

# The Staycation: - 2012, the Olympic Games, and beyond

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Undertaken for Visit England by



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# Our Research Aims

To provide a clear indication of the future of the uplift  
in domestic travel seen since the economic downturn  
...THE STAYCATION

*-How was the 2011 England experience?*

*-What will happen in 2012 and beyond?*

*-and how will the London Olympics impact on this?*

# The Approach

- 1000+ quantitative online interviews
  - 20-26 February 2012
  - 20 minute questionnaire
  - GB population (18yrs +)
- Included key questions on impact of & attitudes towards economic downturn tracked quarterly since Oct 08

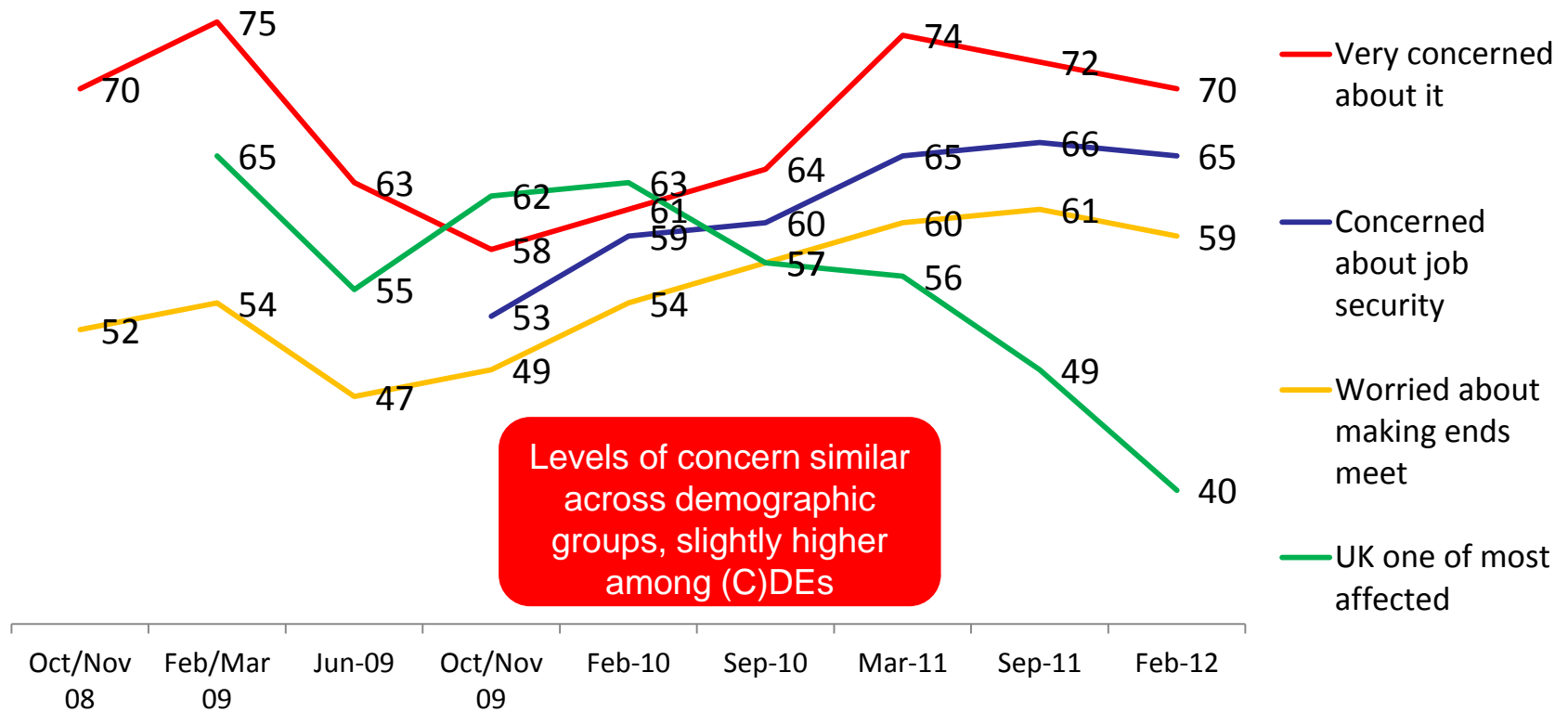
# THE IN-GOING CLIMATE

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

# The rising levels of concern over the economy during 2011 look to have peaked

- and increasing acknowledgement that others more affected than UK

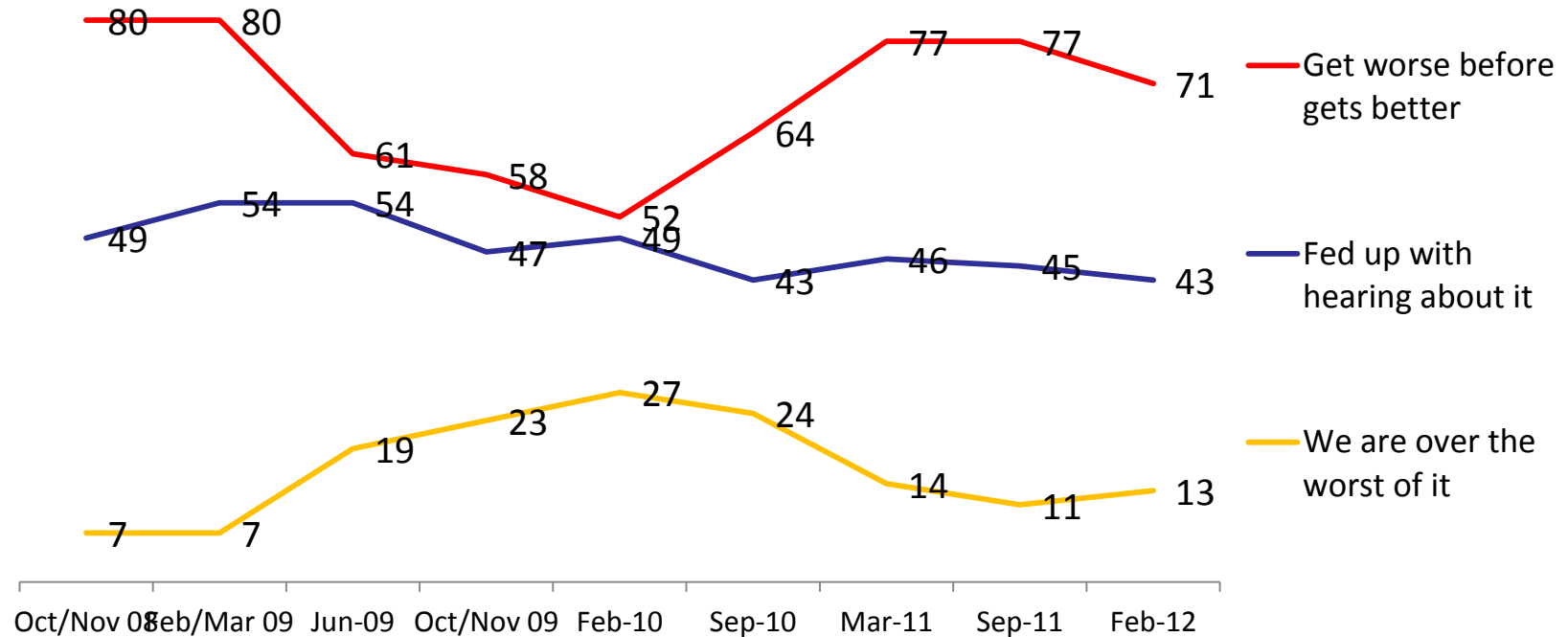
## % 'Strongly agree'/'Slightly agree' with each statement



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)

# Most (7 in 10) still feel things will worsen before getting better

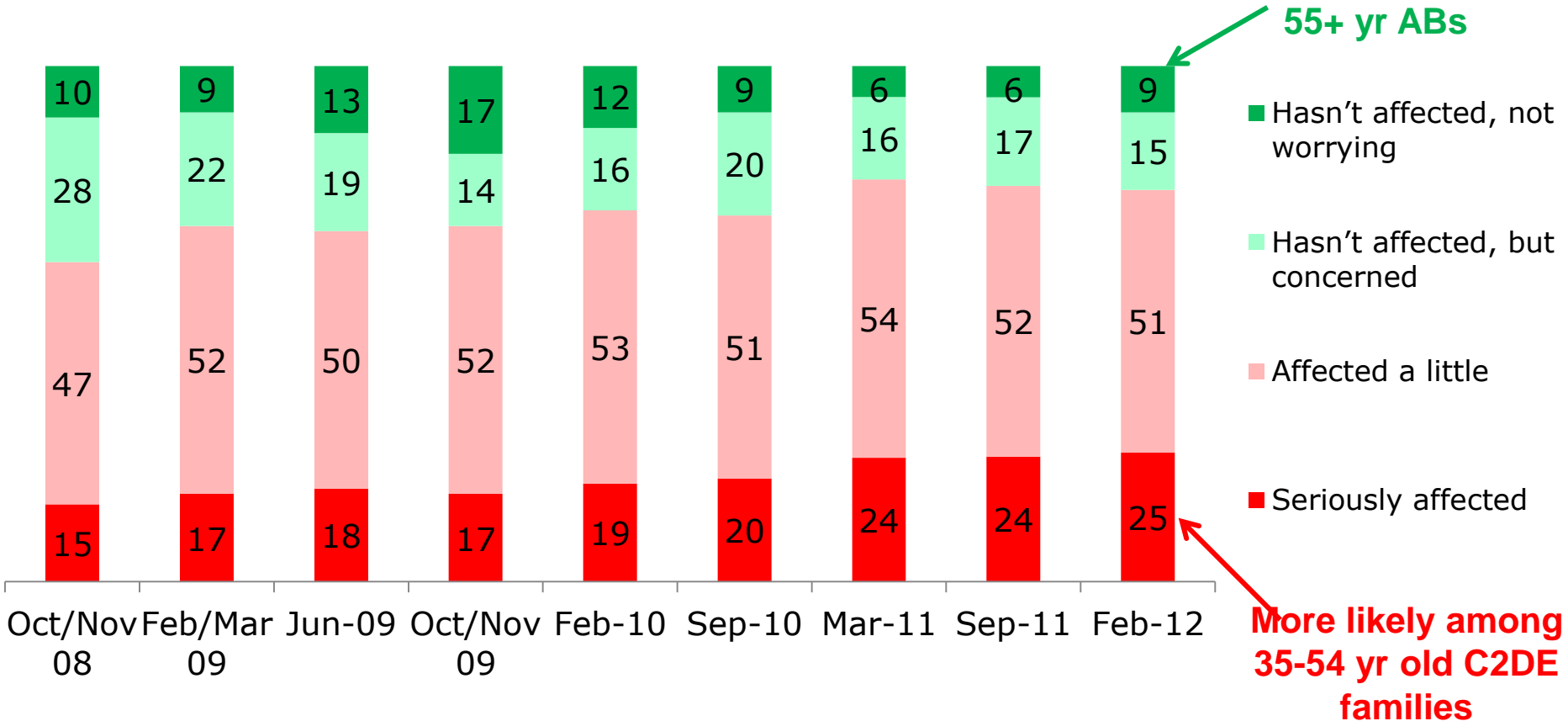
## % 'Strongly agree'/'Slightly agree' with each statement



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)

# Constant 3/4 affected by the downturn. The unaffected now slightly less concerned

Impact of economic downturn (%)

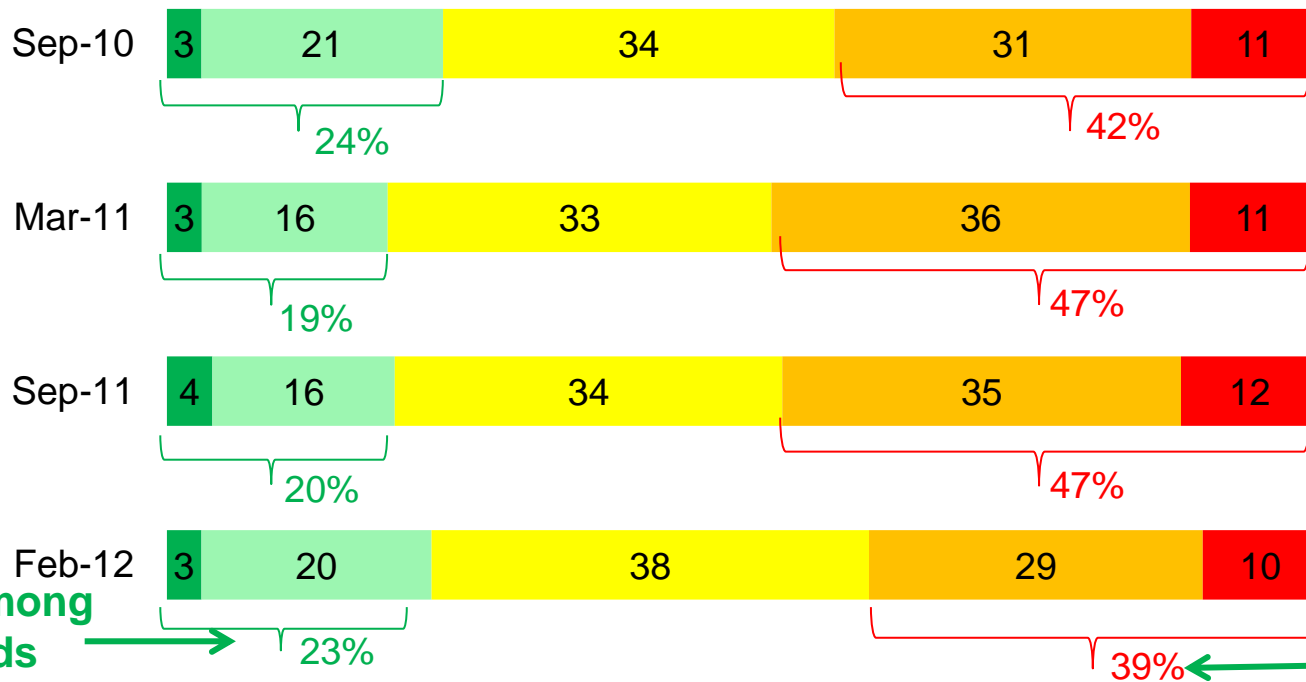


Q2. Which of the following best describes your feelings about the economic downturn or credit crunch?  
 Base: All respondents (1000+) Differences of c 5% are significant

