The Staycation: - 2011 and beyond?

30 March 2011

Undertaken for Visit England by Olive Insight

Visit England
Our Research Aims

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

- How was the 2010 England experience?
- What will happen in 2011?...and beyond?
The Approach

- 1000+ quantitative online interviews

- 28 February – 7 March 2011
  
  *(Middle East troubles had started, pre Earthquake & Tsunami in Japan)*

  *1 week later than 2010 (but comparable as the week immediately after half term)*

- 20 minute questionnaire

- GB population (18yrs +)

- Included key questions on impact of & attitudes towards economic downturn tracked quarterly since Oct 08
We took fewer holidays in 2010 than at any point in the past 5 years

<table>
<thead>
<tr>
<th>Year</th>
<th>England Domestic Holidays 1-3 nights (million)</th>
<th>England Domestic Holidays 4+ nights (million)</th>
<th>UK Residents Overseas Holidays All lengths (million)</th>
<th>All holidays (England domestic + UK outbound) (million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>25.7</td>
<td>14.9</td>
<td>45.3</td>
<td>85.9</td>
</tr>
<tr>
<td>2007</td>
<td>25.8</td>
<td>15.9</td>
<td>45.4</td>
<td>87.1</td>
</tr>
<tr>
<td>2008</td>
<td>25.4</td>
<td>14.7</td>
<td>45.5</td>
<td>85.6</td>
</tr>
<tr>
<td>2009</td>
<td>29.9</td>
<td>17.4</td>
<td>38.5</td>
<td>85.8</td>
</tr>
<tr>
<td>2010</td>
<td>28.1</td>
<td>15.8</td>
<td>36.1</td>
<td>80.0</td>
</tr>
<tr>
<td>09 vs 10</td>
<td>-1.8</td>
<td>-1.6</td>
<td>-2.4</td>
<td>-5.8</td>
</tr>
</tbody>
</table>
THE IN-GOING CLIMATE

Ongoing impact of, & attitudes to the Economic Downturn
Levels of concern over economy & its impact has risen sharply in last few months

% ‘Strongly agree’/ ‘Slightly agree’ with each statement

Most concerned: Women, 35-54 yr olds, C2DEs
No demographic driving increased concern

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

VisitEngland
Over three-quarters now feel the economic situation will get worse before it gets better.

% ‘Strongly agree’/ ‘Slightly agree’ with each statement

Get worse before gets better

UK one of most affected

Fed up with hearing about it

We are over the worst of it

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
Slight rise in level of those actually affected, driven by 35-54 yr old and lower SEG groups

Impact of economic downturn (%)

Most affected:
35-54 yr olds & C2DEs: 1/3 of these groups now seriously affected (was ¼ across 2010)

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

VisitEngland
Almost half now expect their financial situation to get worse 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: How do you think your personal financial situation will change in the coming year?
Base: All respondents (1000+)

More likely among:
18-34 yr olds, singles, those living in London

More likely among:
35+ yr olds, DEs, non workers

Visit England
7 in 10 took a holiday in England in 2010; 3 in 10 taking at least one of 4+ nights

- Longer holidays more likely to be taken abroad

### % took holiday type in 2010

<table>
<thead>
<tr>
<th></th>
<th>ENGLAND - ANY</th>
<th>ABROAD - ANY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1-3 nights</strong></td>
<td>57</td>
<td>14</td>
</tr>
<tr>
<td><strong>4-7 nights</strong></td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td><strong>8+ nights</strong></td>
<td>7</td>
<td>34</td>
</tr>
</tbody>
</table>

- **ENGLAND - ANY**
  - 69% took a holiday in 2010
  - Higher among 18-34 yr olds

- **ABROAD - ANY**
  - 55% took a holiday in 2010
  - Higher among couples without kids, and those in London and South East
  - Higher among DEs and Singles (both c.25%)

Q7 How many of each of these holidays did you take in 2010? Base: All 2010 respondents (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 – in most cases, without giving up holidays abroad
- Together, these groups drove the uplift in domestic holidays in 2009 and 2010
Since 2009, the number of Switchers has increased – but more of them are reducing their overall number of UK breaks.

