The Digital Landscape and the Role of Social Media for the Domestic Visitor

Qualitative Research Insights
Prologue
Aims and Approach
Deep and Broad Aims

Confirm 7 steps to Nirvana still relevant and deep dive into their meaning in 2012

Understand role of digital at each step on the road to Nirvana

Deep dive into the role of social media throughout the journey

Provide this understanding across key target audiences

Ultimate deliverables:
- Up to date understanding of 7 steps & role of digital & social media
- Providing the building blocks for 'personas'
Iterative and sensitive approach

- Full immersion
- Desk research of 2009-2011 Qualitative work
- Interim Feedback
- Qualitative Research 4 x group discussions with 6 people in each
- Consolidated Programme Debrief
- Development Social Media Strategy Dissemination of Findings to Broader Audiences

We are here
4 free flowing, fertile & dynamic discussions with key targets

**Sample**
- 1 x group Pre Family (PF) Shallows
- 1 x group of Young Family (YF) Committeds (kids under 8)
- 1 x group of Older Family (OF) Shallows (kids over 8)
- 1 x group Empty Nesters (EN) Committeds

**Discussion Flow**
- Them and their passions
- Exploration of journey from inspiration to returning from last holiday in England
- Deep dive into all the inspirators and influencers
- Detailed examination of role of digital & social media
- Looking to the future
Act 1
Headlines

Times they are a changing
The 7 Steps to Nirvana (in 3 data periods)

Times are a changing

Inspiration is a 2 headed beast

Picture Power

Google is God

Integrated lives … not distinct offline and online existences
Lifestage & England involvement useful persona parameters

Diverse Social Media involvement in travel also relevant

Mobile Massive

Deal or Deal
The 7 Steps to Nirvana in three data periods

• 6 steps to Nirvana of 2009 are in fact 7
• With 3 interrelated phases of data activity

Data Period 1
Insemination, i.e. data to create an idea

Data Period 2
Cultivation…i.e. data to define & optimise trip

Data Period 3
Dissemination … i.e. data shared
Times are a changing - more points of inspiration

- New sources of inspiration across lifestages (less so ENs)

Social media is beginning to inspire... e.g. ideas from FB!!

Some of the quilting girls live up in Manchester and they went to Buxton House. I saw the images on Facebook and it made me think I wouldn’t mind going there. So I went on Google and organised then and there
Times are a changing - increasing socialness of conceptualisation

• Conceptualisation for some has become a more sharing activity

Social media is beginning to inspire...ideas as from FB!!!

Beginning to ask for help through FB

Although Google still God

You do ask your mates through Facebook whether they have been somewhere and what are good ideas or alternatives… you get a fair bit back and I always respond to requests
Times are a changing - ever increasing deal hunting

• Sense some folk are taking more time comparing

Social media is beginning to inspire...ide as from FB!!

Beginning to ask for help through FB...
Although Google still God

Deals have become even more important

I'll get something through on Groupon and then I'll search the net and investigate to see if can get it cheaper and then I'll go back to it and book it if it's the cheapest
Times are a changing - booking remains pretty much the same

- No change at the booking stage

Social media is beginning to inspire…ide as from FB!!!

Beginning to ask for help through FB… Although Google still God

Deals have become even more important

Little change

(Minor mention less trust in aggregator sites so go direct)
Times are a changing - defining seems to be shifting

- Families and Empty nesters still spend a lot of time here but PFs certainly a lot less

Social media is beginning to inspire... as from FB!!!

Always got to have a Plan B so I checked if there were hotels nearby in case we hated camping and also what was around

Although Google God

FB... Although Google God

OF

Defining (Pre trip)

Fs & EN still a lot but perhaps a little less than once

PFs very little
Times are a changing - info on the hoof natural part of life for many

- Getting info on the hoof through mobile phone
- normative* across Lifestages and taken for granted

Inspiration

Comparison

Conceptualisation

Price and book

Defining (Pre trip)

Back at the ranch

On the hoof

Huge increase volume and variety of info sourced

Massive increase in sharing

I came out the caravan & the sun was rising and a big boat was going past. I wanted to share my good feelings with everyone so I took a photo and stuck it on Facebook

Nope never get info on the go I know what I am going to do before hand... (15 mins later) When we were in Brighton we used the Taste Card App to find a great Tapas bar...I have just contradicted myself haven't I?