# Slightly more now expect their financial situation to improve 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



More likely among  
18-34 yr olds  
without families

More likely among older  
unemployed  
people

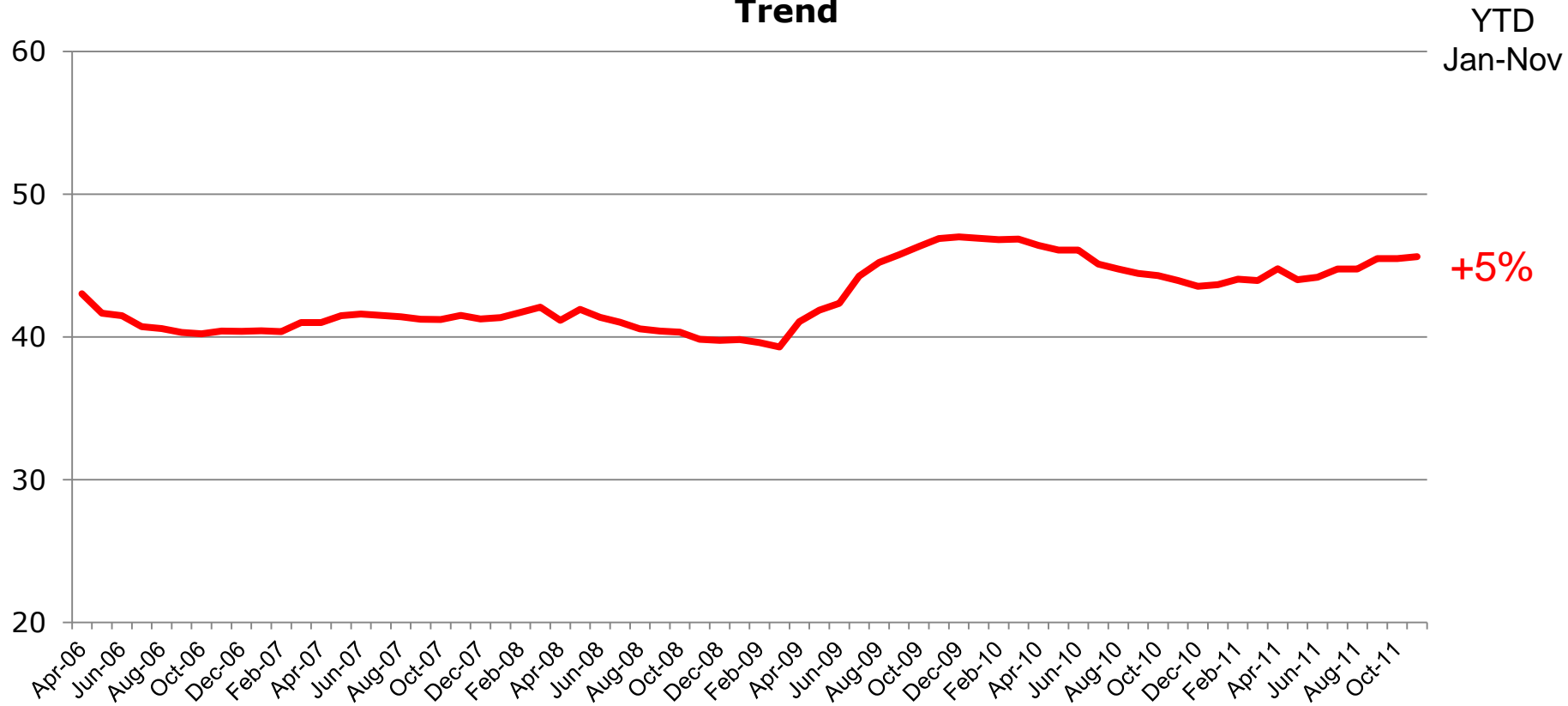
Q2b: How do you think your personal financial situation will change in the coming year? Base: All (1000+)



# THE 2011 HOLIDAY

# 2011 holiday volumes are below 2009 peak, but remain well above pre-recession levels

## Domestic Overnight Holiday Trips in England – Rolling 12 Month Trend



Source: GB Tourism Survey

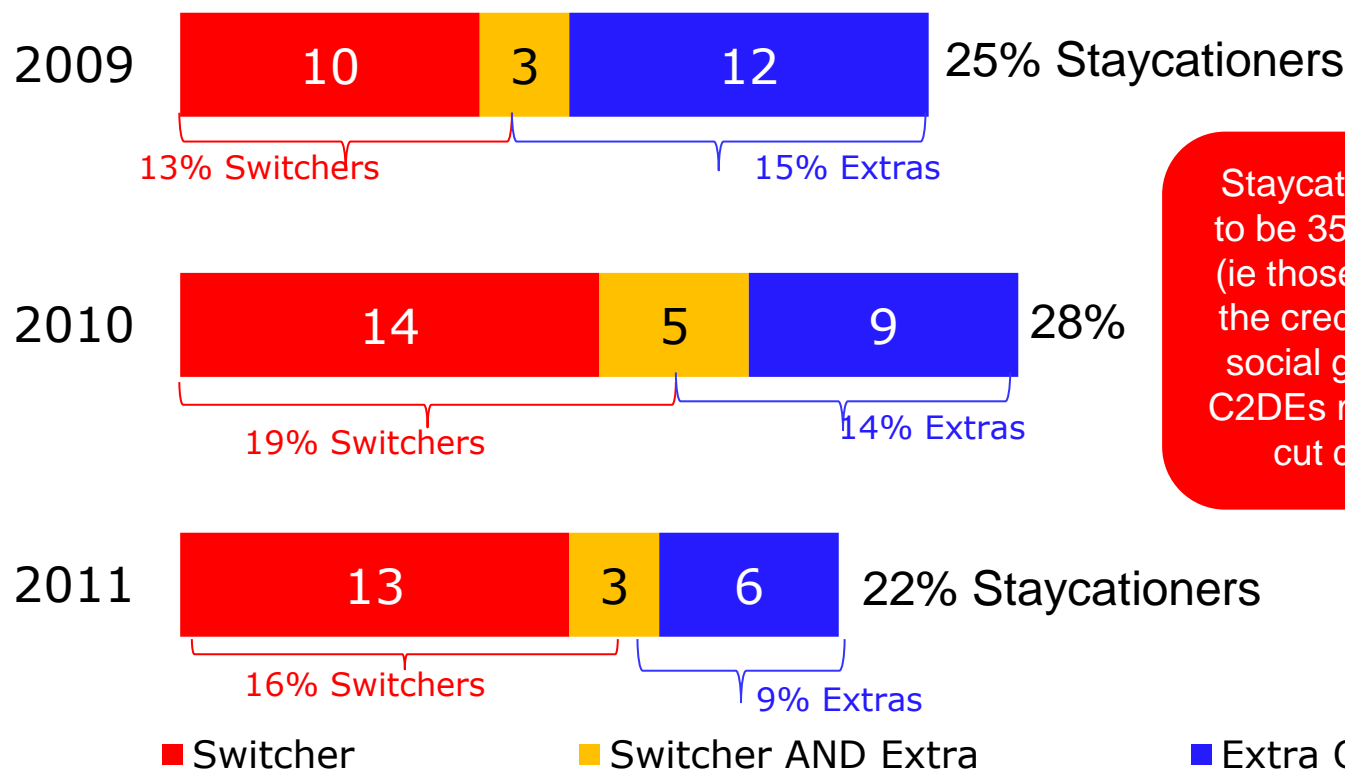
# 'Switchers' and 'Extras' – A Reminder

- '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 seen from 2009
- 2011 saw 5% more domestic holidays in England than in 2010, with no change in the number of holidays taken abroad (GB Tourism Survey)

# Level of 'switching' continued, but fewer now taking extra hol in England

- as Switching behaviour continues and becomes the 'norm' for many, we will be less able to measure it going forward

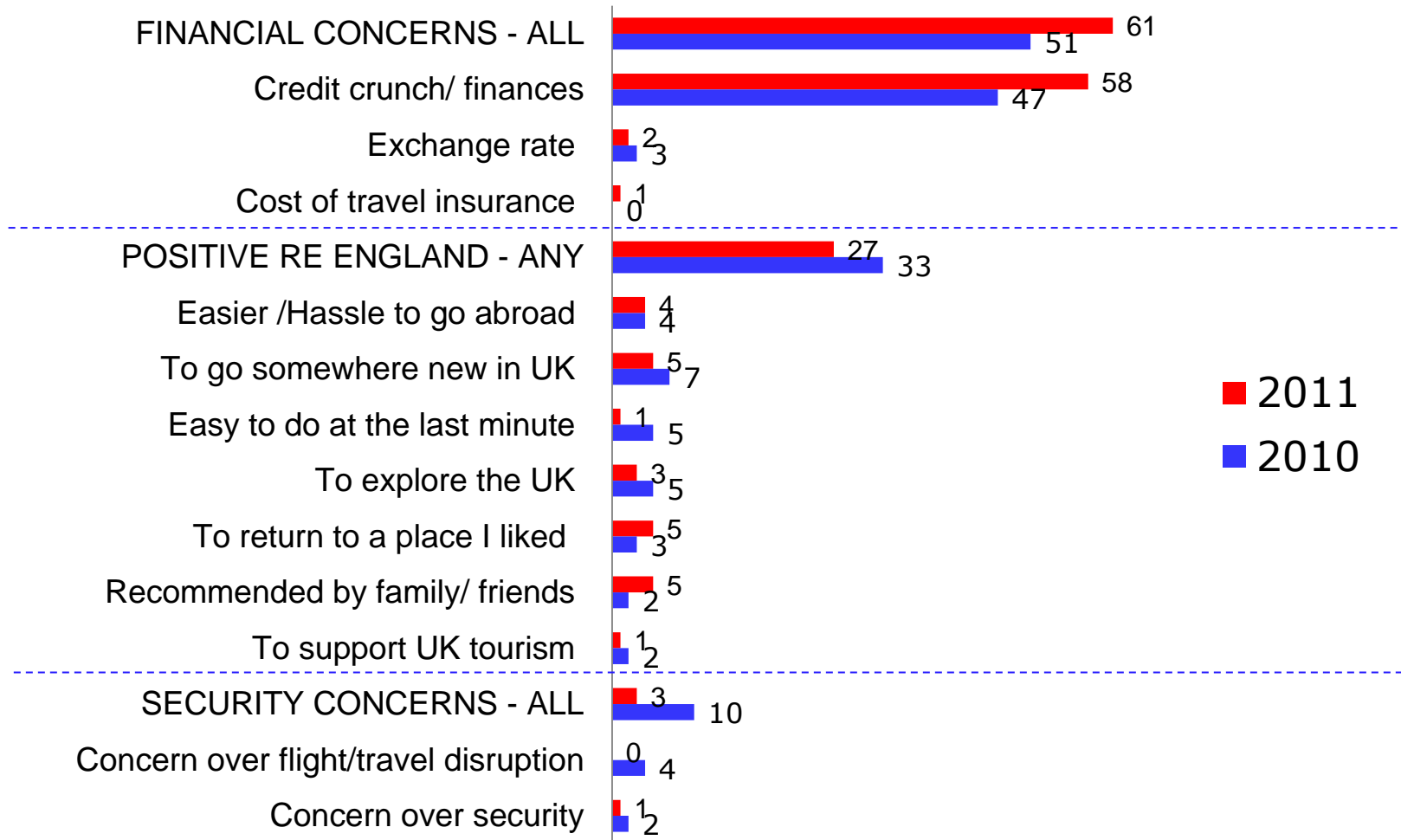
% Staycationer Types 2009 - 2011



Staycationers more likely to be 35-54 yr old families (ie those most affected by the credit crunch), but AB social grade, as affected C2DEs more likely to have cut down holidays)