% Staycationer Types 2009 - 2010

2009
- Switcher / Less UK Hol: 6
- Switcher / Same UK Hol: 4
- Switcher AND Extra: 3
- Extra Only: 12
- Total: 25%

2010
- Switcher / Less UK Hol: 9
- Switcher / Same UK Hol: 5
- Switcher AND Extra: 5
- Extra Only: 9
- Total: 28%
Extras now less protected from impact of downturn

% Agreement with Statements About Economy

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Switchers</th>
<th>Extras</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very concerned</td>
<td>61</td>
<td>75</td>
<td>56</td>
</tr>
<tr>
<td>Worried about making</td>
<td>54</td>
<td>65</td>
<td>46</td>
</tr>
</tbody>
</table>
Extras now less protected from impact of downturn

% Agreement with Statements About Economy

<table>
<thead>
<tr>
<th>Year</th>
<th>Very concerned</th>
<th>Worried about making ends meet</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>61</td>
<td>56</td>
</tr>
<tr>
<td>2010</td>
<td>74</td>
<td>74</td>
</tr>
</tbody>
</table>

VisitEngland
Economy is the most frequent reason for “switching” (but not the only one)

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit crunch/ finances</td>
<td>64</td>
</tr>
<tr>
<td>To go somewhere new in UK</td>
<td>30</td>
</tr>
<tr>
<td>Easy to do at the last minute</td>
<td>25</td>
</tr>
<tr>
<td>Easier /Hassle to go abroad</td>
<td>24</td>
</tr>
<tr>
<td>To return to a place I liked</td>
<td>24</td>
</tr>
<tr>
<td>Concern over flight/travel disruption</td>
<td>23</td>
</tr>
<tr>
<td>To explore the UK</td>
<td>22</td>
</tr>
<tr>
<td>Exchange rate</td>
<td>19</td>
</tr>
<tr>
<td>To support UK tourism</td>
<td>16</td>
</tr>
<tr>
<td>Recommended by family/friends</td>
<td>14</td>
</tr>
</tbody>
</table>

Base: Those taking hol in England that would normally have been taken abroad (2010=177)
Exchange rate less prominent – but motivations otherwise very similar to 2009

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

- Credit crunch/ finances: 64% (2010) vs. 62% (2009)
- To go somewhere new in UK: 26% (2010) vs. 26% (2009)
- Easy to do at the last minute: 25% (2010) vs. 25% (2009)
- Easier /Hassle to go abroad: 24% (2010) vs. 24% (2009)
- To return to a place I liked: 22% (2010) vs. 28% (2009)
- To explore the UK: 26% (2010) vs. 26% (2009)
- Exchange rate: 19% (2010) vs. 33% (2009)
- To support UK tourism: 16% (2010) vs. 10% (2009)
- Recommended by family/ friends: 14% (2010) vs. 10% (2009)

Base: Those taking hol in England that would normally have been taken abroad (2009= 134, 2010=177)
Extras are driven much more by positive motivations

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

- To return to a place I liked: 37
- To go somewhere new in UK: 36
- To explore the UK: 34
- Credit crunch/economy: 28
- Easy to do at the last minute: 22
- Easier/Hassle to go abroad: 19
- Exchange rate: 14
- Recommended by family/friends: 12
- More environmentally friendly: 10

Base: Those taking more hol in England but not having switched from a holiday abroad (2009=124, 2010=87)
BUT 2010 Extras more likely than 2009 Extras to have holidayed at home for financial reasons

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

To return to a place I liked  38  37
To go somewhere new in UK  39  36
To explore the UK  43  34
Credit crunch/ economy  28  15
Easy to do at the last minute  28  22
Easier /Hassle to go abroad  26  19
Exchange rate  14  6
Recommended by family/ friends  24  12
More environmentally friendly  10  8

Base: Those taking more hol in England but not having switched from a holiday abroad (2009= 124 , 2010= 87)
THE 2010 EXPERIENCE

- How was the experience?