I don't do much before hand I have an app on my phone...Oh god can't remember what it is but I use it a lot

Although Google still God

YO

PF

OF

* as little as 3 years this was rare behaviour
Times are a changing - sharing increasing exponentially

• Across lifestages huge increase in sharing occurring
  – most notably through Facebook
  – but also more contributing to TA et al (or at least feel should)

Social media is beginning to inspire…ideas as from FB!!

Deals have become even more important

I get back and it gets tagged and all goes on Facebook...I just want to show the friends and family

Beginning to ask for help through FB…Although Google still God

Although Google still God
Inspiration is a 2 headed beast

The idea (or catalyst to action) comes from external

Used to be mainly off line but now digital and social

Most prevalent in Pre Families

Potentially more prevalent for England than abroad

The individual puts his/herself in an environment to receive inspiration

Might have idea for break /trip but no idea where to go or what to do

Can Google, ask friends (off and online); read the papers, go to Last Minute

Very prevalent for Families

If you're sat on train feeling low and lonely and see something and feel yes that is it and then you go online to find out about it

I am on Groupon and am always taking up their trips and things to do...I read them avidly and I always read the bits in the papers looking for ideas
• The influence of a picture can not be understated
• One that enables viewer to put self into mood, feeling, emotional charge of the place
  – whether this be through formal comms.
  – or simply from a friend's image in Facebook
• Particularly pertinent for PFs and Fs
  – where seek sense of fun, joy, excitement from England

Pretty scenery is not going to work for me...I need to see people enjoying themselves. Not necessarily a club but you know people having a good time...you need to understand England can be like that and it is
Google is God!

- Google remains the first step for huge majority
  - even at inspiration stage
  - and certainly at Conceptualisation, Comparisons and Defining
- Can be very general in first visit
  - mood, general location, day trip
- Or very specific type of holiday and location

Well you just Google it don’t you…I put the brands of hotel in or the location I want to go

I wanted to go camping in North Cornwall so I put this into Google and it came up with a number of suggestions
People Live Integrated lives...not off versus on line

• People lives not defined as off vs on line
  – don’t think in terms of 'social media' and digital as separate parts of their lives
  – they are fully incorporated within lives
• Indeed initially underreport social media and digital relevance in travel
• Yet when probe extensively get many stories
  – how see something off line then immediately go on line
  – see something on line and then ask others physically about it
  – get ideas through social media (Facebook, Groupon)
  – see offer on e.g. hotel newsletter & then call direct to find out more
Differences between lifestages pronounced and pivotal

**Pre Families**
Need emotive inspiration & education

**Older Families**
Plan Bs
Bonding/sharing/ nostalgia

**Young Families**
Discounts, packages, ease
Quite basic

**Empty Nesters**
How to get most out of trip; how to learn

Relevant as can impact on info needs but sense less pivotal than lifestage

**Shallows**
- Needs firm ideas where to go for what
- Need info/education
- But also appreciation of emotional benefits
- (But needs more governed by lifestage)

**Committeds**
- Need to have ways of finding out more about destination
- Getting better unique experiences
- (But needs more governed by lifestage)
Diversity in SM/ digital enlightenment & travel orientation also relevant

- Range of orientations to Social Media and England trip / travel taking

- Broadcasters
- Info Seekers
- Info Receivers
- SM avoiders
In 2009 many suggested "one day we will use our phones when we are on trips to source info"
  - only very small number PFs (Cosmos) doing back then

By 2012 become a truth for many across lifestages!
  - maps / directions
  - opening times / ticket prices
  - Plan Bs / alternatives
  - local restaurants / bars entertainment

Indeed Pre Families this can be THE source of info through various apps (e.g. AroundMe, Taste Card)

Interestingly ENs & Fs many underreport initially
  - because a natural / integrated part of life?
  - or are even in a state of denial!!
Deal or Deal

• Deals always been important in travel but given tough times & cultural contextual climate now even more so
• With most people looking to get something cheaper – taking a little more time over the comparison phase
• And indeed can also inspire through Groupon etc or coming across deals in either on line or off line world
• Deals working on two main levels …

Deal -
• Making things cheaper
• All about the saving (3 for 2; 1/2 price etc)
• Mainly accommodation; travel; all inclusive
• Across life stages

