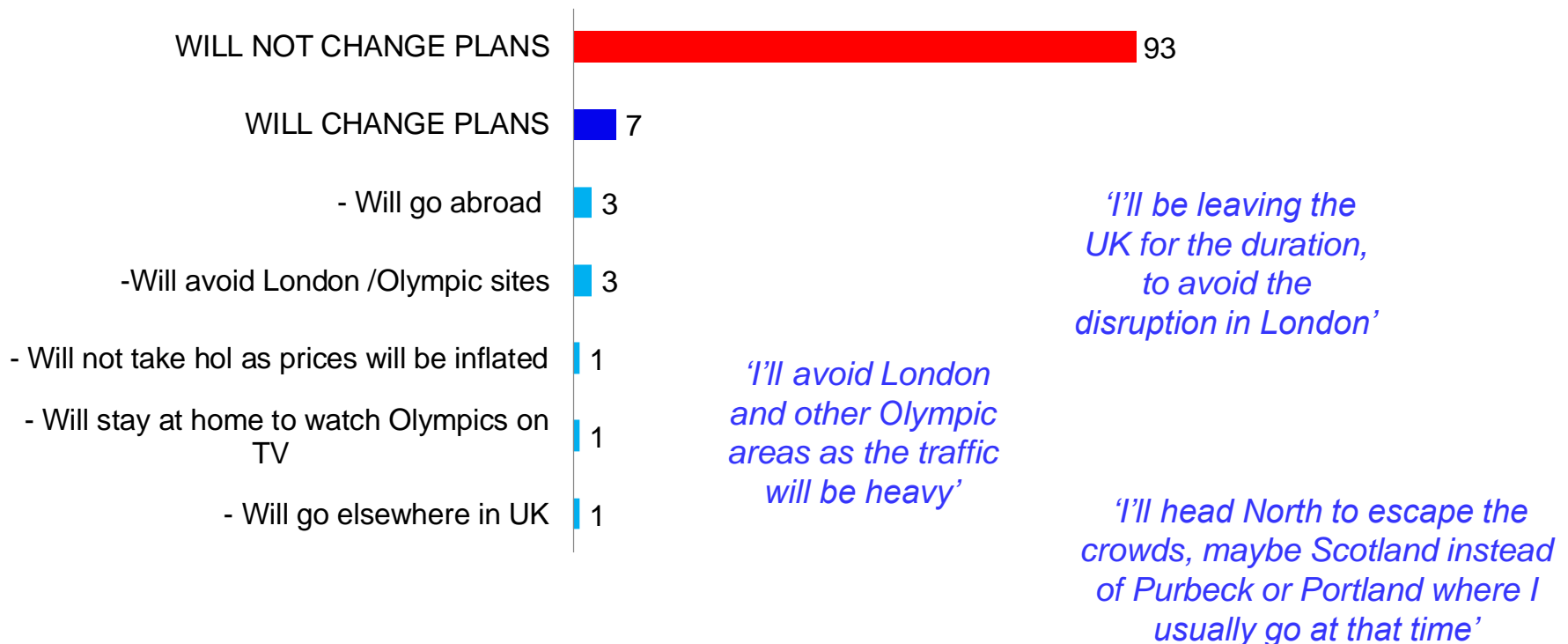
How, if at all, will visiting the Games change 2012 holiday plans (% - can mention all that apply)



Q 36 How if at all will attending the Games change your holiday plans for 2012? Base: Those planning to go to the Games (278) Figs in brackets are among those with tickets to the Games (55)

2012 holiday plans largely unchanged among those NOT planning to go to the Games

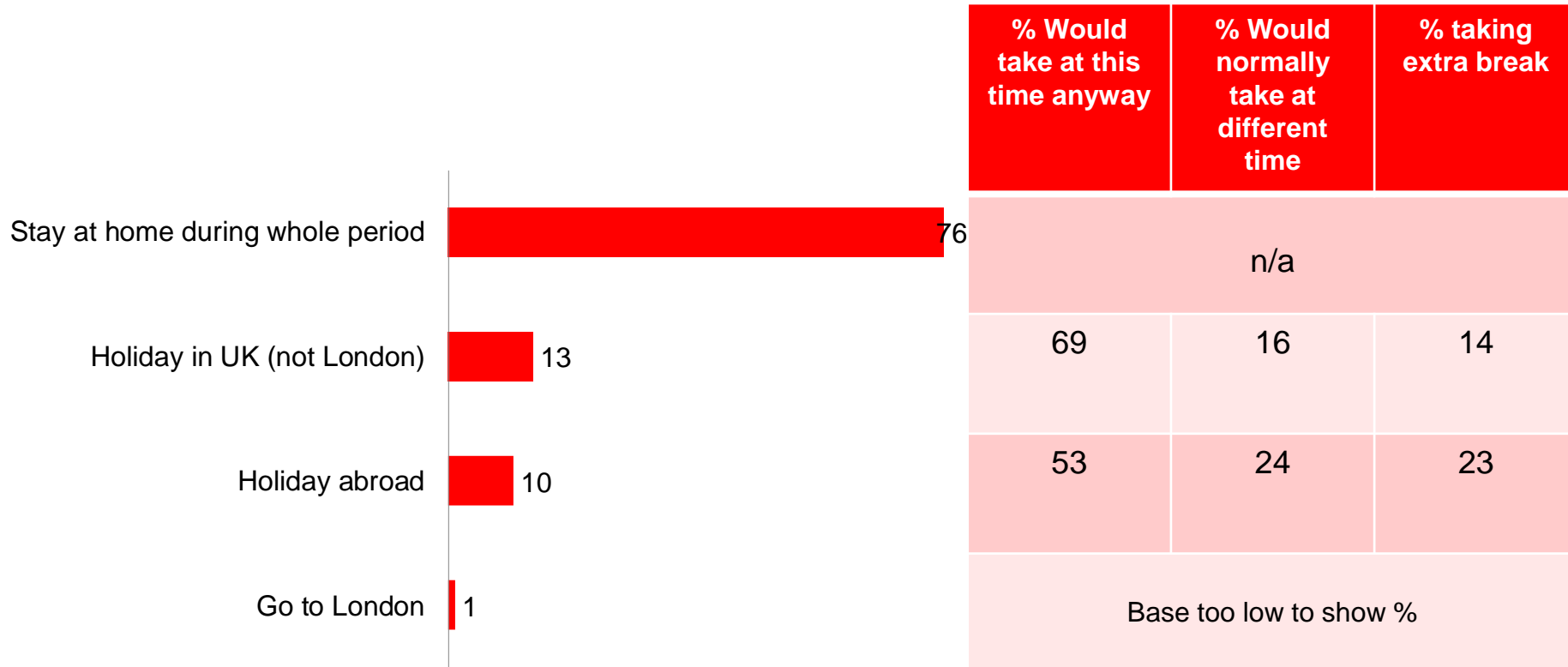
How the London Games will change 2012 holiday plans for those NOT visiting the Games (%)