- How will this impact on 2011 plans...and beyond?
England holidays continue to deliver a great experience

Rating of England holiday taken on: (%)

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Very Good</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for Money</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>Quality of Accommodation</td>
<td>34</td>
<td>40</td>
</tr>
<tr>
<td>Overall experience</td>
<td>37</td>
<td>47</td>
</tr>
</tbody>
</table>

Seaside, small town and country better than large town/city

B&B and camping perform less well than others

8+ nights deliver best experience

Q19. How would you rate this holiday/ break on ……? (Excellent, Very good, Satisfactory, Poor, Very poor)
Weather perceptions similar in 2010 and 2009

Weather on Holiday

- 2010 holiday
- 2009 holiday

Good
- 36% (2010)
- 39% (2009)

Mixed
- 55% (2010)
- 50% (2009)

Poor
- 9% (2010)
- 10% (2009)

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

Holiday Experience

- % Excellent/Very Good
  - 2010: 91%
  - 2009: 82%
  - Average: 61%
Although 7 in 10 Switchers missed taking a holiday abroad, most felt it was a nice change.

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Slightly agree</th>
<th>Neither</th>
<th>Slightly disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I missed taking a holiday abroad</td>
<td>27</td>
<td>41</td>
<td>16</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>I'm glad I took it in England rather than abroad</td>
<td>22</td>
<td>34</td>
<td>27</td>
<td>13</td>
<td>4</td>
</tr>
<tr>
<td>It felt like a nice change</td>
<td>15</td>
<td>52</td>
<td>21</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>I was very disappointed to have to take it in England</td>
<td>10</td>
<td>22</td>
<td>21</td>
<td>25</td>
<td>22</td>
</tr>
</tbody>
</table>

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 - asked in Sept ’10, 2010: 177)
6 in 10 Switchers want to take more holiday in England as a result of holidaying here

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

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

- **Strongly agree**
- **Slightly agree**
- **Neither**
- **Slightly disagree**
- **Strongly disagree**

**It made me want to take a holiday abroad next time**
- 18%
- 31%
- 28%
- 14%
- 9%

**It made me want to take more holidays in England**
- 17%
- 44%
- 27%
- 8%
- 4%

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 -asked in Sept '10, 2010: 177)
The consumer doesn’t necessarily see domestic and overseas breaks as mutually exclusive!

<table>
<thead>
<tr>
<th></th>
<th>All Switchers</th>
<th>Switchers Agreeing “I missed taking a holiday abroad”</th>
<th>Switchers agreeing “It felt like a nice change”</th>
</tr>
</thead>
<tbody>
<tr>
<td>It made me want to take a holiday abroad next time</td>
<td>49%</td>
<td>66%</td>
<td>43%</td>
</tr>
<tr>
<td>It made me want to take more holidays in England</td>
<td>61%</td>
<td>54%</td>
<td>76%</td>
</tr>
</tbody>
</table>
Discovering *new* places in England is key, and half feel pride in holidaying at home

**Attitudes to taking a holiday in England (%)**

- I love discovering new places in England
  - Strongly agree: 32%
  - Slightly agree: 40%
  - Neither: 21%
  - Slightly disagree: 4%
  - Strongly disagree: 0%
  - Total: 72%

- On Eng hols love going back to favourite places
  - Strongly agree: 15%
  - Slightly agree: 38%
  - Neither: 30%
  - Slightly disagree: 10%
  - Strongly disagree: 4%
  - Total: 53%

- Taking Eng hols makes me feel proud of what it has to offer
  - Strongly agree: 17%
  - Slightly agree: 32%
  - Neither: 36%
  - Slightly disagree: 7%
  - Strongly disagree: 5%
  - Total: 50%

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 are less hassle – but value is still a concern