Deal +
• Making things better
• Give access to something new / different / better
• Attractive is the 'extra', often Acc+, or travel ticket +
• More PF and EN
<table>
<thead>
<tr>
<th>Points to ponder re implications of headlines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The 7 Steps to Nirvana (in three periods)</strong></td>
</tr>
<tr>
<td>Industry needs to consider, manage the three data periods: inception, cultivation; dissemination</td>
</tr>
<tr>
<td><strong>Times are a changing</strong></td>
</tr>
<tr>
<td>Digital and social media much more relevant vs 2009. In particular inspiration and defining</td>
</tr>
<tr>
<td><strong>Inspiration is a 2 headed beast</strong></td>
</tr>
<tr>
<td>Need to consider how best to penetrate the active spaces and drive passive inspiration</td>
</tr>
<tr>
<td><strong>Picture Power</strong></td>
</tr>
<tr>
<td>Create / manage / excite through environments where pictures shared creating powerful evocative emotions</td>
</tr>
<tr>
<td><strong>Google is God</strong></td>
</tr>
<tr>
<td>How can Google be utilised and optimised?</td>
</tr>
<tr>
<td><strong>Integrated lives … not distinct off and on existences</strong></td>
</tr>
<tr>
<td>Comms media / marketing must be integrated as much as possible and not considered as separate universes</td>
</tr>
</tbody>
</table>
Points to ponder re implications of headlines

Lifestage & to a lesser extent England involvement useful Persona parameters

Lifestage impacts on needs, wants and drives from holiday in England and should be lead element in personas. England involvement secondary

Diverse Social Media enlightenment in travel also relevant

SM enlightenment is equally important as England involvement in personas and will require different considerations on how best to utilise

Mobile Massive

The immediate future is mobile. Is there a way to manage apps / optimise their content to inspire and stimulate / advise industry in best way to utilize

Deal or Deal

Deals are massively vital to industry and important to cultivate both those all about the saving and those that encourage and inspire new behaviours
Act 2 - The English Domestic Tourist in the digital world

Social Media Rising
Digital world changed considerably in last 3 years

- Considerable changes in digital world in 3 years since previous website development research
- Digital per se become fully integrated now within almost everyone's lives
  - most aspects
  - more than they themselves realise
- Mobile internet huge increase in use
  - across lifestages!
- Tablets emerging
  - and if not quite mainstream certainly aspirational
- These developments impacted on role of digital in the info journey for trips and travel in England
2009 digital big in the middle steps of journey

- Inspiration
- Conceptualisation
- Comparisons
- Price and book
- Defining (Pre trip)
- On the hoof
- Sharing back at the ranch

importance of digital's role

2009
Digital's role is now crucial at all steps.

- Inspiration
- Conceptualisation
- Comparison
- Price and book
- Defining (Pre trip)
- On the hoof
- Sharing back at ranch

2009

2012

importance of digital's role
Very different levels of digital /SM enlightenment in population

- **Broadcaster**
  - Share across digital routes, comment, rate

- **Info Seekers**
  - Share a bit, but more about going out & always actively seeking and finding info

- **Info users**
  - Not necessarily seek until holiday time
  - But always open to suggestions
  - Limited use of SM

- **SM avoiders**
  - Reject concept of SM
  - Don’t much like digital
  - Use as have to
Broadcasters highly influential minority

• Broadcasters are not that common
• They tend can be
  – Pre Family
    • but by no means all
  – or Professionals (Family)
  – even EN
• They are using Twitter; Facebook; TA and others
  – regularly contribute; share; make suggestions re their trips
  – continually sharing photos on the hoof
  – answering requests of others re their plans
• They will have Smart Phone and probably a tablet
• Radar is always up for new trip/travel apps; SM and will be using them in fairly sophisticated way
Info seekers are ever increasing

- They are as likely to be EN and Families than PF
- Some do share (PF, YFs)
- But more about using digital actively and enthusiastically to get information
- They will avidly use TA; hotel newsletters (Older), Groupon/AA etc
- They will Google & use local tourist board sites
- They may use mobile on the hoof for restaurants and opening times
- They will also talk to others
  - PFs & YFs may even ask through Facebook
• There are still a large number of info users but they are potentially a decreasing group
• There approach is fairly utilitarian & pragmatic
• Digital has enabled them to organise and book trips better
• And as such largely get involved at holiday / trip time
• They might use TA but only very cursory way and they will use hotel and tourist board sites at most
Digital Avoiders on the wane