Q 38 As a result of the Olympic Games, do you think you will make any changes to the holidays you'll take in 2012, whether in the UK or abroad? Base: Those NOT planning to go to the Games (729)

Three quarters not going to the Games will stay at home during them

What those not going to the London 2012 Games expect to do while they're on (%)



Q 40 During the Games, what do you expect that you will do? Base: Those NOT planning to go to the Games (729)

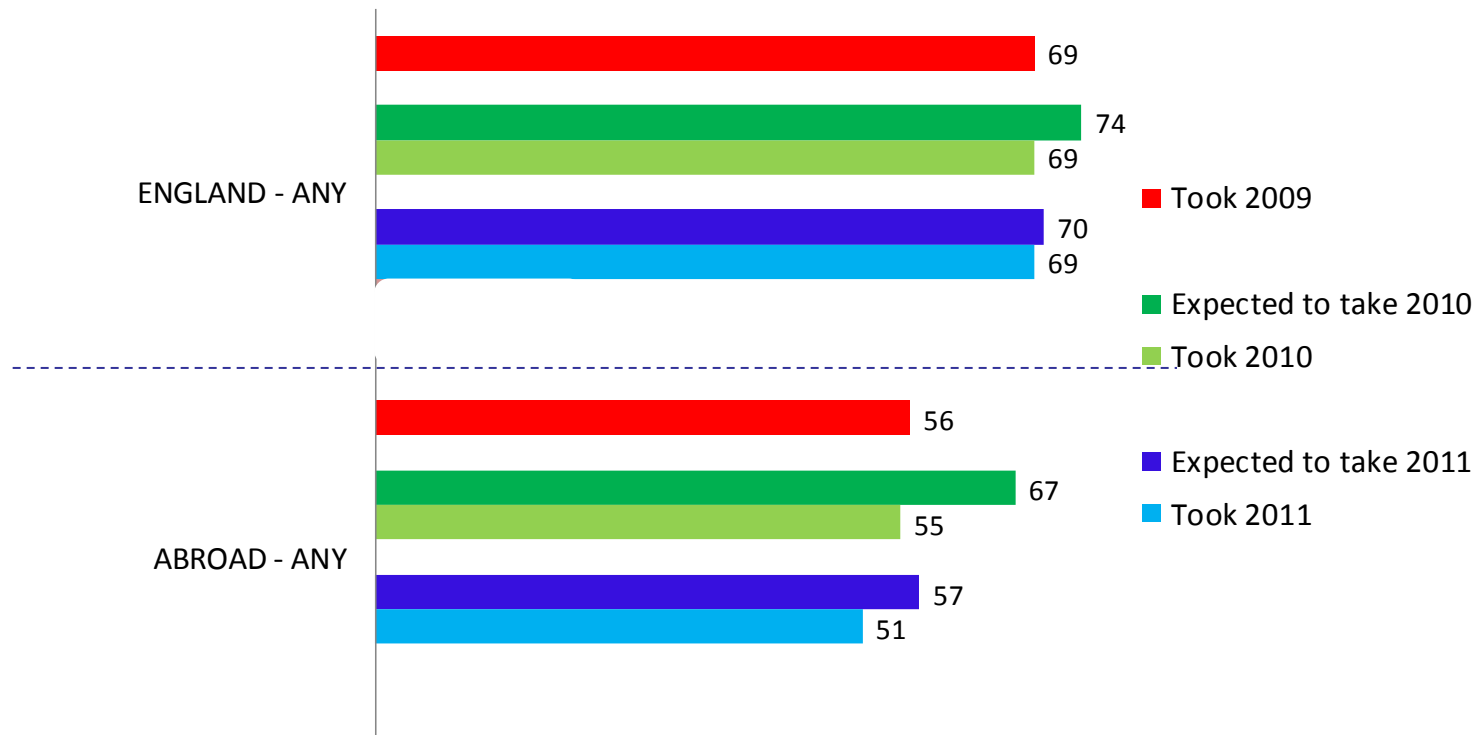
2012 AND BEYOND

- *What holidays are people expecting (hoping?) to take in 2012?*
- *Hopes for holidays in a stable economic climate*

Holiday plans – particularly those abroad - have tended to be optimistic vs reality

- though less over-optimism re 2011 than re 2010

2011 holidays: expectations vs reality (% expecting to take/ having taken)