### Attitudes to taking a holiday in England (%)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Slightly agree</th>
<th>Neither</th>
<th>Slightly disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eng holis just as enjoyable as abroad</td>
<td>19</td>
<td>28</td>
<td>27</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>Eng holis MORE enjoyable than abroad</td>
<td>8</td>
<td>13</td>
<td>41</td>
<td>22</td>
<td>13</td>
</tr>
<tr>
<td>Eng holis better value than abroad</td>
<td>7</td>
<td>19</td>
<td>34</td>
<td>21</td>
<td>15</td>
</tr>
<tr>
<td>Eng holis less hassle than abroad</td>
<td>24</td>
<td>38</td>
<td>21</td>
<td>10</td>
<td>5</td>
</tr>
</tbody>
</table>

Q10a To what extent do you personally agree or disagree with the following statements about taking a holiday in England? Base: All
2011 AND BEYOND

- What holidays are people expecting (hoping?) to take in 2011?

- Hopes for holidays in a stable economic climate
2011 patterns expected to be similar to 2010

% took 2010 / expecting to take holiday type in 2011

- **ENGLAND - ANY**
  - Took 2010: 69%
  - Expect to Take 2011: 70%

- **ABROAD - ANY**
  - Took 2010: 55%
  - Expect to Take 2011: 57%

- **NONE**
  - Took 2010: 15%
  - Expect to Take 2011: 15%

Q12 How many of each of these holidays do you think you’ll take this year, in 2011? Base: All 2010 respondents (1000+)
Less optimism now than in early 2010 – especially about overseas breaks

% expecting to take holiday type in 2011

Q12 How many of each of these holidays do you think you’ll take this year, in 2011? Base: All 2010 respondents (1000+)
Some evidence of earlier booking this year – and opportunity to convert the 1 in 4 who “haven’t thought about it yet”

Booking Expectations early 2010 vs early 2011

**England Holiday**

<table>
<thead>
<tr>
<th></th>
<th>Feb/Mar 2010</th>
<th>Feb/Mar 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already Booked</td>
<td>21</td>
<td>28</td>
</tr>
<tr>
<td>Likely, Not booked</td>
<td>36</td>
<td>30</td>
</tr>
<tr>
<td>Unlikely</td>
<td>21</td>
<td>18</td>
</tr>
<tr>
<td>Haven't thought</td>
<td>22</td>
<td>24</td>
</tr>
</tbody>
</table>

**Holiday Abroad**

<table>
<thead>
<tr>
<th></th>
<th>Feb/Mar 2010</th>
<th>Feb/Mar 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already Booked</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>Likely, Not booked</td>
<td>30</td>
<td>24</td>
</tr>
<tr>
<td>Unlikely</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>Haven't thought</td>
<td>13</td>
<td>15</td>
</tr>
</tbody>
</table>

- Already Booked
- Likely, Not booked
- Unlikely
- Haven't thought
Expectation that more domestic breaks will be taken in future has \textbf{increased} since 2009

- Though this may reflect fears of longer term financial constraints

<table>
<thead>
<tr>
<th>% likely to take more holiday in UK beyond 2011 than normal</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>46% (+6%)</td>
</tr>
<tr>
<td>2010 Switchers</td>
<td>70% (-4%)</td>
</tr>
<tr>
<td>2010 Extras</td>
<td>73% (+1%)</td>
</tr>
<tr>
<td>18-34 yr olds</td>
<td>54% (+6%)</td>
</tr>
<tr>
<td>35-54 yr olds</td>
<td>42% (+9%)</td>
</tr>
<tr>
<td>55+ yr olds</td>
<td>43% (+3%)</td>
</tr>
<tr>
<td>ABC1</td>
<td>44% (+7%)</td>
</tr>
<tr>
<td>C2</td>
<td>51% (+10%)</td>
</tr>
<tr>
<td>DE</td>
<td>48% (+1%)</td>
</tr>
</tbody>
</table>

\textbf{Also higher among:}
- Families (60%)
- Public Sector workers (66%)

Q14a In future, beyond 2011, do you think you’ll continue replacing holidays you normally took abroad with holidays in the UK?