• There are still some out there who try to avoid digital
• They will use minimally for booking & finding deals
• But they do not try to use SM
  – indeed can actively reject it
• They can be from any lifestage but are probably more likely to be older (but NOT exclusively)
• They wont use mobile on the go
• (Be careful some people will pretend to be like this but in reality are not)
## Notable players

- Consistent players emerge in the digital Space

<table>
<thead>
<tr>
<th></th>
<th>Insp.</th>
<th>Concept.</th>
<th>Comp.</th>
<th>Booking</th>
<th>Defining</th>
<th>On hoof</th>
<th>Sharing at home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google</td>
<td>A lot</td>
<td>A lot</td>
<td>A lot</td>
<td>Not</td>
<td>A lot</td>
<td>A bit</td>
<td>Not</td>
</tr>
<tr>
<td>Facebook</td>
<td>A bit</td>
<td>A bit</td>
<td>A bit</td>
<td>Not</td>
<td>Not</td>
<td>A bit (share)</td>
<td>A lot</td>
</tr>
<tr>
<td>TripAdvisor</td>
<td>A bit</td>
<td>A bit</td>
<td>A lot</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>A bit</td>
</tr>
<tr>
<td>Tastemade.com</td>
<td>A lot</td>
<td>A bit</td>
<td>A lot</td>
<td>A lot</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
</tr>
<tr>
<td>Local Tourist Boards</td>
<td>A bit</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>A lot</td>
<td>A bit</td>
<td>Not</td>
</tr>
<tr>
<td>Hotel/resort</td>
<td>A bit</td>
<td>A bit</td>
<td>A bit</td>
<td>A lot</td>
<td>A bit</td>
<td>F2F</td>
<td>Not</td>
</tr>
<tr>
<td>Tastecard</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>A bit</td>
<td>A lot</td>
<td>Not</td>
</tr>
<tr>
<td>Twitter</td>
<td>A bit</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>Not</td>
<td>A bit (share)</td>
<td>Not</td>
</tr>
</tbody>
</table>
In brief the key players...

Google
- Universal
- Trusted
- Used throughout process
- Across all targets

Facebook
- Lovers and haters
- But does inspire through others or through deals
- Huge on sharing
- Minority use promos
- Some reporting benefits of tagging

TripAdvisor
- Used widely by all
- Mainly as reference point
- A few commenting
- Many feel should comment more
- Many claim pay more attention to negatives than positives
- Others very methodically

Lastminute.com
- Mainly PFs
- City breaks
- A place for ideas
- and potentially deals

Tastecard
- Mobile apps emerging
- Folk do forget use them
- On the hoof getting important logistical info
- But also inspiring ideas
- Generating Plan Bs
- Getting ideas for entertainment

Twitter
- Broadcasters clearly using to inspire others
- (and show off)
- But also sense others being affected more than realise
- Pick up ideas / thoughts etc
In brief the key players...

<table>
<thead>
<tr>
<th>Expedia</th>
</tr>
</thead>
<tbody>
<tr>
<td>- More international</td>
</tr>
<tr>
<td>- But some using for England for hotels</td>
</tr>
<tr>
<td>- But underlying sense not so cheap</td>
</tr>
<tr>
<td>- Level negativity emerging re navigation etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Local tourist board</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Often don’t go direct</td>
</tr>
<tr>
<td>- End up through Google</td>
</tr>
<tr>
<td>- Useful sources of what’s on; ideas; Plan Bs etc</td>
</tr>
<tr>
<td>- Some can feel a little lacking on inspiration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hotel/accommodation sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Used to book</td>
</tr>
<tr>
<td>- But also as information sources as to what is to do in location</td>
</tr>
<tr>
<td>- Also as stimulation for alternative destinations</td>
</tr>
</tbody>
</table>
Act 3 - The Audiences

Different Strokes...
A note on the parameters...