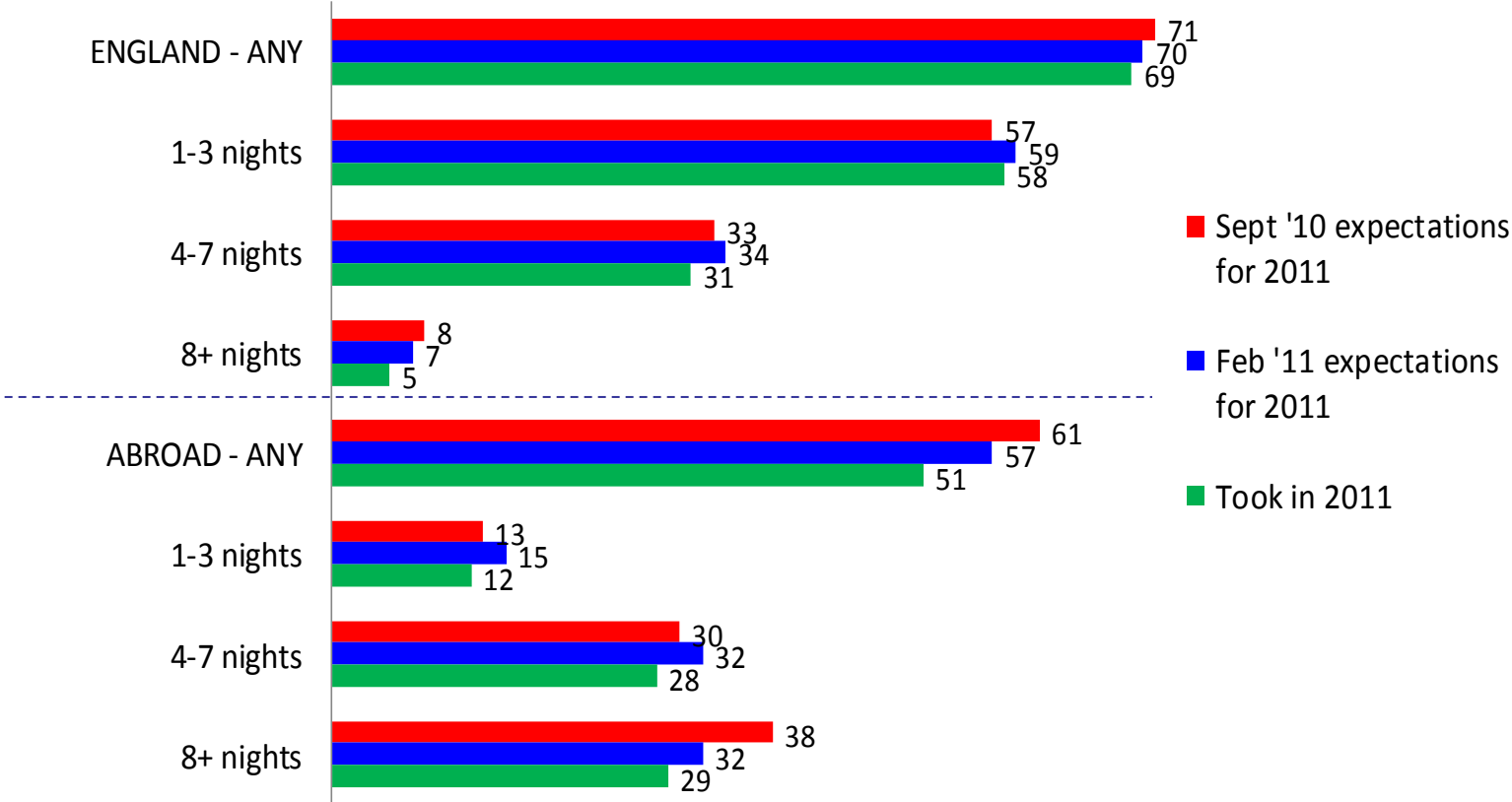


Q7/9d How many of each of these holidays have you taken so far in 2011/will you take before the end of 2011? Q12 How many of these holidays do you think you'll take next year, in 2012? Base: All 1000+



Most optimism has been around the longer holidays abroad

2011 holidays: expectations vs reality (% expecting to take/ having taken)