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

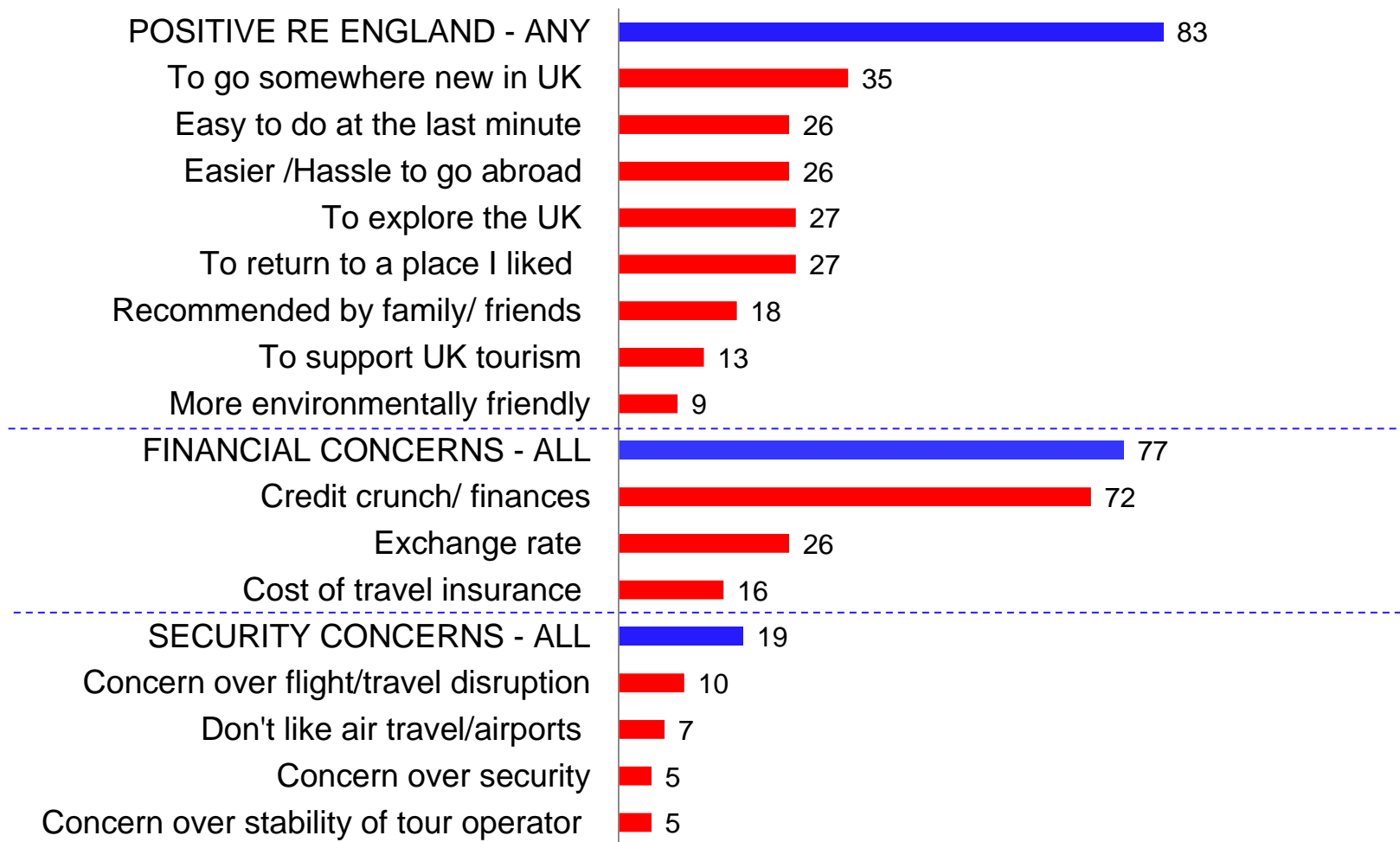
## MAIN REASON for replacing a holiday normally taken abroad with one in England



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 = 155)

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

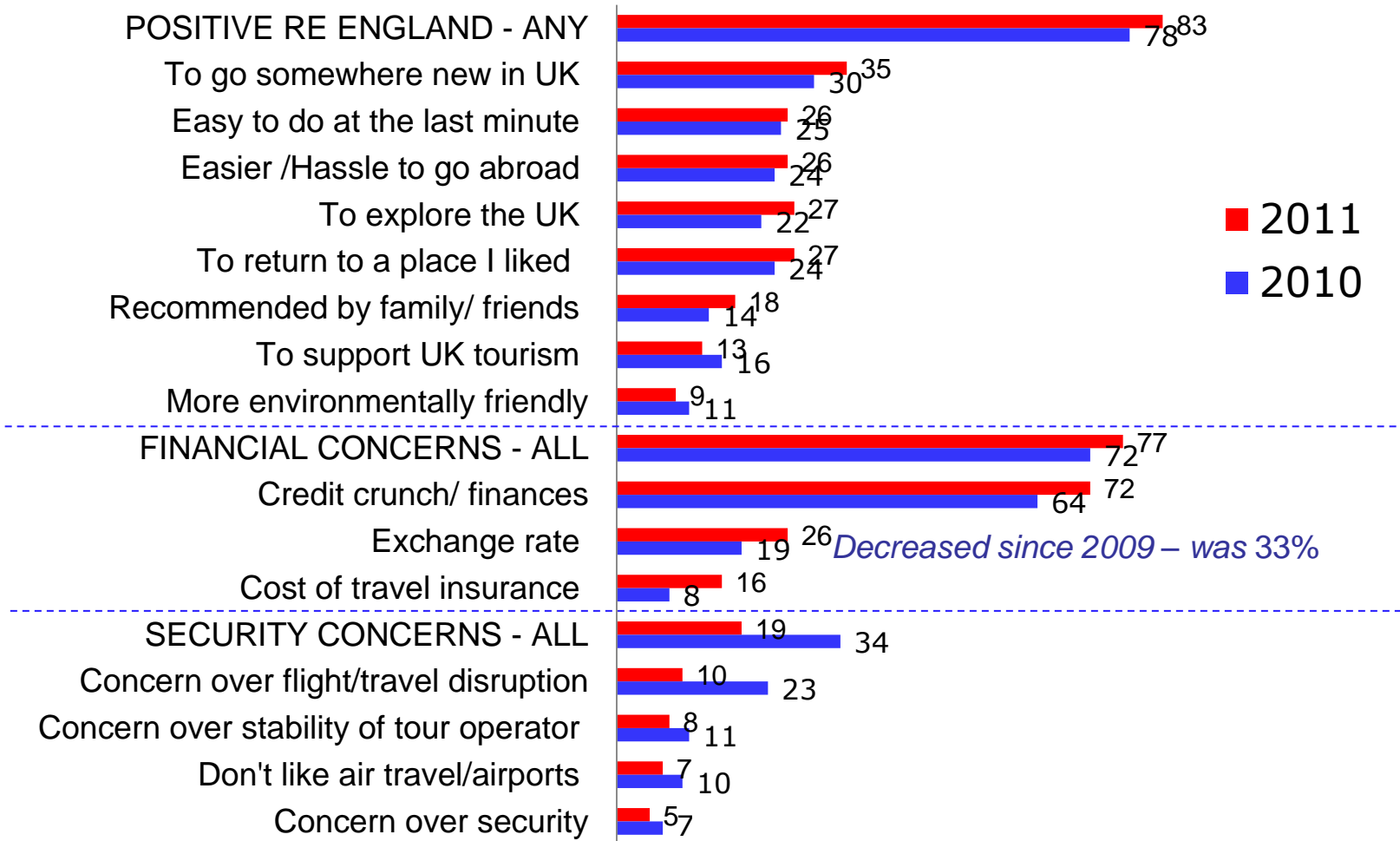
## ALL REASONS for replacing a holiday normally taken abroad with one in England



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 = 155)

# Fears over security/ holiday disruption now far less likely to be a reason 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 (2010=177 2011 = 155)

# THE 2011 EXPERIENCE

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



# England holidays, particularly self catering, continue to deliver a great experience

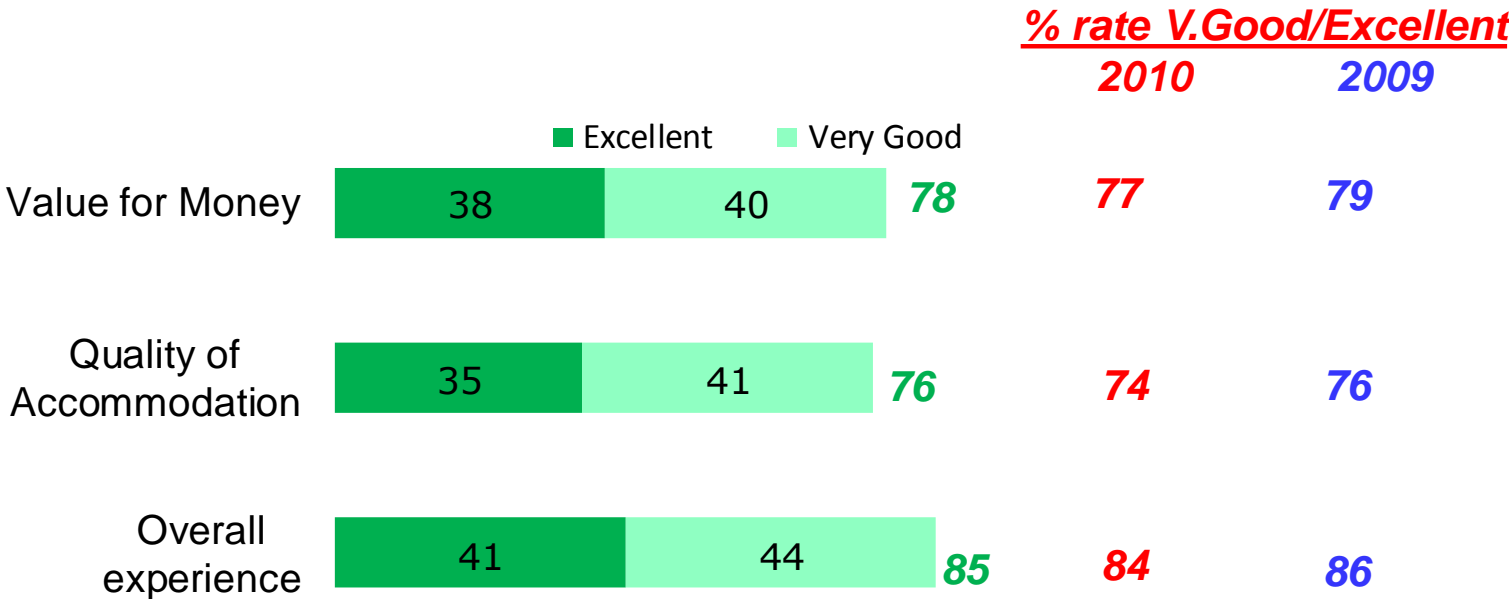
- particularly self catering holidays in villages...slightly less so if hotels/ B&Bs used

## Rating of England holiday taken, on: (%)

Village & camping best rated, City and Hotels/B&Bs poorest

Village and s/c best rated, Cities, hol camp/caravan poorest

Village, self catering and camping hols best, Hotels/B&Bs and City poorest



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

# Weather perceptions similar to 2010/09, just 7% had poor weather all holiday

## Weather on England Hol

**Good**

**Mixed**

**Poor**

**2011 holiday**



(36%)



(55%)



(9%)

(2010 holiday)

(2009 holiday)

(39%)

(50%)

(10%)

- As may be expected, the weather affects the overall rating of the holiday, but even 2/3 of those having poor weather rate the holiday highly