- Went in with hypotheses key parameters re target
  - England orientation
  - Lifestage
- And that they were linked
  - i.e., Pre Family and Older family more likely to be shallow
  - EN & YF more likely to be committed
- Nothing saw contradicted this
- Although lifestage seems much more powerful parameter than orientation
- However, 3rd parameter worth considering
  - Social Media Enlightenment (linked lightly to lifestage)
<table>
<thead>
<tr>
<th></th>
<th>Wants</th>
<th>England</th>
<th>Digital</th>
<th>Key journey points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PF</strong></td>
<td>Fun, social, energy, ease</td>
<td>Feel Ignorant and bit lost</td>
<td>Most connected but where to get inspiration?</td>
<td>Inspiration, on hoof, sharing</td>
</tr>
<tr>
<td><strong>YF</strong></td>
<td>Fun, ease, cost</td>
<td>Limited portfolios but feel less ignorant</td>
<td>Mixed but can be heavy users Facebook</td>
<td>Planning stages and sharing</td>
</tr>
<tr>
<td><strong>OF</strong></td>
<td>Bonding, nostalgia Adult escape, discovery, relax</td>
<td>Quite confident Revisit with family Explore new</td>
<td>Mixed from highly (professionals) to limited</td>
<td>Less inspiration as have to have structure (school hols)</td>
</tr>
<tr>
<td><strong>EN</strong></td>
<td>Learning and discovery (and freedom)</td>
<td>Know England want to discover deeper</td>
<td>Mixed but less keen on SM broadcasting</td>
<td>All about planning (although on hoof emerging!)</td>
</tr>
</tbody>
</table>
PFs: A diverse audience

• The most digitally connected and enlightened group per se
• Most ardent users of social media
  – although there are marked differences in levels of sophistication between them
• Great variance in SEG and psychographics
  – from ‘skint’ school leavers
  – to fun seeking affluent professionals
  – to those considering to start families
• As such can see greatest diversity in interests, passions and ways to spend leisure time
PFs ‘Fun & ease’ common needs

- Although disparate they do have common ground
- Clary fun is a key need for their trips
  - good times
  - often social
  - exciting / different things to see and do (particularly pertinent for trips in England)
  - more high energy (although spas also prevalent for women)
- And given ignorance re country some want to make it as easy as possible
  - all in one place
  - not too far or difficult to travel too
• Real sense of ignorance re England
• Stick to what know
  – city breaks
  – spas
  – places been before
• Or lean towards packages
  – that cover off all needs
• Lost where to get inspiration!!???
  – or general information
PFs all about the beginning and end of the journey

- Inspiration
- Conceptualisation
- Comparisons
- Price and book
- Defining (Pre trip)
- On the hoof
- Sharing back at the ranch

Kind of just book it and make it up as you go along
PFs: Inspiration crucial yet wait to be inspired

• Inspiration passive…i.e they don’t seek it for England holidays
• Therefore must be instantaneous & powerful re England to inspire PFs
  – i.e. they wait to come across something to be inspired by but when they do….!
• PFs can be fertile to right inspiration…
  – visual
  – emotionally evocative
• And most fertile when they bored; tired; stressed

Olive Watchpoint:
Inspiration for England trips for this audience needs to be interruptive; evocative with sense of fun (and ease!)
Multitude of inspirators cited by PFs

TV (programmes and ads)

Social media (endorsement; friends WOM)

Events (festivals, stags, hens, weddings, football games)

Google

Newspapers

Newsletters/Last Minute

Physical WOM

OOH

Physical WOM
I saw Britain's most haunted house on telly up near Preston and it coincided with a Spurs game at Blackburn. So I went on line booked somewhere nice nearby and got a bracelet for Blackpool...job done!

I went to Camber Sands on a Sun Holiday. I saw it was a good deal It was easy and close by

On twitter I saw that Ludacris had been to this Caribbean restaurant in the city… I hadn't head of it but thought might give it a go

You do see photos of friends on Facebook having a good time somewhere and it gives you the idea to go
PFs: conceptualisation, comparisons, booking - simple, quick & easy

- PFs very comfortable with these parts of process
- Progress through it quickly, simply and easily
- Google is king here and almost always first step
- Then use aggregator/comparison sites widely yet quickly
  - Trip advisor
    - Read thoroughly and opinions formed from all comments
    - Use the amateur pictures to see “what really like”
  - accommodation sites Cottages4u; Late Rooms to compare etc.
  - Expedia to book
    - although some cynicism emerging
PFs: Pre trip defining tends to be half hearted