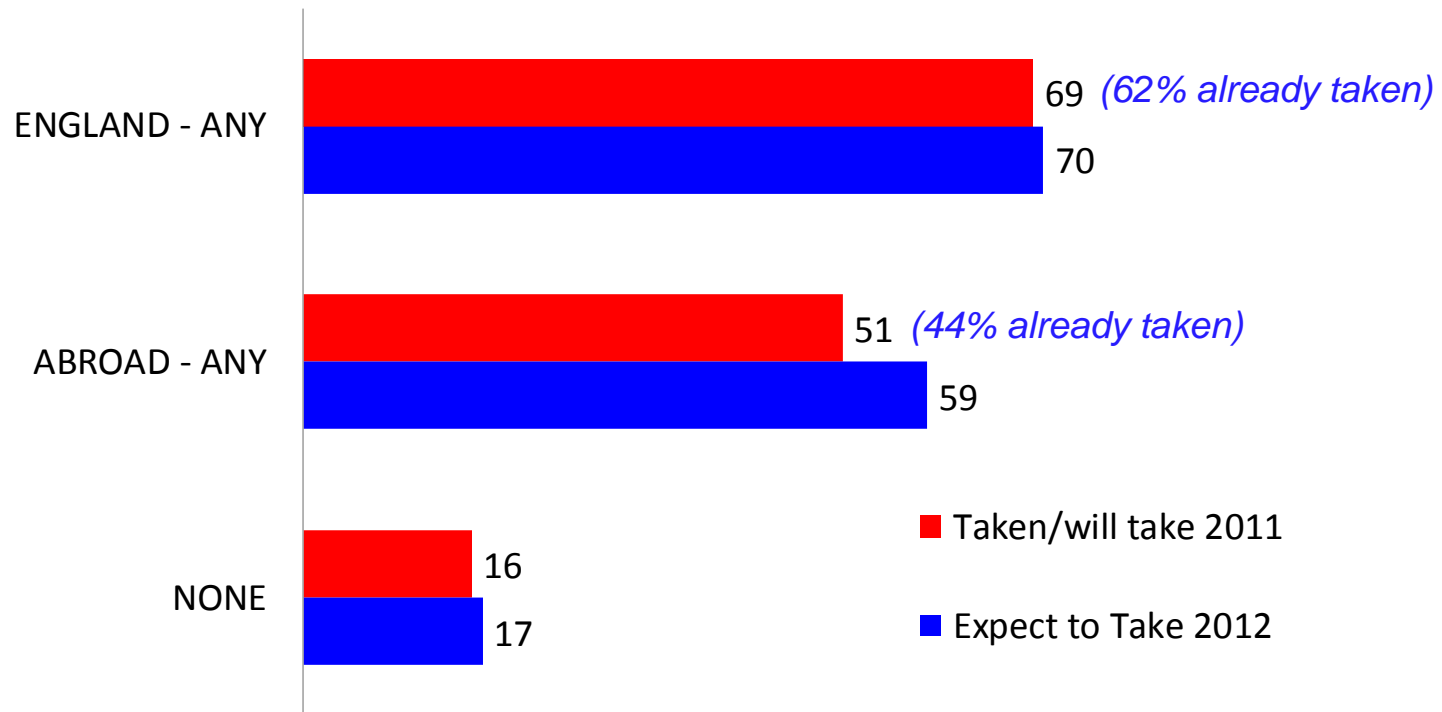
Q7/9d How many of each of these holidays have you taken so far in 2011/will you take before the end of 2011? Q12 How many of each of these holidays do you think you'll take next year, in 2012? Base: All 1000+



Expected increase in taking a holiday abroad next year, not at expense of England hols

- this anticipated increase abroad next year may also prove optimistic, whilst plans re England have tended to be more realistic

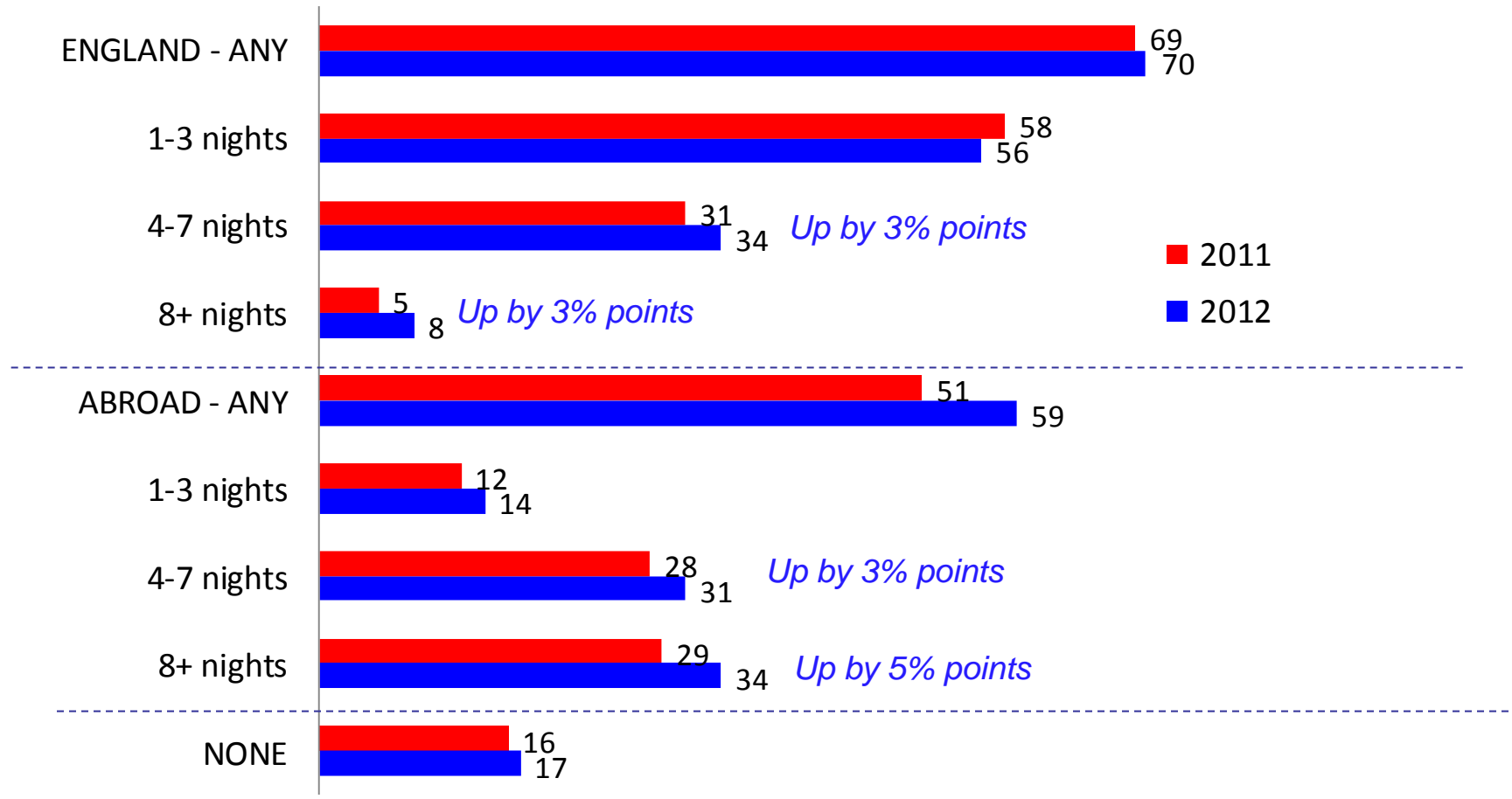
% taken/will take in 2011 / expecting to take holiday type in 2012