## Holiday Experience

**% Excellent/Very Good**

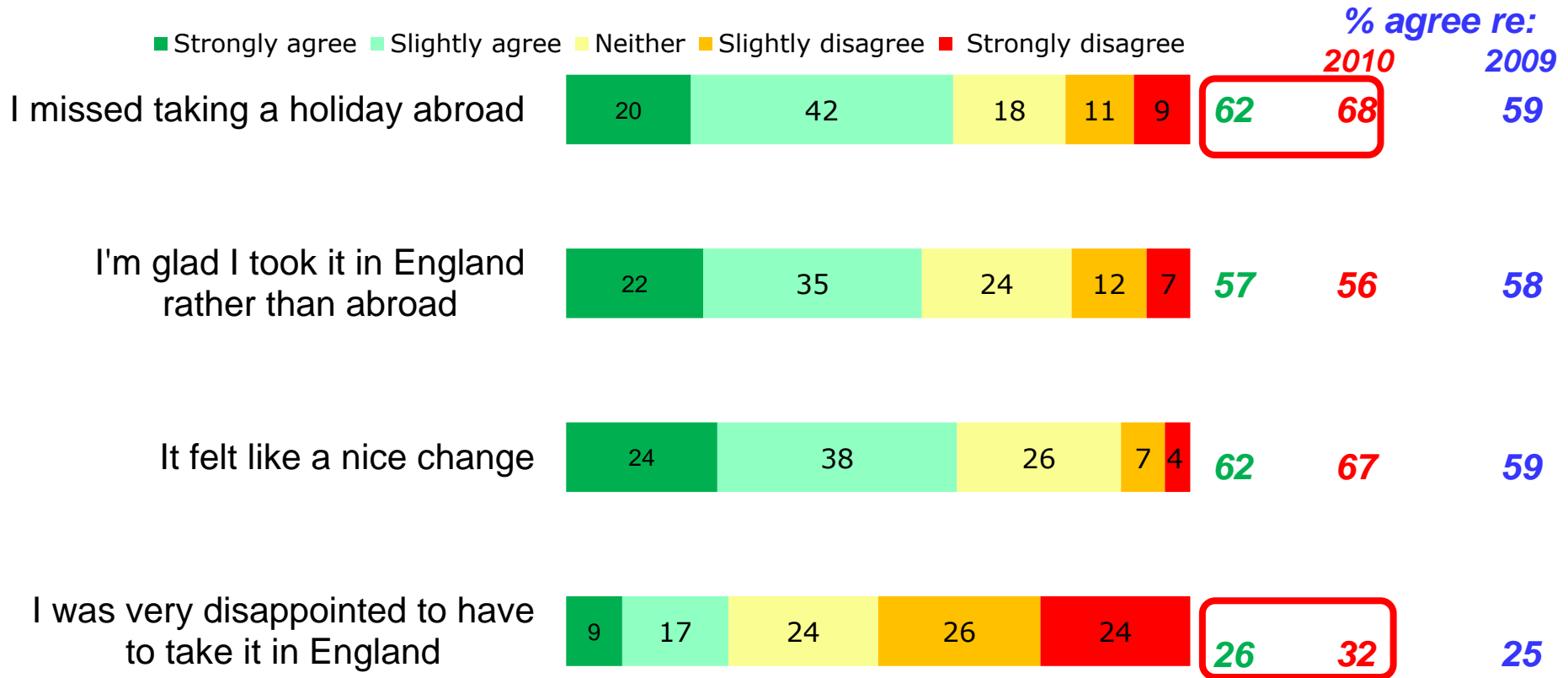
**89%**

**79%**

**67%**

# Fewer disappointed at taking a holiday in England rather than abroad vs 2010 😊

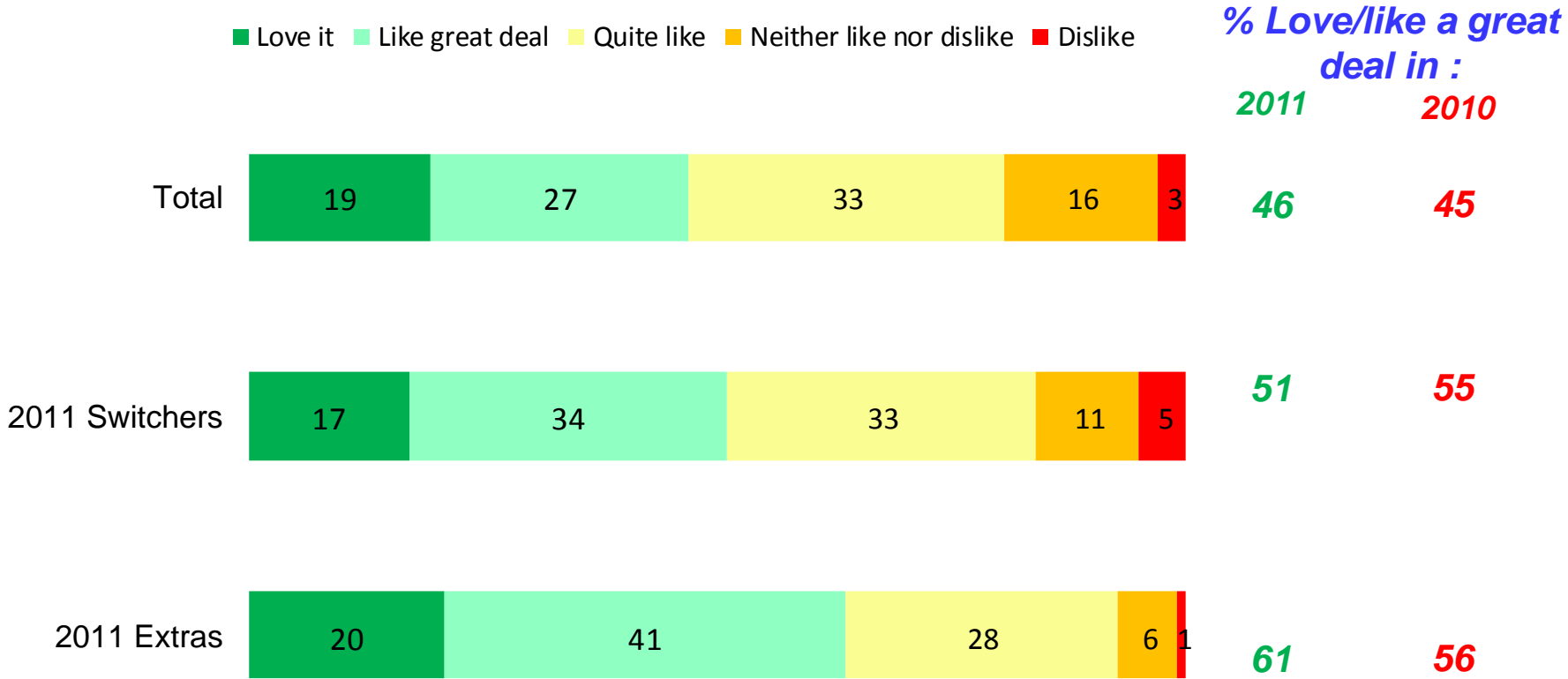
## Attitudes to taking a holiday in England rather than abroad in 2010 (%)



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 (base = 150+)

# Views towards taking English holidays remain very positive

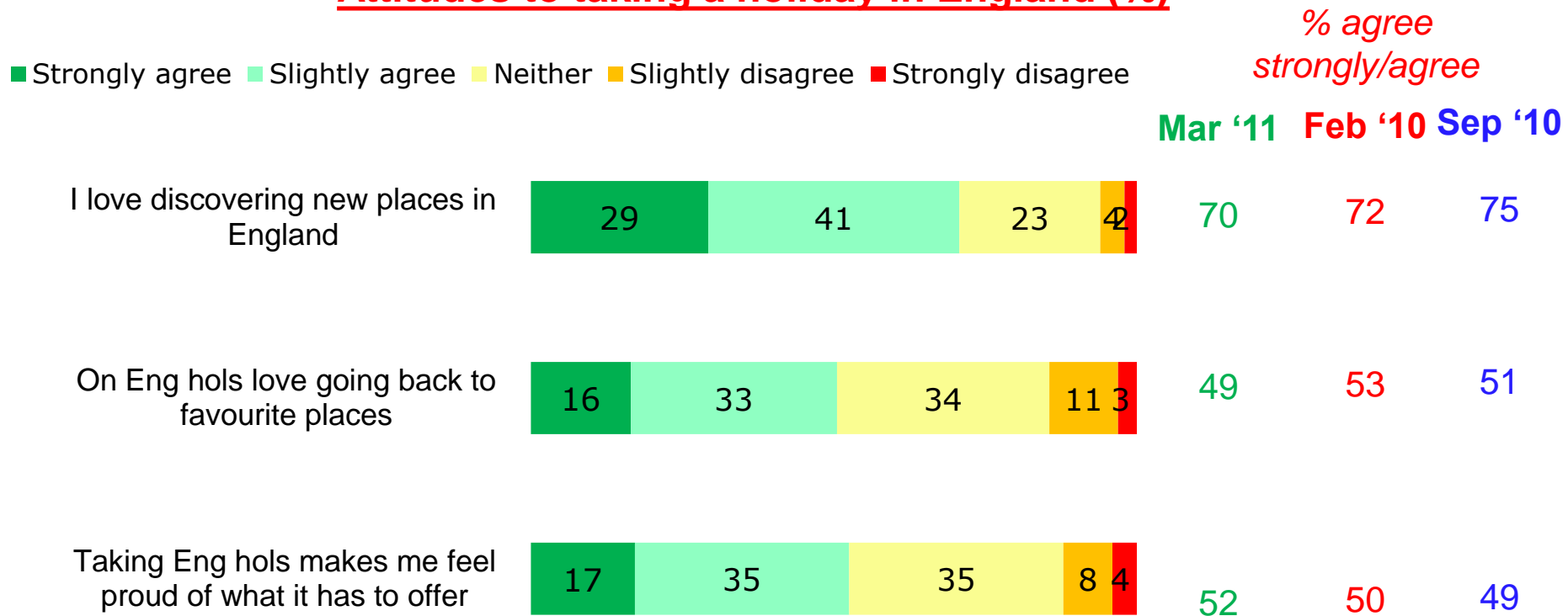
## Overall extent of liking holidaying in England (%)



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

# Discovering new places in England is more motivating than returning to old favourites

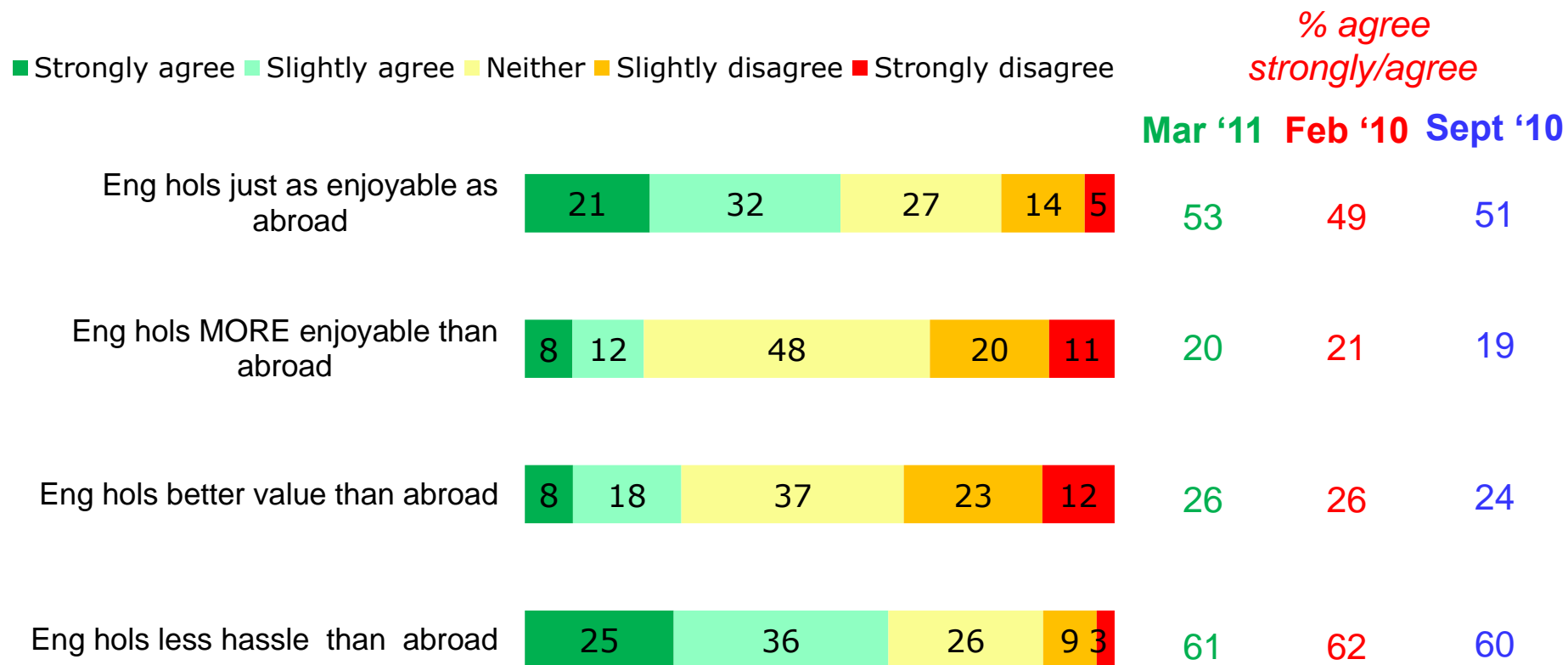
## Attitudes to taking a holiday in England (%)



Q10a To what extent do you personally agree or disagree with the following statements about taking a holiday in England?  
Base: All (1000+)