- Tend to be most superficial target re defining pre trip
  - quick Google visit, put post code in and see what comes up
- Few are particularly methodical
- Unless 'building' a large social event

Once I have booked it up that is pretty much it... I tend to find out about stuff more when I am there
PFs: On hoof is where most defining occurs - and plenty of sharing

On the hoof DEFINING

- When arrive and during time there establishing what to do
  - local tourist sites
  - Apps e.g. Around me
- Accessing key information
  - Plan Bs
  - opening times
  - entertainment / information

On the hoof SHARING

- Many uploading visuals as and when experiencing
  - communicating how feel in the here and now
- And can be inspired when see others (evocative!)
- In addition can upload where they are & get benefits (e.g. free shots)
  - conscious being used as marketing tool but it’s a win -win

Seeking things to entertain and do

Showing off a little & sharing the fun
PFs: Considerable sharing occurs post trip

- Lot of sharing with this audience when get back
  - up-loading to Facebook
  - word of mouth with friends
  - showing photos on phone
- Seems typically about showing good times
- They do 'review' but normally when things are bad
  - on contemplation feel should review more as utilise others reviews
- In addition within their peer group there are ‘heroes’ whose opinions they seek and listen to more closely
  - friends who are known to have knowledge and experience and for sharing it
  - or even older relatives!
YFs perhaps most homogenous of audiences

- Those with young families have very similar needs
- The focus of course is on their young children
- Their own passions, hobbies and interest can take a back seat
- They seek to deliver fun, 'education' for their kids
- Holidays and trips are crucial 'spaces' to deliver this
- They typically are pretty digitally literate
  - high prevalence of Facebook
• Many seek an 'easy' life with regards to holidays and trips
• As such England can appeal
  – travel simple
  – not too 'scary'
• Consequently seem to have more confidence in own knowledge than PFs
  – although portfolios seem limited
• Yet England can be perceived as expensive
  – particularly on the accommodation, food and activities front
• As such they tend to lean towards all in ones / packages
  – as these can offer manageable costs
  – and can make life easy
They need to plan their trip and get it right.

- Inspiration
- Conceptualisation
- Comparisons
- Price and book
- Defining (Pre trip)
- On the hook
- Sharing back at the ranch

Importance
YFs are really on look out for deals

- They have much more ordered and planned approach re deals to PF (&EN)
- As such inspiration is more active but less powerful / important for breaks holiday etc
- They proactively seek deals through variety online and off line sources
- Having said this potentially they can behave more spontaneously for day trips
  - respond to changes of scene / mood etc
YFs more active (yet less powerful) inspiration

Deals

Google

WOM offline (other parents; their own parents)

OOH (day trips)

WOM online (FB)

Resort/hotel/accommodation sites

Newspapers

Newsletters
Because of the little ones you do want to keep it nice and easy... you don't want to have to travel too much.

I get newsletters from Haven and they give you a list of their sites and you might click through to the one you are interested in. I like those trips because you have everything in one place. It is nice and easy.

You listen to your friends and family as you need that reassurance.

I got to Google and might type in family holidays on the Norfolk Broads. There is such a volume of info that you have quick access to...you just flick through the options.
YFs take a little time to plan
To ensure that they have things to do
– that all affordable
– don’t have to travel too far
They will compare and contrast and seek out the right cost
In addition they spend time defining pre the trip using hotel and LTB sites so that know what they are doing

I spend some time planning…checking what is about - comparing to other places and see what they have and then of course the all important cost

I didn’t investigate everything once…never do that again…we were at a caravan site in the middle of nowhere, Selsey! and had got the train down…couldn’t do a thing and kids got in a mood
Lot of sharing with this audience when get back

They love to share their experiences, their family photos

This can be on the go / hoof
  – through FB on phones (or lap tops if take them on hols)

But more typically when they get back
  – this does seem to be more the mums than the dads
• OFs life has become about balance between their own needs and their needs of older kids
  – helping their kids develop / learn / have fun etc
  – but also many invest time in selves as well
    • their own growth / learning
    • giving something back to society

• Impacts on what want from holiday / short trip and the demands they put on info sources

• In general seem a digitally connected group
  – through their own professional lives
  – through their social groups
  – or to keep up with their kids
OFs all about bonding /sharing or escaping!!