Q12 How many of each of these holidays do you think you'll take next year, in 2012? Base: All respondents (1000+)

Anticipated increase in numbers taking mid/long breaks abroad and at home in 2012

% took holiday type in 2011/ expect to take in 2012

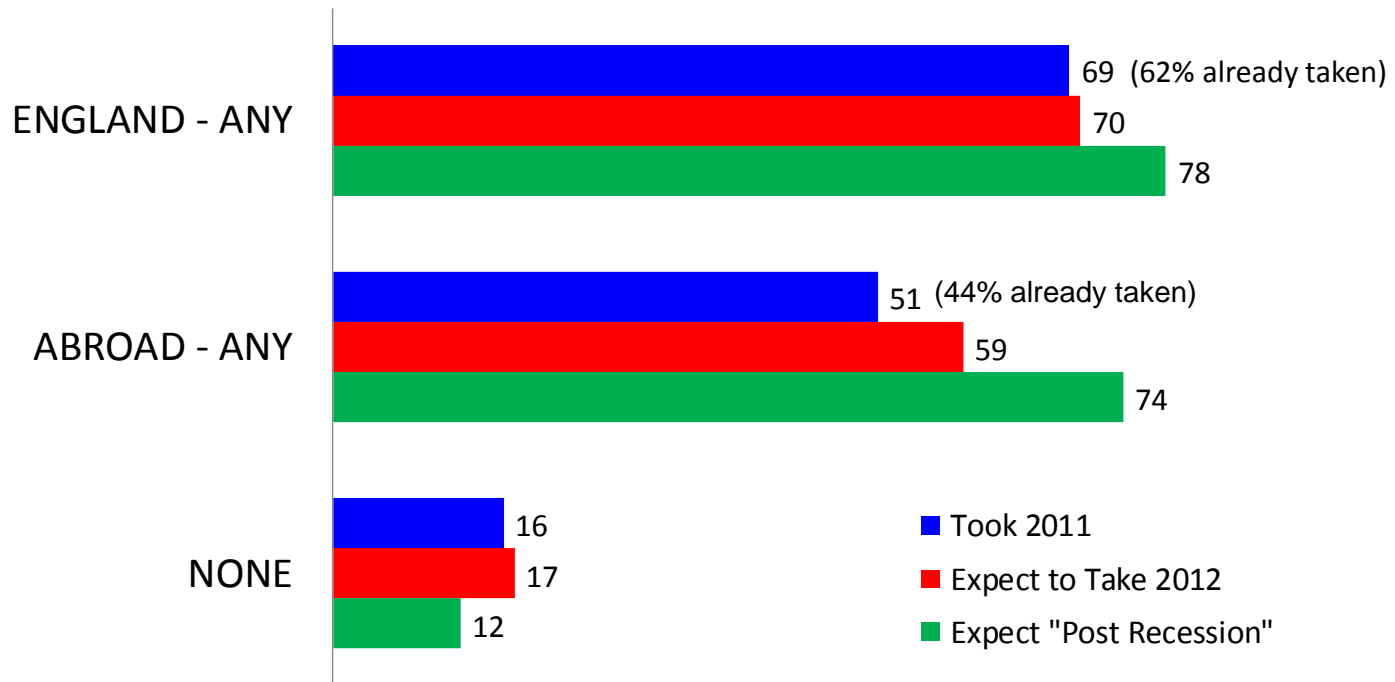


Q7/9d How many of each of these holidays have you taken so far in 2011/will you take before the end of 2011? Q12 How many of each of these holidays do you think you'll take next year, in 2012? Base: All 1000+



Expectations of more holidays both at home but particularly abroad "post recession"

% took hol 2011/ will take 2012 / expect to take "post recession"