\textbf{OR} In future, beyond 2011, do you think you’ll continue to take more holidays in the UK than you used to?

\textbf{OR} In future, beyond 2011, 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 2011 (%)

- **Cost/economy**: 47%
- **To go somewhere new in UK**: 44%
- **To explore the UK**: 39%
- **To return to a place I'd liked**: 30%
- **Easier to holiday in UK /hassle**: 28%
- **Easy at last minute**: 26%
- **Exchange rate**: 19%
- **To support UK tourism**: 15%
- **Cost of travel insurance**: 13%
- **More environmentally friendly**: 13%
- **Concern over travel disruption**: 13%
- **Recommended by family/ friends**: 11%
- **Concern over security**: 11%
- **Don't like air travel**: 9%
- **Concern over tour operator stability**: 9%
- **Good publicity about UK holidays**: 5%
- **Fashionable to stay in UK**: 4%

Q14B Why are you likely to take more UK hol in future, beyond 2011 than you've normally taken?
Base: Those likely to take more UK hol in future, beyond 2011 than normally taken( 2010=519)
Expectations of more foreign holidays “post recession” – but not at the expense of England breaks

% took hol 2010/will take 2011/expect to take “post recession”

Q12 How many of each of these holidays do you think you’ll take this year, in 2011? Base: All 2010 respondents (1000+)
‘Post recession’, greater expectation of longer foreign breaks – with mid-length as the real battleground for share of repertoire

<table>
<thead>
<tr>
<th>Holiday Type</th>
<th>Expected %</th>
<th>Change from % in 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENGLAND - ANY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-3 nights</td>
<td>67</td>
<td>+10%</td>
</tr>
<tr>
<td>4-7 nights</td>
<td>42</td>
<td>+14%</td>
</tr>
<tr>
<td>8+ nights</td>
<td>14</td>
<td>+7%</td>
</tr>
<tr>
<td>ABROAD - ANY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-3 nights</td>
<td>26</td>
<td>+12%</td>
</tr>
<tr>
<td>4-7 nights</td>
<td>46</td>
<td>+20%</td>
</tr>
<tr>
<td>8+ nights</td>
<td>50</td>
<td>+16%</td>
</tr>
<tr>
<td>NONE</td>
<td>10</td>
<td>-5%</td>
</tr>
</tbody>
</table>
Aspiration to visit other UK nations “post recession” (comms driven?) is both an opportunity and a threat.
Beyond 2011, expectation of more 1-7 night England breaks – but fewer 8+ nights

- 18-34 yr olds, ABs and families more likely to take more of each type

Q15a. Beyond 2011, how will the number of breaks you take within England change compared to the number you normally tended to take a couple of years ago, before the credit crunch? Base: All (1000)
**Increased short breaks will be incremental, longer (4+) nights will replace overseas trips**

- 18-34 yr olds, ABs and families more likely to take more of each type

**Expected change in breaks within England beyond 2011 vs pre credit crunch (%)**

<table>
<thead>
<tr>
<th>1-3 nights</th>
<th>Definitely More</th>
<th>Probably more</th>
<th>Same</th>
<th>Probably less</th>
<th>Definitely less</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>20</td>
<td>46</td>
<td>5</td>
<td>5</td>
<td>14</td>
<td></td>
</tr>
</tbody>
</table>

46% in addition to trips normally taken
37% instead of trips abroad
17% instead of longer trips to England

<table>
<thead>
<tr>
<th>4-7 nights</th>
<th>Definitely More</th>
<th>Probably more</th>
<th>Same</th>
<th>Probably less</th>
<th>Definitely less</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>14</td>
<td>49</td>
<td>6</td>
<td>6</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

53% instead of trips abroad
20% in addition to trips normally taken
17% instead of shorter trips to England
10% instead of longer trips to England