• Two types of trips for OFs

**Family Trip**
- providing opportunities to bond / experience things together as family (e.g. camping)
- to give kids tonnes of activities to do
- **to show/ demonstrate where perhaps they went as kids**
- learning / doing something together as a family

**Adult Only Trip**
- to escape responsibilities a little
- to learn / grow / explore and discover
- to embrace a hobby/ interest
- to do stuff that kids wouldn't find interesting
OF's decent knowledge of the country

- For family trips eyes do seem most typically to be abroad
- However they also have strong desires …
  - to do the nostalgia thing with their kids
  - to educate and inform them about the country live in
- Adult trips often about getting to know the country better
  - to build on their knowledge
  - (and to escape and relax)

As a kid all I knew was holidays in Bournemouth and I love being around the seaside here… My son as a kid all he knew was Greece and Spain and I now wanted him to get involved here

They have started to talk to me again now but this summer I thought we could all go camping as a family

You forget about what's on your doorstep… I have never been to Shakespeare country… I have been around the world but never been to Stratford
• Typically OFs on look out for ideas
  – particular for away days
    • something new / different / exciting
  – adult trips
• For family holidays / trips constrained re when can take them
• Yet they are very important
  – making most of the time with their kids as they get older
• As such from being inspired onwards info journey very engaged, conscious process
Mix of active and passive inspirations

TV Docs and Ads

WOM offline chats with other parents

Residual knowledge from their youth

Google - lead by idea of location (often haven't been)

SM Word of mouth (see something on Facebook)

Groupon / Newsletter (more for adult trips)

Newspapers
OFs know about the country, they like to bond and escape!

When you get to our age you kind of know what's in your mind, you know what is around in England, you have memories of your youth and you kind of want to show the kids that. To share.

Our boys didn’t want to come on this trip with us and I got this offer through from Groupon for a hotel in Cornwall. It was near the Eden project.

I think it very important to have good fun times out with the family. It is the only time we really have to be together.

You do forget about what is on your own doorstep. I'd never been to Shakespeare country. I have been around the world but never been there.
• OFs take time over comparisons and booking
• Price is important (but seem less so vs. YFs)
• They seem to spend a lot of time on scoping a potential holiday/conceptualising the idea
  – what to do and when
• But seem to be stronger in initial convictions vs YFs
  – so spend less time on comparisons
• Given that seeking to make most if time pre trip defining very important to OFs
• On family trips they want to get the most out of every second with their kids
  – to have opportunities to bond with them
  – to have Plan B in case of the weather
  – to have alternative activities in case of boredom
  – to know where eat and drink
• For their non kid trips equally they want to make the most out of them so will spend considerable time defining
• As with other audiences on the hoof is emerging
• Previously they were a target that made most of the leaflets for alternative options
• Now despite a lot of defining occurring before they will be open to new options
  – using leaflets
  – or apps!
• They also seem a group that would be likely to ask questions of hotel staff
  – to get the most out of their trip!
OFS share both physically and digitally

- Sense OFs do tell others about their trips physically
  - other parents
- In addition some might use Facebook to share photos
  - seems to be more post the trip than on it
Empty Nesters love to short trip

- ENs short trips/breaks crucial in lives
- Like to make the most of them
- But do this in different ways…

**Puritanical Planners**
- Plan exhaustively prior to trip
- When, where, why and what to do all pre-imagined and scoped out
- Can prep months in advance

**Open Road Libertines**
- May have a locale in mind but like idea of open road
- Exploring and moving from place to place
- Enjoy the freedom of being without the kids

Expect weight of audience
Learning & discovery  EN's common needs

- EN get a buzz from exploring
  - to discover new things
  - to take part in different activities
  - to learn
- It seems all about history, culture, interesting shops, food
- And for some a good dose of relaxation
- Love to share these stories /to recommend and advise
  - typically this is done f2f but not always

This country is great. Just down the road is something exciting and interesting to learn about

We went to the Black County Museum and it was a bit of a thrill as we didn’t know that about this country
EN's know a lot about England as place to visit

• Typically they know a lot about country
• They have grasp where things are and what might be there
• They have been to a lot of places
  – but are not averse to going back to explore in greater depth
• They are open to going to new places too
• Although have preferences which they will return to time and again

A few years ago we got in the car and drove to Cornwall we didn’t have anywhere to stay but we found a hotel and have been going back every year since

Hadn’t been to the Peak District but had always intended to go as my father was from there…. I knew there was plenty to see and do so we checked out the Barceló website
EN's very mixed re social media

• Some are social media lovers
  – stay in touch with friends and family
  – using variety of sources to help in trips (TA to Groupon to even twitter!)