# Half continue to feel that holidays in England are just as enjoyable as abroad

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

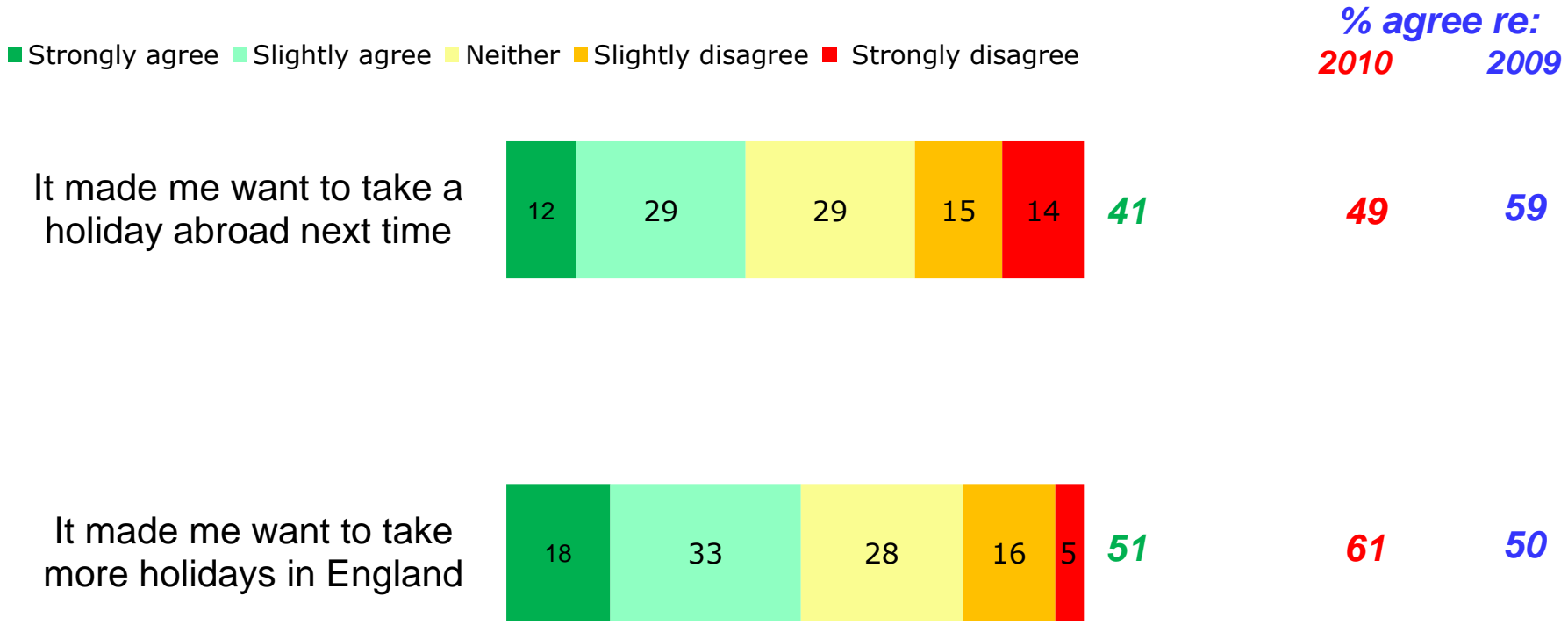


Q10a To what extent do you personally agree or disagree with the following statements about taking a holiday in England? Base: All

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

- And now just 4 in 10 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 (base = 150+)

# THE LONDON 2012 OLYMPIC GAMES, AND OTHER 2012 EVENTS

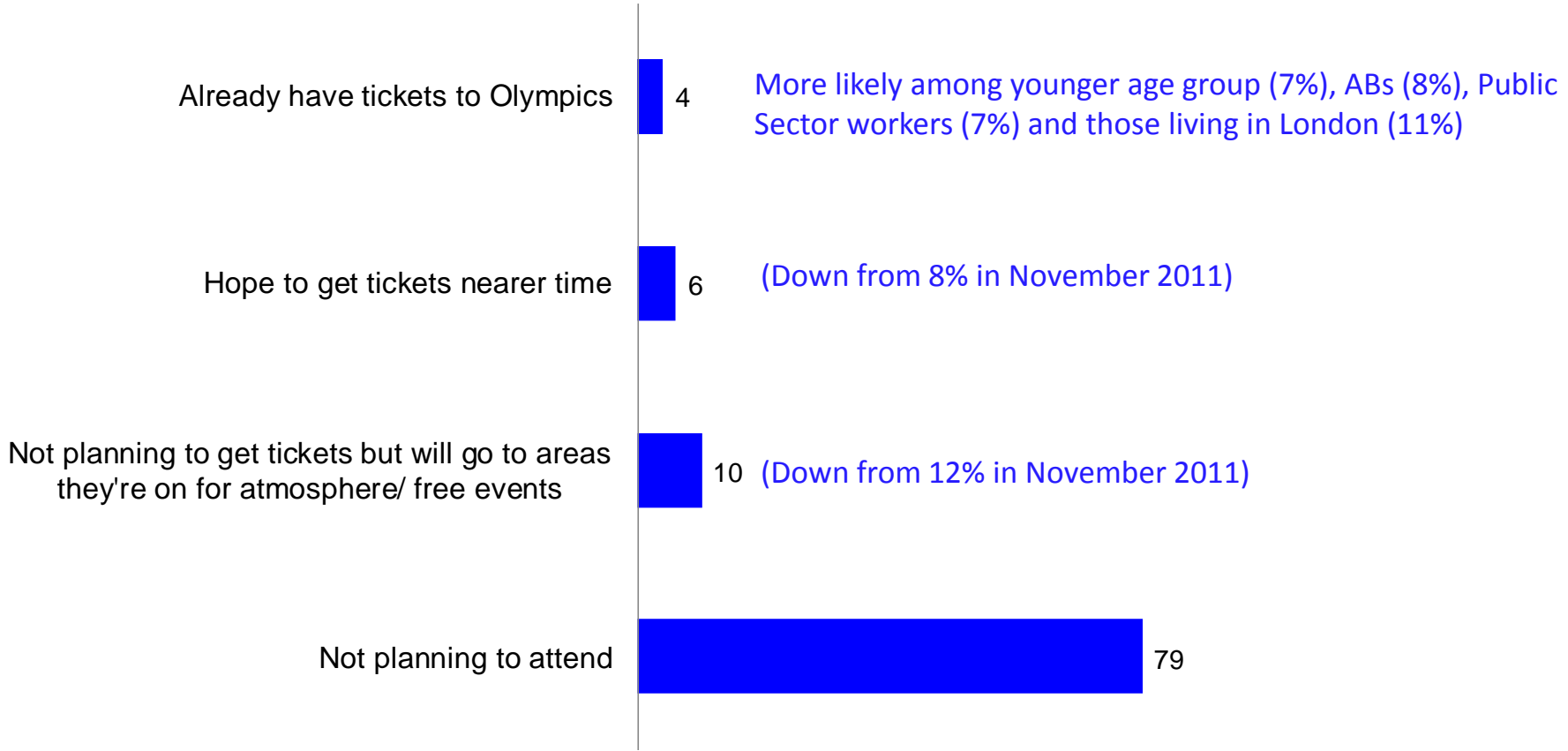
- *Who is visiting?*
- *What impact will the Games have on domestic tourism in 2012?*



# 4% of the population have tickets to the Olympics; as many hope to get tickets

Younger ABs in London most likely to have Olympic tickets

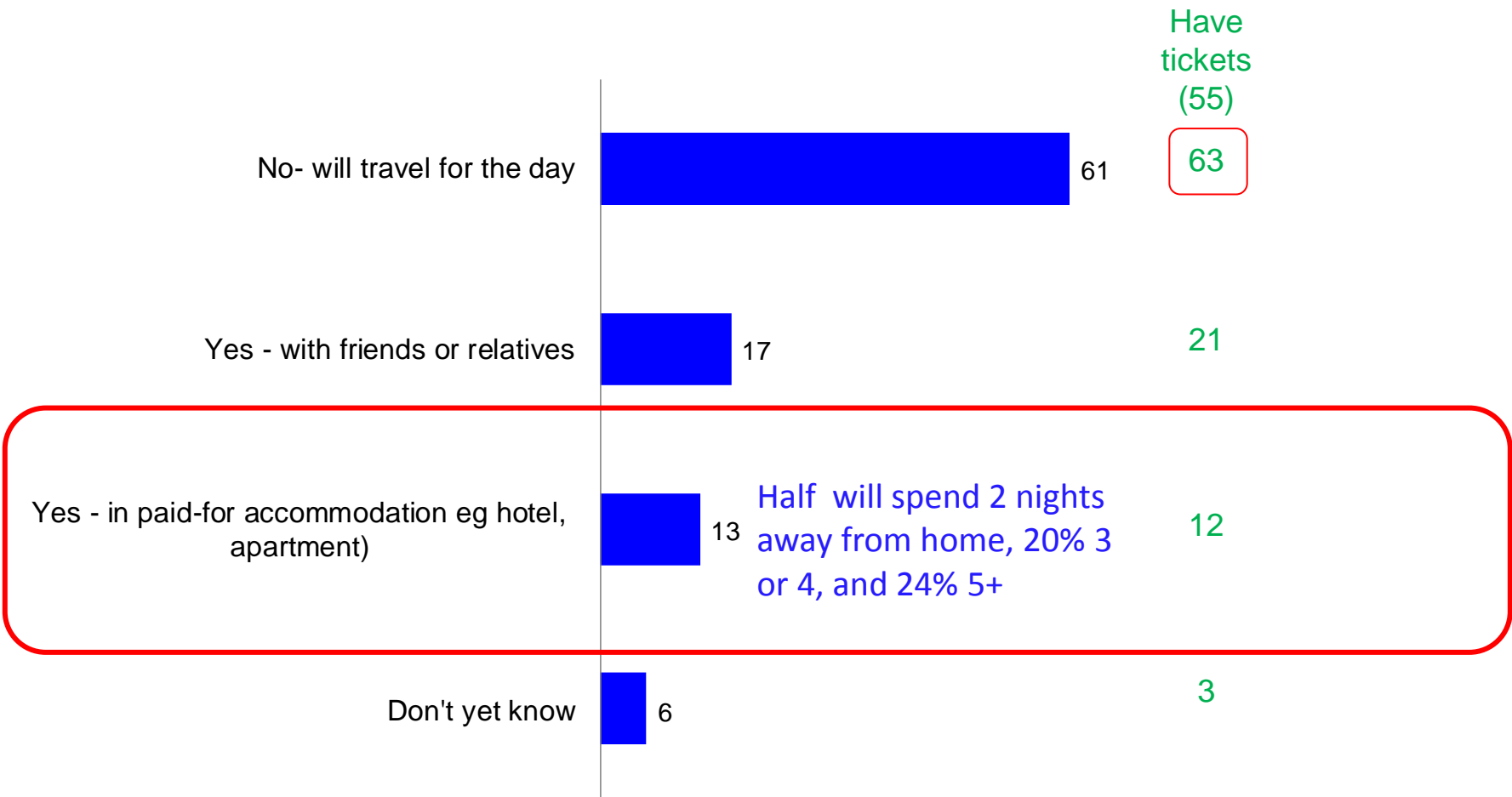
## Status re London 2012 Olympic Games (%)



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

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

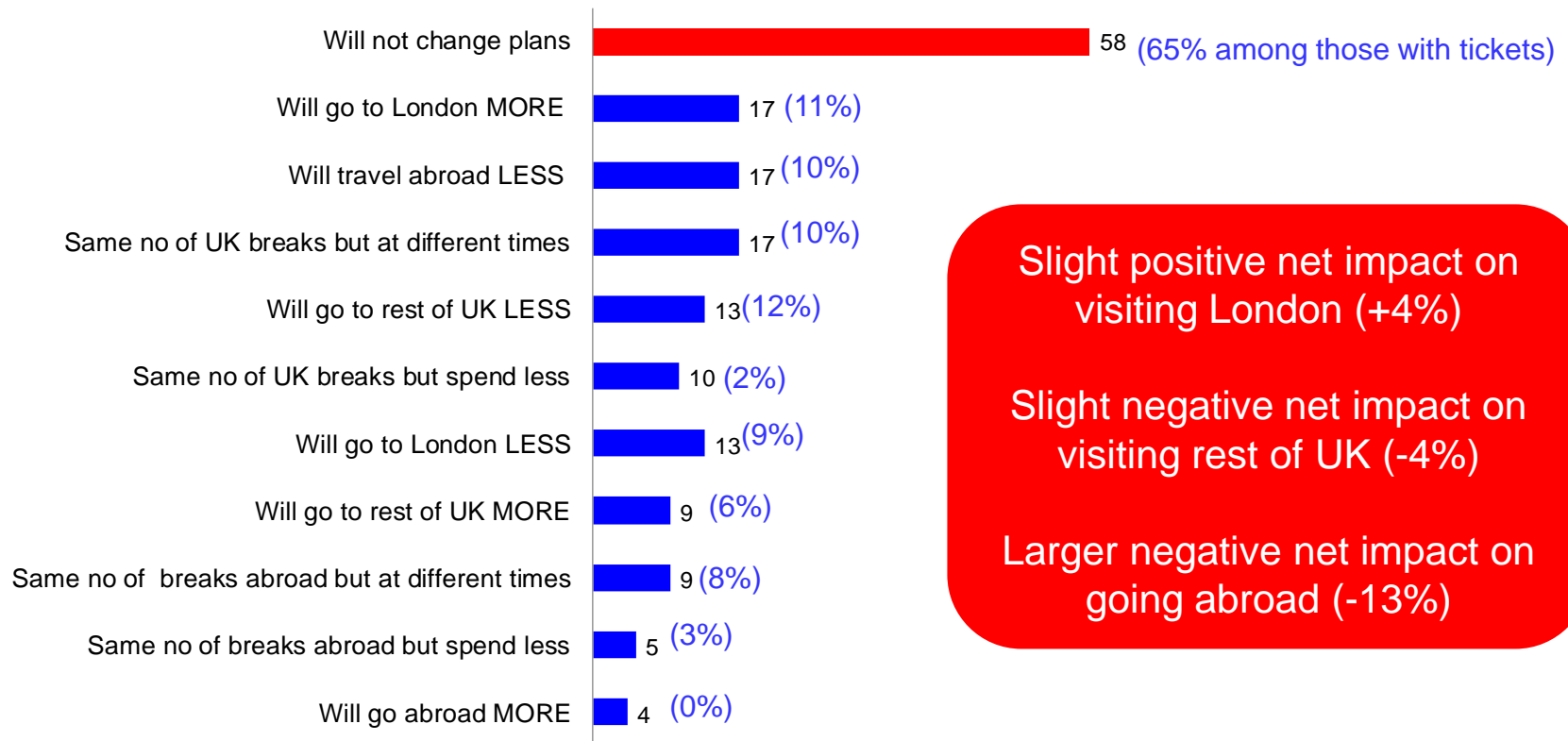
Whether visitors to the Games (or areas they're in) will stay away from home (%)