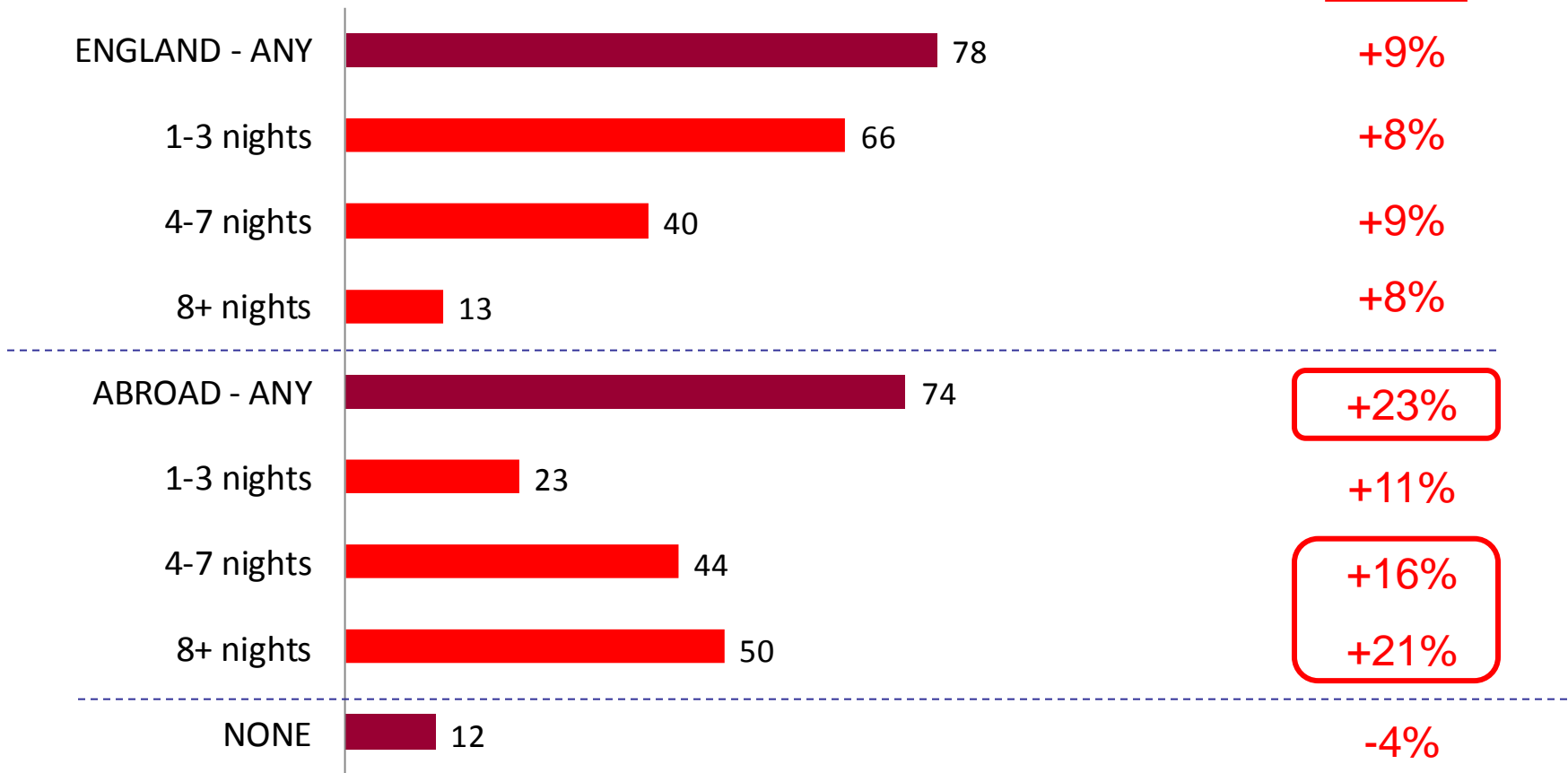


Q7/9d/12/13b How many of each of these holidays have you taken so far in 2011/ do you expect to take between now and the end of 2011/ do you think you'll take next year, in 2012/ do you expect to take in future? Base: All 2011 respondents (1000+)

'Post recession', greater expectation of longer foreign breaks – with mid-length as the real battleground for share of repertoire

% expect to take holiday type in 'stable future'