• Whereas others can be dismissive
  – claim can’t see point
  – yet might still use TA to check the 'bad reviews'

• Interestingly social media involvement for this audience seems independent of tech literacy
EN info journey focussed on comparing conceptualising & defining

- Inspiration
- Conceptualisation
- Comparison
- Price and book
- Defining (Pre trip)
- On the hoof
- Sharing back at the ranch

Importance

libertines
ENs create space for inspiration

- They actively engage in seeking out inspiration
- This is often around things want to learn, see and do
  - whether these be new experiences
  - or reliving, augmenting previous ones
- As consequence their inspiration can be both verbal & visual (vs PF)

It’s time for a holiday and I am a bit old fashioned and I get the map out and see where we haven’t been

I read in the papers and they give you ideas of places to go and all the things that you can do around them
EN: Inspiration both active & passive

Knowledge

TV shows (ads)

WOM offline

Newspapers

Google (for R&R/spas)

Hotel Newsletter / Group On
I have people whose opinion I respect and I might use them...the guy next to me at work had been to Torquay and I asked him if the Shirley Towers were still there,...he showed me a photo of them on his phone.

I have to admit it can be TV shows you see somewhere nice and think ooh that would be good place to go.

I know a fair bit about this country so it is really a sense of where haven’t we been and what’s there.

If I fancy a spa break because I need a change I go on to Google and click spa breaks to see what it comes up with.
EN: Puritanical Planners take time on comparing, conceptualizing trip

- Very thorough in this regard
- Once have an idea there is a lot of comparing / back checking
- Will use Google to see what is around
  - forums
  - local tourist sites
  - hotel sites
- Will use TripAdvisor taking greater heed of the negative posts
- (Open Road Libertines will get in the car and go)
EN planners: considerable time will be spent pre trip defining

• EN planners are seeking to get most out of trip so will use variety of sources
• Google will be the prime source
• But will also use libraries, Trip Advisor, forums and LTBs sites
• They may ask friends in the areas what to do – or those that they know have been
• As such by time get there they can have a pretty defined idea of what will do
• (Libertines of course may just have the first night sorted)
Although many ENs have plans getting info on hoof increasing

- Even Puritanical Planning Empty Nesters do a lot more on hoof than they initially realise
  - Libertines is all about living on the hoof

The leaflets in hotels

Using smart phones/tablets
Maps; restaurants; booking confirmations

Talking to people
Hotel staff, locals, other holiday makers

Augmenting and optimising their experience so they discover and learn more

(The 09 prophecy is fulfilled perhaps a lot sooner and with a much broader audience than we thought!)
Sharing for most ENs much more verbal & face to face (vs virtual)

- Empty Nesters tend not to like share or broadcast where they are.
- For them more about telling stories post the event  
  - Photos (pictures) become back up to the spoken narrative.
- They tend to be much more face to face in this regard (vs other audiences).
- Although the social media more enthusiastic may upload images.
Shallow vs Committeds less meaningful vs lifestage (&SM enlightenment?)

• Shallow - Committed continuum relevant to some extent
  – can have different info / inspiration needs
• But clear sense that Lifestage more powerful consideration
  – and really governed what needs / wants and behaviours were
  – i.e. the reason for being Shallow or Committed is as a consequence of Lifestage
• As such suspect will be more useful to use lifestage as lead parameter
Final Points to Ponder
Final Points to Ponder

1. 7 steps still true… with the 3 data periods (insemination, cultivation and dissemination)… Key to manage, utilise & optimise these periods

2. Huge changes in digital space. As moving so fast must continually observe and respond but most importantly be in position to predict

3. Get Google right!
Final Points to Ponder

4

Drive active inspiration by managing content of active spaces
Drive passive inspiration by creating powerful, interruptive and evocative comms.

5

Future is mobile... an app?

6

People do not live on line & off line but have integrated existences... integrated existences require integrated strategies