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)

# 6 in 10 of those planning to go to the Games will not change their '12 hol plans as a result

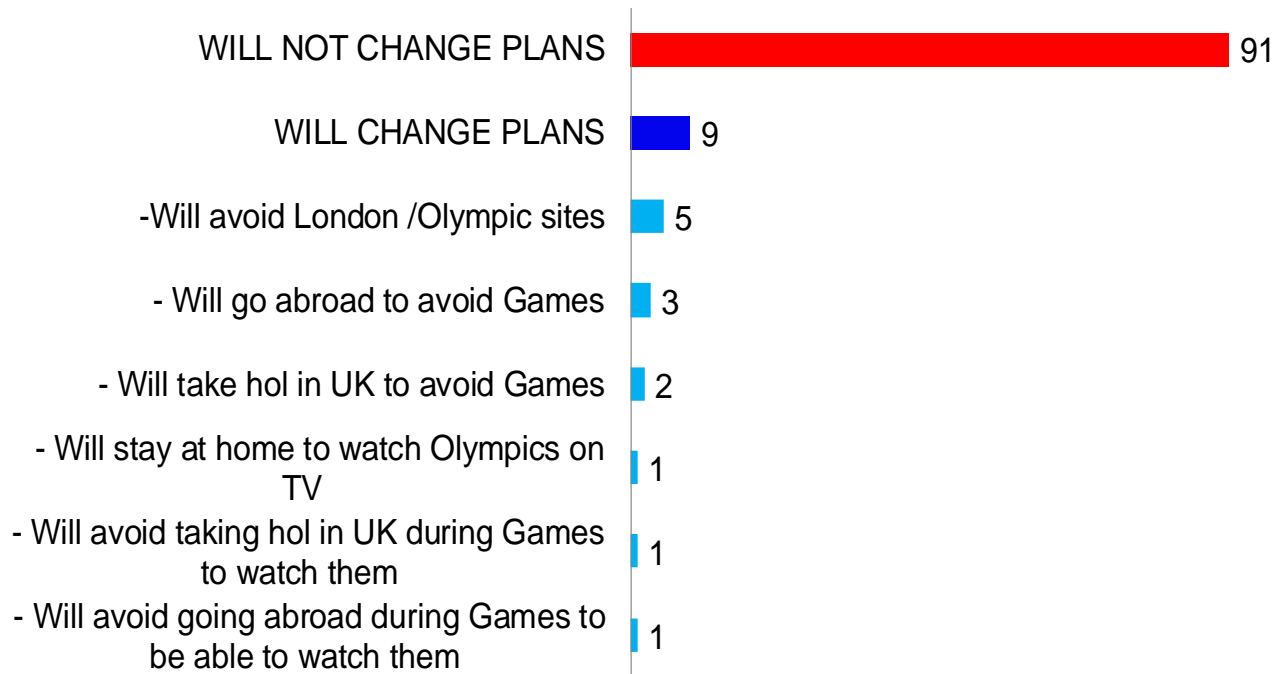
## How, if at all, will visiting the Games change 2012 holiday plans (% - can mention all that apply)



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 (41)

# 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)

# 8 in 10 of those not going to the Games will stay at home during the period they're on

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



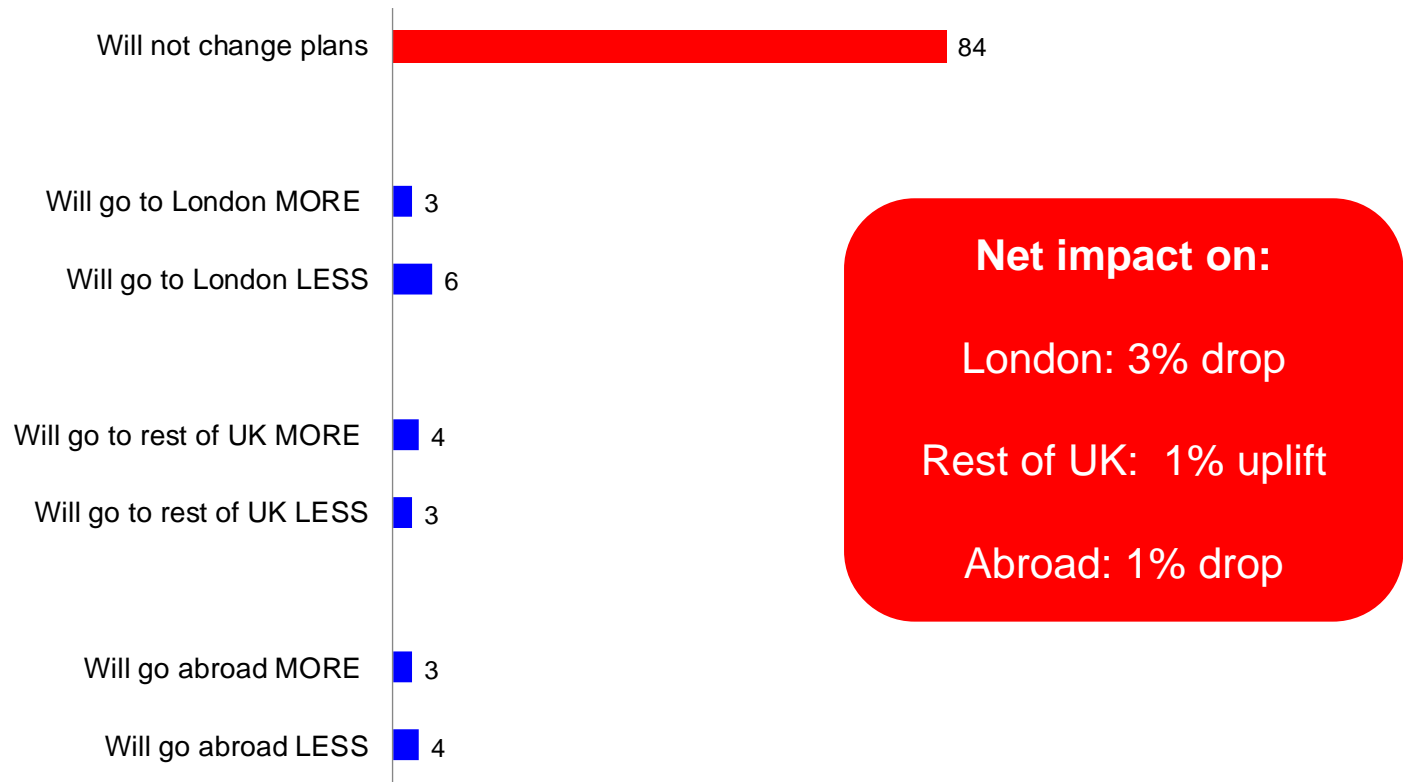
% Would take at this time anyway	% Would normally take at different time	% taking extra break
n/a		
66	18	16
58	23	19
Base too low to show %		

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

# 16% of the population will change 2012 holiday plans as a result of the Olympics

- small negative impact on visiting London, neutral for rest of UK/ abroad

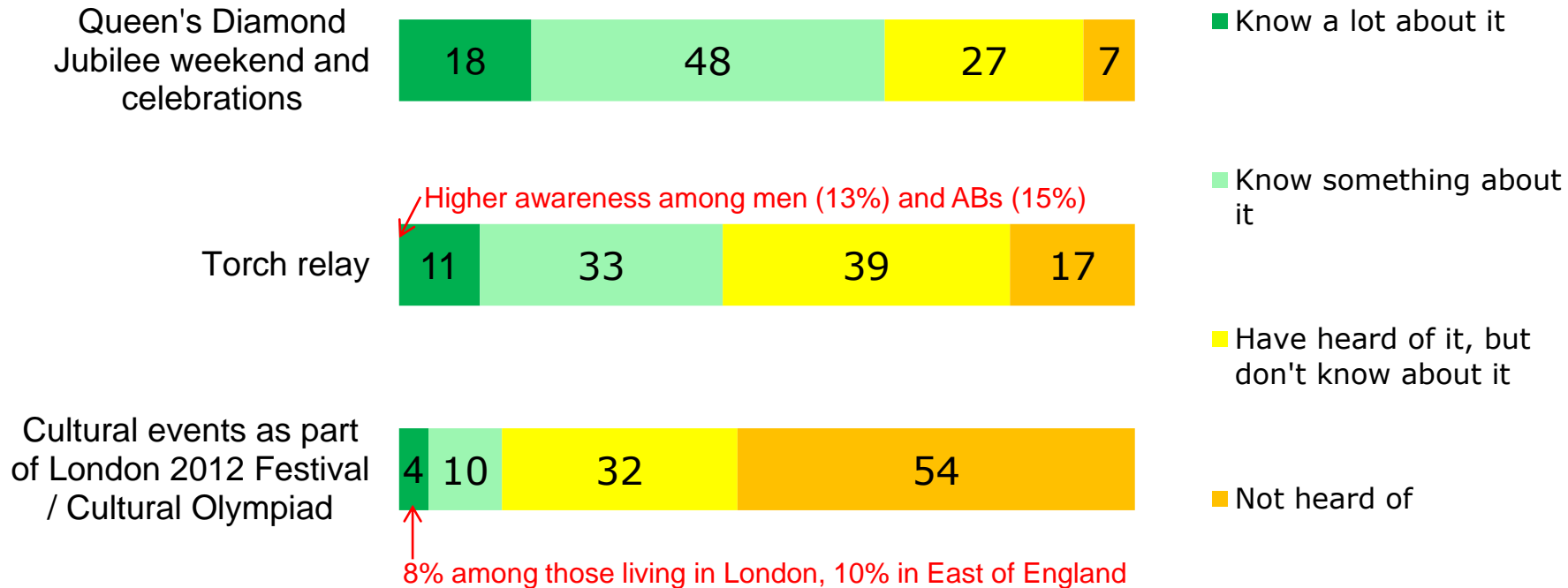
## How, if at all, will visiting the Games change 2012 holiday plans



Calculated from Q36a+ Q38. At Q38 have counted those saying 'Will avoid London/Olympic sites' in 'Will go to London less'

# Higher awareness of Diamond Jubilee & Torch relay than London 2012 Festival

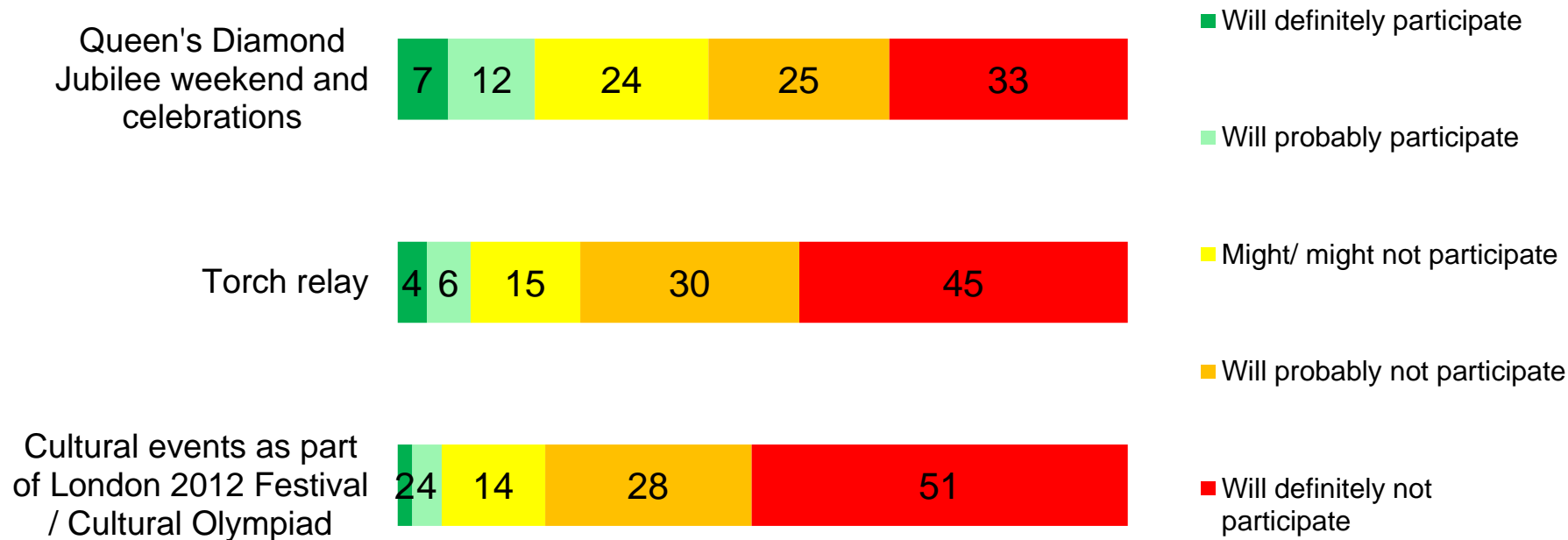
## Level of knowledge about 2012 events in UK (%)