<table>
<thead>
<tr>
<th>8+ nights</th>
<th>Definitely More</th>
<th>Probably more</th>
<th>Same</th>
<th>Probably less</th>
<th>Definitely less</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>6</td>
<td>50</td>
<td>6</td>
<td>8</td>
<td>26</td>
<td></td>
</tr>
</tbody>
</table>

64% instead of trips abroad
19% instead of shorter trips to England
18% in addition to trips normally taken

Q15a. Beyond 2011, how will the number of breaks you take within England change compared to the number you normally tended to take a couple of years ago, before the credit crunch? Base: All (1000)
**Anticipated future reduction in England trips generally due to decreased holiday taking rather than switching overseas**

### Expected change in breaks within England beyond 2011 vs pre credit crunch (%)

<table>
<thead>
<tr>
<th>Break Length</th>
<th>Definitely More</th>
<th>Probably more</th>
<th>Same</th>
<th>Probably less</th>
<th>Definitely less</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3 nights</td>
<td>10</td>
<td>20</td>
<td>46</td>
<td>5</td>
<td>5</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>46% in addition to trips normally taken</td>
<td></td>
<td></td>
<td>72% taking less holiday overall</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>37% instead of trips abroad</td>
<td></td>
<td></td>
<td>17% will take more trips abroad instead</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>17% instead of longer trips to England</td>
<td></td>
<td></td>
<td>12% will take longer trips in England instead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4-7 nights</td>
<td>5</td>
<td>14</td>
<td>49</td>
<td>6</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>53% instead of trips abroad</td>
<td></td>
<td></td>
<td>61% taking less holiday overall</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>20% in addition to trips normally taken</td>
<td></td>
<td></td>
<td>20% will take more shorter trips in England</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>17% instead of shorter trips to England</td>
<td></td>
<td></td>
<td>18% will take more trips abroad instead</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10% instead of longer trips to England</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8+ nights</td>
<td>4</td>
<td>6</td>
<td>50</td>
<td>6</td>
<td>8</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>64% instead of trips abroad</td>
<td></td>
<td></td>
<td>59% taking less holiday overall</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>19% instead of shorter trips to England</td>
<td></td>
<td></td>
<td>22% will take more shorter trips in England</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>18% in addition to trips normally taken</td>
<td></td>
<td></td>
<td>19% will take more trips abroad instead</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q15a. Beyond 2011, how will the number of breaks you take within England change compared to the number you normally tended to take a couple of years ago, before the credit crunch? Base: All (1000)
CONCLUSIONS
Conclusions

- Pessimism about the economy, and about consumers’ personal financial situation, has increased sharply over the past 6 months
  - Degree to which fears are realised is bound to impact 2011 behaviour

- The Staycation continued in 2010, with 2 in 10 taking a break in England that would otherwise have been abroad
  - Mainly due to financial reasons, but also for positive appeal of an England break
  - Signs that “Extras” are being affected by financial pressures

- 2011 holidays are expected to be similar to 2010
  - Less optimism about increased trip taking than at the same time last year

- Once through the recession, people hope to reinstate trips abroad
  - Though this is unlikely to be at the expense of the England holiday, also expected to increase
  - 4-7 night trips likely to be a key battleground for share of repertoire

- 18-34 year olds and families in particular are likely to continue taking more holidays in England, in 2011 & 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
  - Value perceptions still a challenge
THE ROYAL WEDDING!

Who will be watching it?