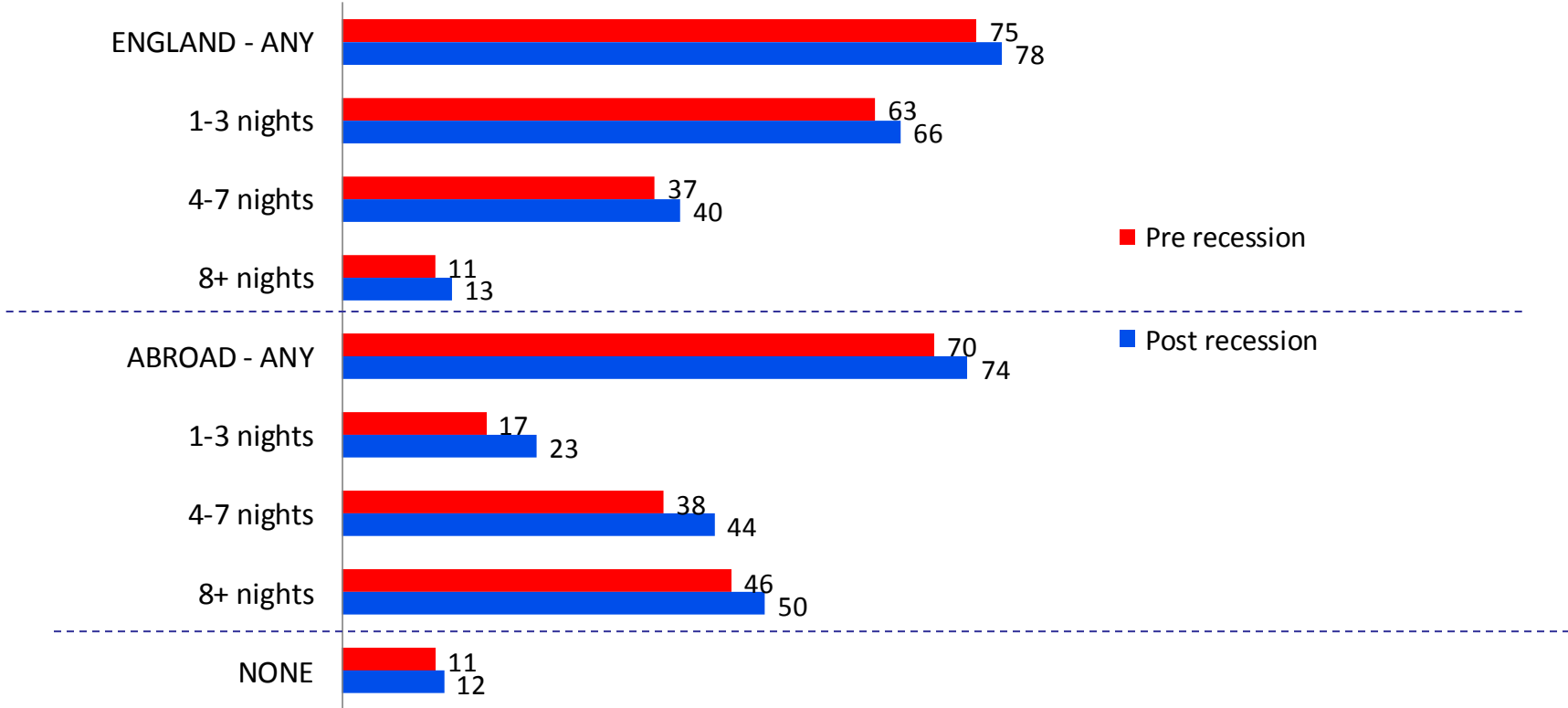
Change from % taken in 2011



Q13b If the economic situation stabilises, how many of each type do you think you'll tend to take in future years? Base: All (1000+)

The post-recession expectation is similar to the recalled holiday pattern pre-recession

% took holiday type Pre-recession/ expect to take Post-recession

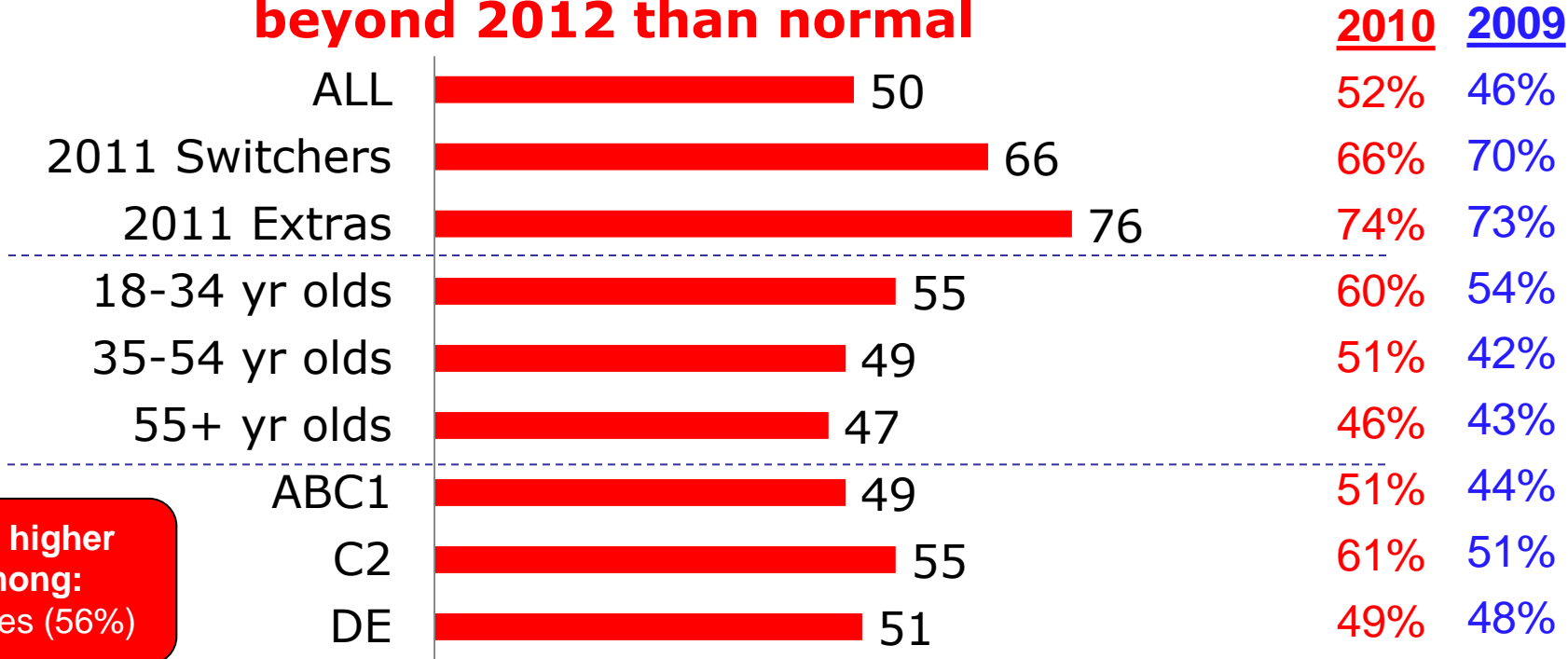


Q13a/13b How many of each type did you normally take per year a couple of years ago, before the recession? And if the economic situation stabilises, how many do you think you'll tend to take in future years? Base: All 1000+

Expectation that more domestic breaks will be taken in future has increased since 2009

- Though this may reflect fears of longer term financial constraints

% likely to take more holiday in England beyond 2012 than normal



**Also higher among:
Families (56%)**

Q14a In future, beyond 2012, do you think you'll continue replacing holidays you normally took abroad with holidays in the UK?