Q41 As well as the Olympic Games and Paralympics, there will be a number of other events happening in the UK in 2012. How much do you know about each of these? Base: All respondents (1000+)

# 2 in 10 feel likely to take part in Diamond Jubilee celebrations, fewer in other events

## Likelihood of involvement in 2012 events in UK (%)



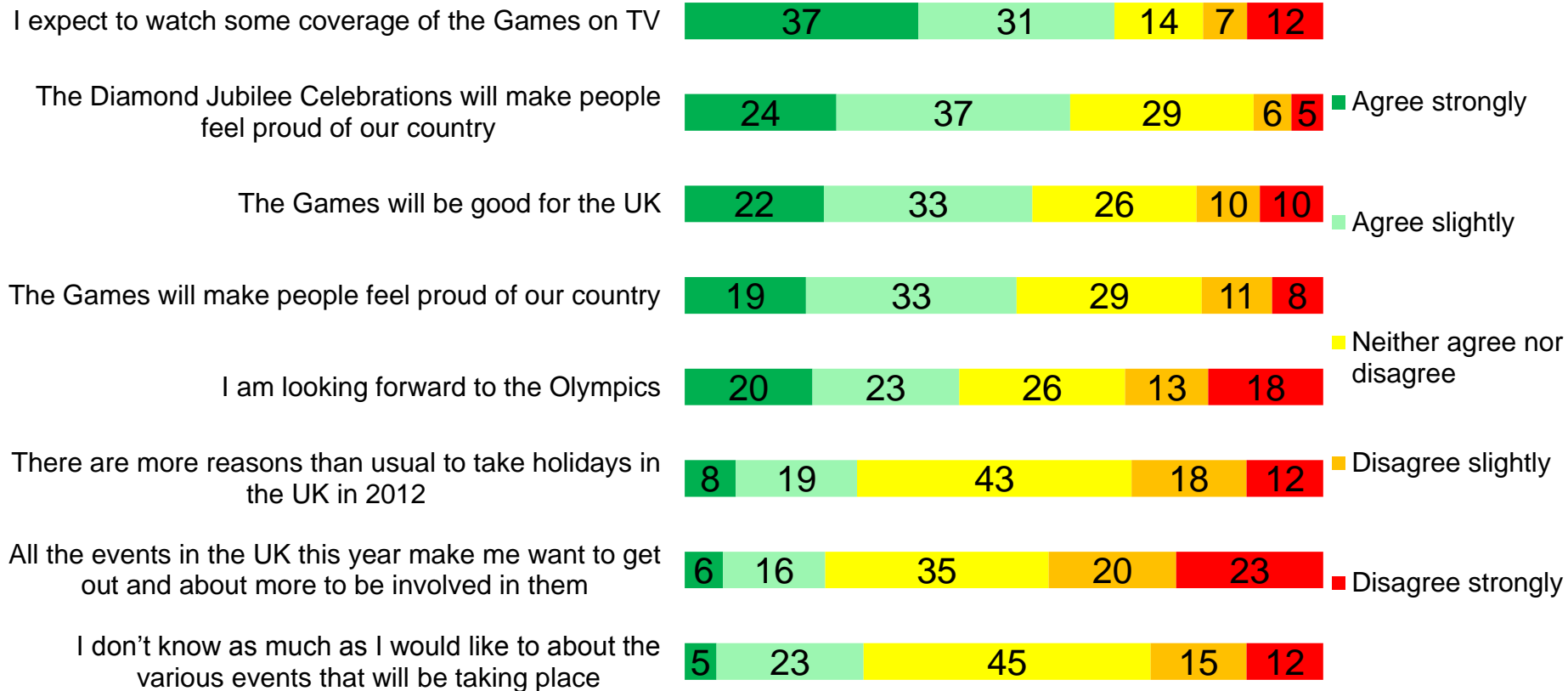
Q42 Do you think you will get involved in some way in these events, whether by attending or by holding your own celebrations?  
Base: All respondents (1000+)



# Positive views of the impact the Jubilee and Games will have on the country

- though they're not particularly felt to be reasons for holidaying in England

## Views on 2012 events taking place in England (%)



Q43 How far do you agree or disagree with the following statements about the Olympics and the other events of 2012?

Base: All respondents (1000+)

# 2012 AND BEYOND

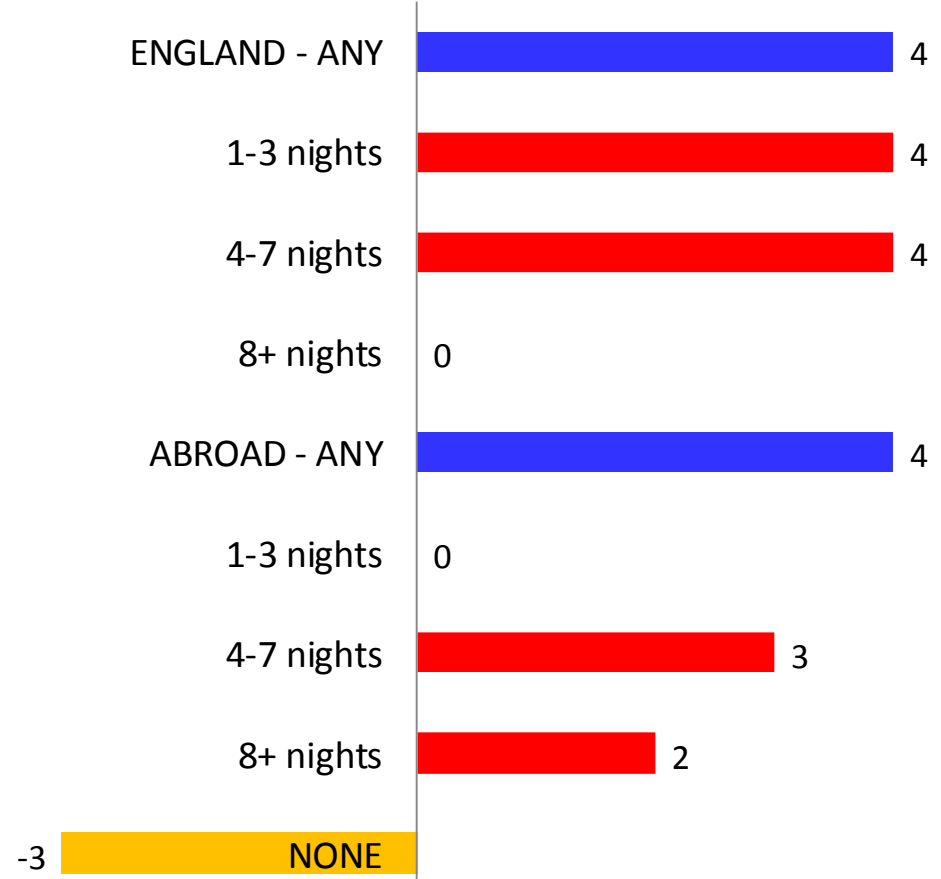
- *What holidays are people expecting (hoping?) to take in 2012?*
- *Hopes for holidays in a stable economic climate*

# Anticipated small increase in short/ mid length breaks at home in 2012

- though these may not be realised; previous plans were optimistic

## Expected change in % taking each holiday type in 2012 vs 2011

*(eg 4% more expect to take a holiday in England in 2012 than did in 2011)*



Previous predictions have been c. 8% higher than reality for short & mid length holidays in England, and c. 6% higher for mid & longer length holidays abroad...  
...2012 likely to be similar (or slightly up or down) vs 2011

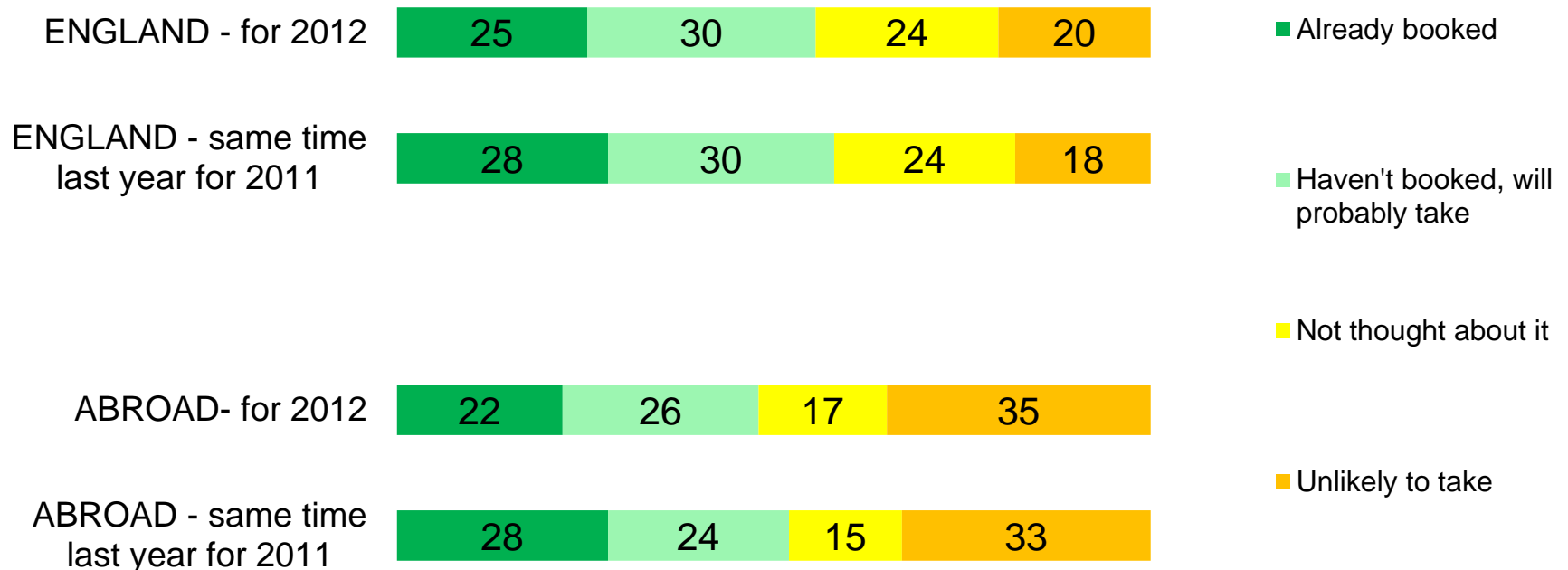
(No difference between Fans/ Repertoirists/ Tolerators)

Q7/9d How many of each of these holidays did you take in 2011? Q12 How many of each of these holidays do you think you'll take next year, in 2012? Base: All 1000+

# Bookings for hols to England/abroad are slightly down on the same time last year

- it therefore looks likely that we should assume a similar level of optimism over plans as seen last year

## Extent to which have planned 2012 holidays (%)

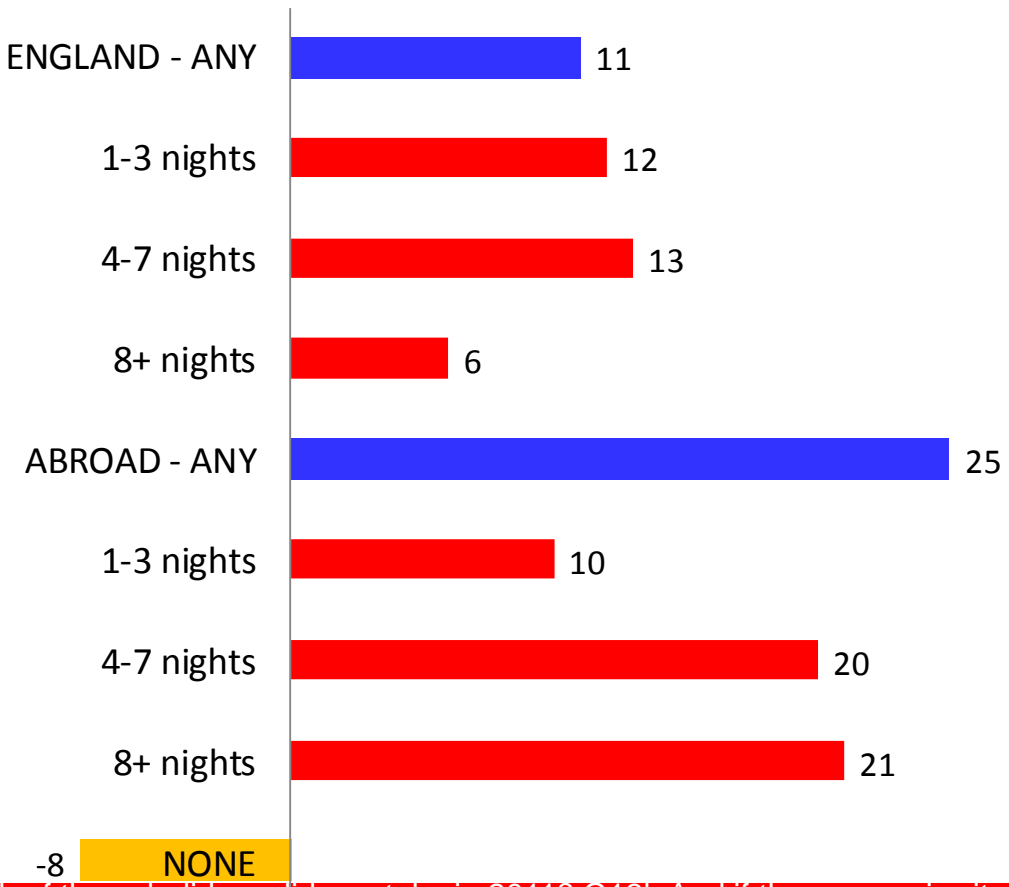


Q16a Which of the following best describes the extent to which you've planned your holidays/ breaks for 2012 in **ENGLAND/ ABROAD**? Base: All 1000+