What will people do over the long bank holiday weekend?
Twice as many likely to travel in UK over the bank holiday weekend as to go abroad

Which most likely to do over long Bank holiday weekend (%)

- Stay at home: 57%
- Don't know yet: 24%
- Travel somewhere in the UK: 15% (No demographic differences)
- Travel abroad: 6% (Higher among 18-34 yr olds (9%) and those living in London (10%)

Q27. There will be an additional Bank Holiday this year on 29th April to help celebrate the wedding of Prince William and Kate Middleton which takes place that day. The May Day Bank Holiday on the following Monday, 2nd May, makes this a long bank holiday weekend. Which are you most likely to do on that extra Bank Holiday Weekend?? Base All (1000+)
8 in 10 travelling in UK will do so in England

Where plan to travel in UK over long Bank holiday weekend (%)

- England: 79%
- Scotland: 16%
- Wales: 14%
- Northern Ireland: 3%
- Don't know yet: 6%

Higher among those living there (bases too low to show %)

Q28. Where do you plan to travel in the UK?
Base: Those planning to travel in UK over the weekend (150)
c. 4 in 10 likely to watch the wedding, higher among women (53%) than men (33%)
Most will watch the Royal Wedding at home

- Only those living in London are likely to go to watch it first hand

<table>
<thead>
<tr>
<th>Where likely to watch Royal Wedding (%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>On TV at home</td>
<td>72</td>
</tr>
<tr>
<td>At a friend/family's house</td>
<td>9</td>
</tr>
<tr>
<td>In London, 1st hand</td>
<td>5</td>
</tr>
<tr>
<td>Somewhere else</td>
<td>4</td>
</tr>
<tr>
<td>In the pub</td>
<td>4</td>
</tr>
<tr>
<td>Don't know yet</td>
<td>5</td>
</tr>
</tbody>
</table>

Q30. Where is the main place you expect to watch the Royal Wedding?
Base Those who expect to watch the Royal Wedding (434)

19% among those living in London, 5% among those living in South East
Most will watch the Royal Wedding with their partner/family

<table>
<thead>
<tr>
<th>Who likely to watch Royal Wedding with (%)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>With partner/spouse</td>
<td>46</td>
</tr>
<tr>
<td>With family</td>
<td>34</td>
</tr>
<tr>
<td>No one (by myself)</td>
<td>14</td>
</tr>
<tr>
<td>With friend(s)</td>
<td>14</td>
</tr>
<tr>
<td>With work colleague(s)</td>
<td>1</td>
</tr>
<tr>
<td>Don't know yet</td>
<td>6</td>
</tr>
</tbody>
</table>

Q31. Who do you think you'll be watching it with?  
Base Those who expect to watch the Royal Wedding (434)
### Shopping, a day out, to the country/beach most likely activities over the long weekend

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go shopping</td>
<td>23%</td>
</tr>
<tr>
<td>Go for a general day out</td>
<td>19%</td>
</tr>
<tr>
<td>Explore the countryside</td>
<td>18%</td>
</tr>
<tr>
<td>Go to the beach / seaside</td>
<td>16%</td>
</tr>
<tr>
<td>Outdoor leisure pursuits</td>
<td>15%</td>
</tr>
<tr>
<td>Visit a garden</td>
<td>12%</td>
</tr>
<tr>
<td>Visit a castle/home/historic site</td>
<td>11%</td>
</tr>
<tr>
<td>Attend an entertainment</td>
<td>10%</td>
</tr>
<tr>
<td>Explore a small town</td>
<td>9%</td>
</tr>
<tr>
<td>Watch a sporting event</td>
<td>8%</td>
</tr>
<tr>
<td>Go to a zoo/aquarium/sea life centre</td>
<td>7%</td>
</tr>
<tr>
<td>Visit a theme park/funfair</td>
<td>7%</td>
</tr>
<tr>
<td>Visit a museum or art gallery</td>
<td>6%</td>
</tr>
<tr>
<td>Explore a large town / city</td>
<td>6%</td>
</tr>
<tr>
<td>Go on a guided tour</td>
<td>1%</td>
</tr>
<tr>
<td>None of these</td>
<td>12%</td>
</tr>
<tr>
<td>Don't know yet</td>
<td>30%</td>
</tr>
</tbody>
</table>

Q32. And over the Bank Holiday weekend, which of the following do you expect to do? Even if you are not sure of your plans please select those you are most likely to do,  Base All (1000)