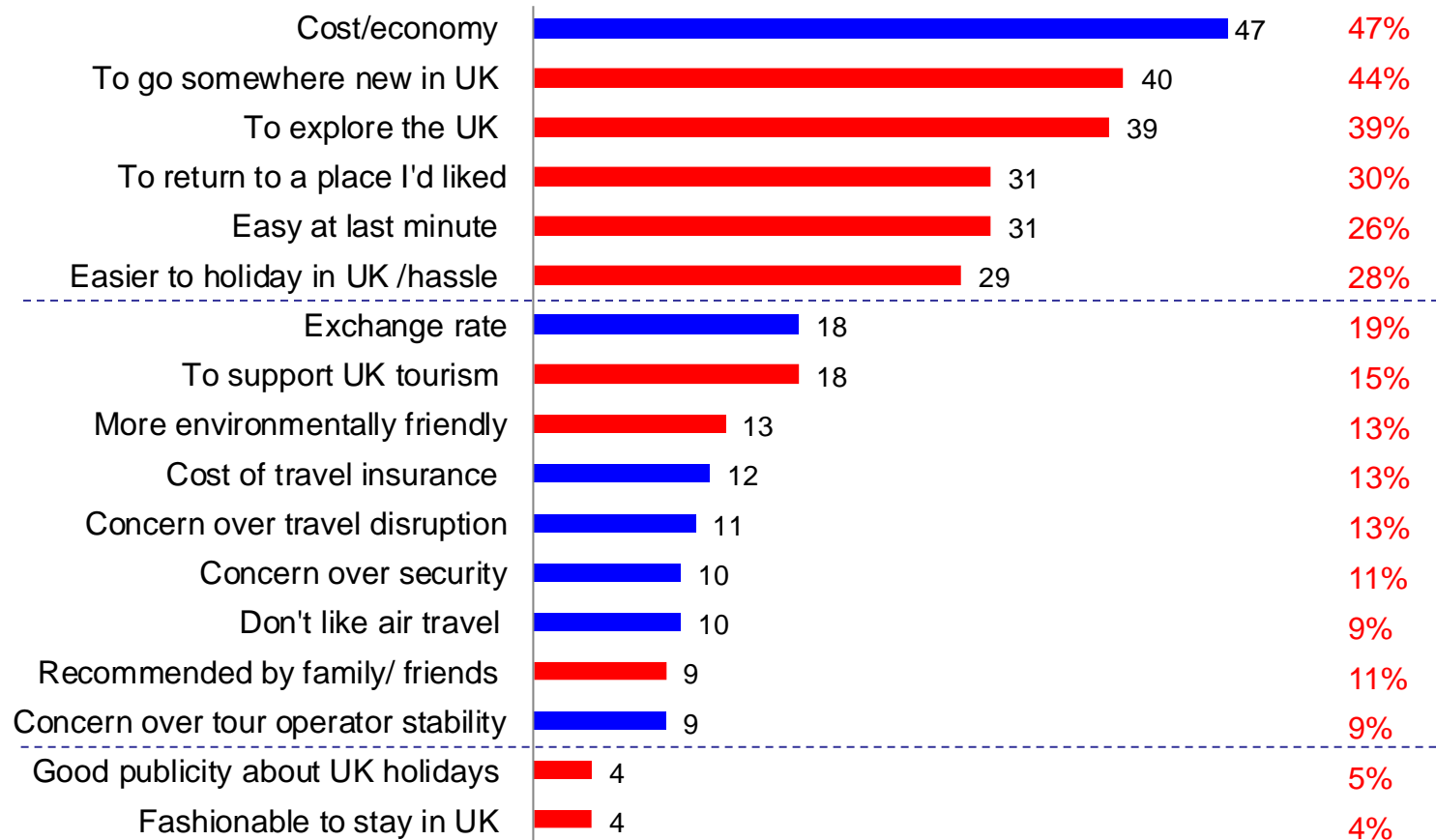
OR In future, beyond 2012, do you think you'll continue to take more holidays in the UK than you used to?

OR In future, beyond 2012, do you think you'll take more of your holidays in the UK than you've normally taken? Base All (1000+)

Reasons are a mix of finance, and positive aspects of domestic breaks

Reasons for being likely to take more UK hol than normal beyond 2012 (%)

2010



Q14B Why are you likely to take more UK hol in future, beyond 2012 than you've normally taken?

Base: Those likely to take more UK hol in future, beyond 2012 than normal (2010=519, 2011 = 499)

CONCLUSIONS

Conclusions

- ❑ Pessimism about the economy, and about consumers' personal financial situation remains high, and the situation is not thought likely to recover soon
 - As in early 2011, few now unconcerned about the personal impact of the economy
- ❑ The Staycation continued in 2011, with 2 in 10 taking a break in England that would otherwise have been abroad
 - Fewer took holidays abroad in 2011 vs 2010
 - particularly longer breaks, with a small increase in mid length England breaks
- ❑ Financial constraints are the MAIN prompt for 'switching', but positive aspects of an England break provide strong supporting reasons, particularly the wish to explore new places with relatively less hassle
 - continued signs that "Extras" are being affected by financial pressures

Conclusions

- ❑ 2012 holidays are expected to be similar to 2011
 - The London Olympics are likely to impact holiday plans for very few
 - half of those attending the Games/events will adjust their holiday plans, mainly benefitting London during the Games, with a corresponding reduction in trips abroad
 - A very small minority of those *not* attending the Games (3%) will flee the country to escape the hype!
 - Some optimism about increased trip taking abroad looks unlikely to be realised, based on previous expectations vs actual behaviour
- ❑ Once through the recession, people hope to reinstate trips abroad to a level similar to that recalled pre-recession
 - Though this is unlikely to be at the expense of the England holiday
 - 18-34 year olds and families in particular are likely to continue taking more holidays in England, in 2012 & beyond
 - Their positive reasons for doing so (exploring new places, in an easy, hassle free way) should be tapped into with communication, to help convert their intent to action

The Staycation: - 2011 and beyond

Autumn 2011

Undertaken for Visit England by