# Post recession, people hope for longer hols abroad, but *also* want more England hols

Expected change in % taking each holiday type in 'a stable future' vs 2011

*(eg 11% more expect to take a holiday in England in 'a stable future' than did in 2011)*

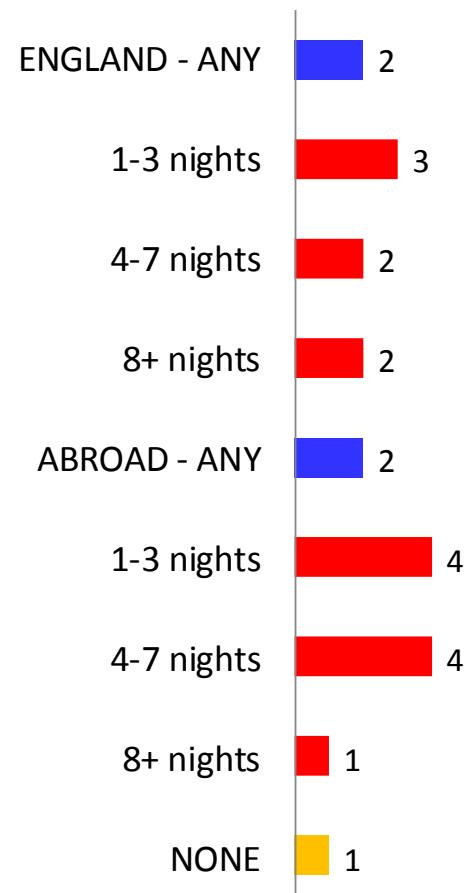


Q7/9d How many of each of these holidays did you take in 2011? Q13b And if the economic situation stabilises, how many of each type do you think you'll tend to take in future years? Base: All 1000+

# Post-recession expectation is likely to be similar to pre-recession behaviour

## Expected change in % taking each holiday type in 'stable future' vs pre-recession

*(eg 2% more expect to take a holiday in England in 'a stable future' than did pre recession)*

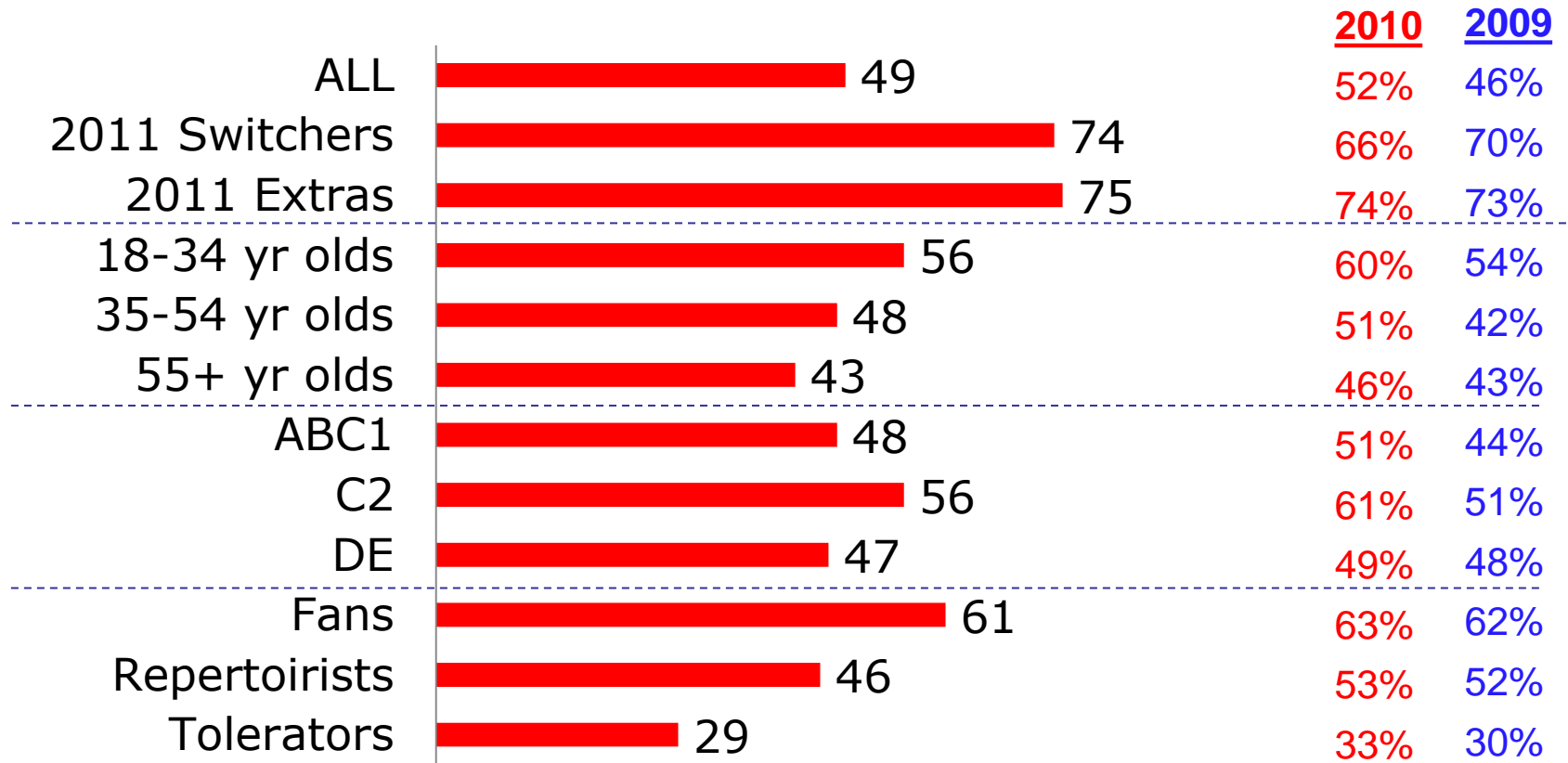


Q13a/13b How many of each type did you normally take per year a couple of years ago, before the recession? And if the economic situation stabilises, how many do you think you'll tend to take in future years? Base: All 1000+

# Around half feel likely to take more holiday in England beyond 2012 than they used to

- particularly those who changed their holiday behaviour in 2011

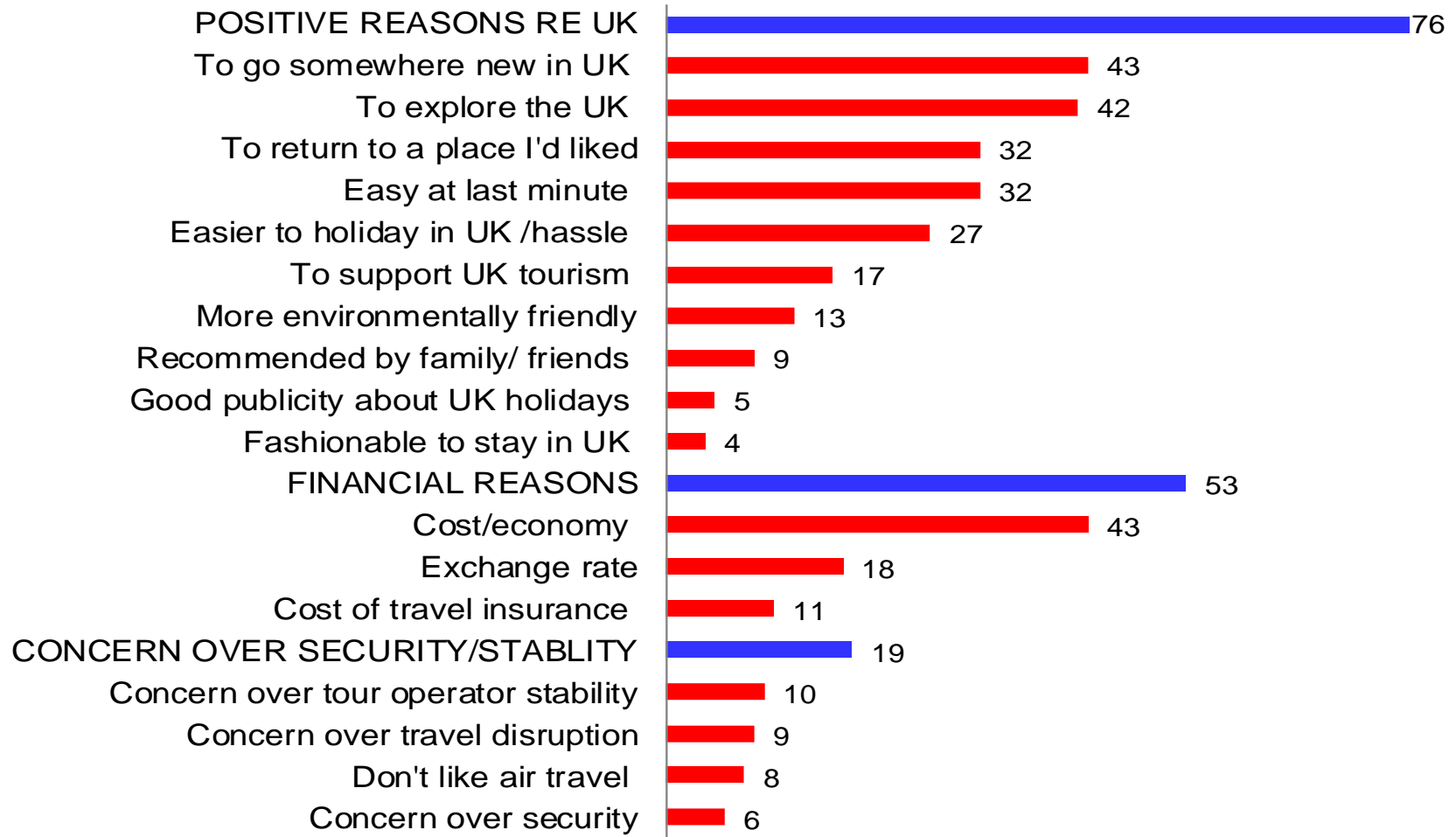
**% likely to take more holiday in UK beyond 2012 than used to**



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+)

# Positive reasons about the UK are the key motivators for wanting to take more UK hols

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



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 = 490)



# CONCLUSIONS

# Conclusions – Economy and the Staycation

- ❑ Continued high levels of concern over the economic situation and pessimism about personal finances in the coming year
  - Most affected and concerned are 35-54 year old C2DE families, and the older 55+ years unemployed
  - Least affected/ concerned are younger, 18-34 year olds without children, and older 55+ ABs, whose income may be protected
- ❑ The Staycation is alive and well, being driven by affected 35-54 yr old AB families
  - Positive aspects of England continue to be strong supporting reasons for switching
    - Primarily to explore somewhere new, also for the lack of hassle
  - Concerns over security and disruption now far less likely to be driving switching behaviour than a year ago

# Conclusions – 2011 Holiday Experience

- ❑ Holidays in England continue to deliver a great experience
  - Although Switchers miss their holiday abroad, few are very disappointed to holiday in England instead, finding it a nice change, and being glad to take their holiday here
  - Half of switchers are encouraged to take more holidays in England in future as a result of their 2011 experience
- ❑ Discovering new places and being less hassle than going abroad are key motivations for a holiday in England

# Conclusions – Olympics and 2012 Events

- ❑ The London Olympics are unlikely to impact 2012 holiday plans
  - Half of the 4% with tickets to the Games are from London/ South East, and so are likely to be making day trips to the Games
  - Just over 1 in 10 going to the Games /free events expect to stay in paid accommodation (and then typically for just 2 nights)
  
- ❑ The Games are unlikely to change 2012 holiday plans for either the minority attending events, or the majority who are not
  - Overall, 84% will not change plans due to the Olympics
  - Small negative impact on visiting London, net neutral impact on visiting the rest of the UK or holidays abroad
  
- ❑ Despite quite positive views of the upcoming events, with up to 6 in 10 feeling the Diamond Jubilee / Olympic Games will generate pride in the country, levels of participation in the events are fairly low, and they are not causing people to feel there are more reasons than usual to take holidays in the UK in 2012; most will watch events from home

# Conclusions – 2012 and beyond

- ❑ 2012 holidays to England and abroad are likely to be similar to 2011 (still be up on pre-recession levels, as the Staycation continues)
  - Although predictions indicate a 4% rise for England holidays vs 2011, previous predictions have proved optimistic, and may do so again
  - Continued high but stable level of concern over the economy and its personal impact is likely to mean that 2011 behaviour will not be significantly changed
  
- ❑ Once through the recession, half feel likely to take more UK holiday than they used to
  - Particularly those who took Staycations in 2011
  - Their positive reasons for doing so (to explore new places, in an easy, hassle free way) should be reflected in communication, to help convert intent to action



# Thank you!

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