

The Staycation: State of Play 2013 & Beyond

Qualitative Research Findings
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Flow through the document

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Context – Then and Now

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Aims and Method



To deep dive re recession's effects on behaviour and its impact on future intentions around 5 key silos of insight

Overall orientations to general climate and impacts on attitudes, behaviours and perceptions to discretionary spend

Look back on behavioural & perceptual change re holidaying/ short breaking as consequence of downturn per se and specifically England vs abroad

Food for thought moving forward as the economic climate changes

How have experiences of England been and how have these experiences impacted on future intentions

What are people feeling about the future and how will their behaviours subsequently change

What can the English tourist industry do to keep the domestic tourist' pound in England

A Small Scale Qualitative Programme

- 4 group discussions conducted November 2013

	Pre Family	Family	Empty Nesters
Slough	1 x C2D		1 x BC1
Manchester	1 x BC1	1 x C2D	

- All key decision makers
- All holidayed in England more in last few years as result of downturn
- Mix of future intentions (whether more England, undecided or back to abroad)

A caveat

- Small scale programme to inform future quantitative study
- All preselected for holidaying more in England of late
- **As such the findings contained within should be handled with care**

Context – Then and Now



Recession touched peoples' lives much more than many could imagine

- The effects were real and deep felt for many
- Several of our sample had lost jobs or members of family lost jobs
- Several had had to take 2nd and 3rd jobs to make ends meet
- The self-employed incomes had shrunk
- Money became much more scarce than felt would at onset
- People felt and many still feel highly pressured, stressed, downbeat
- But many also thankful don't live in Spain, Italy or Greece... other places are worse

Sense the impact much more profound and wide spread than many would have imagined in 2008

There were demographic nuances

- Clear that C2D felt effects much more profoundly
 - Personally and within their social networks
 - Behavioural change more dramatic
 - Attitudes much stronger /forceful
- Some younger members of our sample felt that they had known only recession in their working lives
 - Particularly if left college /education during the recession

“To be honest I have never known anything other than recession ... I had to go to Oz as there were no jobs...think it’s better now...or getting better”

“It hit us really bad like...I got made redundant and now I do some bookkeeping, cleaning and stuff. My husband’s self-employed and there’s just not enough work for him”

Many very real changes in behaviour to discretionary spend reported

- Discretionary spend was affected hugely across board with C2Ds hardest hit
- People had switched energy suppliers regularly
- Changed supermarket shop from Tesco's to Aldi / Lidl
- They had cut back on buying clothes or searched alternative ways of getting them
- Had sought variety of ways to enhance their entertainment
 - In home entertaining
 - Learning skills / creative hobbies
 - Accessing entertainment almost exclusively through deals, offers and promotions
- Here it is as if entertainment / leisure / pleasure had become even more important in their lives
 - investing more time in 'getting' it right despite a little less money

Resulting in two fundamental energies

- Discretionary spend was affected hugely

Frugality as a way of life

- Default setting for many has become “how can we do this cheaper”
- Utilising coupons / vouchers religiously where perhaps once didn't
- Keep closer eye on Tesco club points
- Using internet for hours to find best deal
- Even young cite Martin Lewis as modern day guru
- Some folk really enjoy this new challenge
- (of course some people this way inclined previously but has become more universal and conscious approach to life)

“It really challenged the way we think... we've really stopped waste” “Yes I agree...this Christmas the wife and me are buying each other onesies to keep the heating bills down”

Quest for value and quality

- ‘Treating’ no longer care free and decadent
- But still occurred and indeed has become almost more important
- But earnestly researched and value consistently sought
- Trying to get an extra level of comfort / luxury for the same price
- Searching for enriched more interesting / different experiences
- At a good price...

“When life's [rubbish] you need to have those little things... I took mum for a spa day away through Groupon - it was great ...but I waited for the right offer”

The money for holidays / short breaks was affected but the attitudes remained “protective”

- People felt that had to cut back on holiday spend...but sense for many the last thing to cut
- Some did feel almost a social pressure / an expectation that should not be too indulgent in terms of holiday
- Yet most still felt there was a big need for holidays, and this need is even greater in times of challenge, so didn't cut back too hard
- And emotional and intellectual investment (if not financial) actually increased... holidays became more important
- Indeed many sought new and novel approaches to ensure that they took holidays / short breaks somewhere, somehow ... across lifestage and SEG
- And this affected where they went, what they did, their approach and even how often they went (more later!)

Mass cynicism and distrust towards establishment has become the norm

- People have always been a little cynical
- But now seems more profound and heartfelt
- There is frustration and resentment towards...
 - Politicians
 - Bankers
 - Energy companies
 - (and can feel immigration issue bubbling under surface)
 - The elite
 - And the MEDIA
- On one level they believe the media has propagated the downturn...but now also don't believe what read /hear

"I am really angry and disillusioned ...we have all been (affected) but THE MAN is alright"

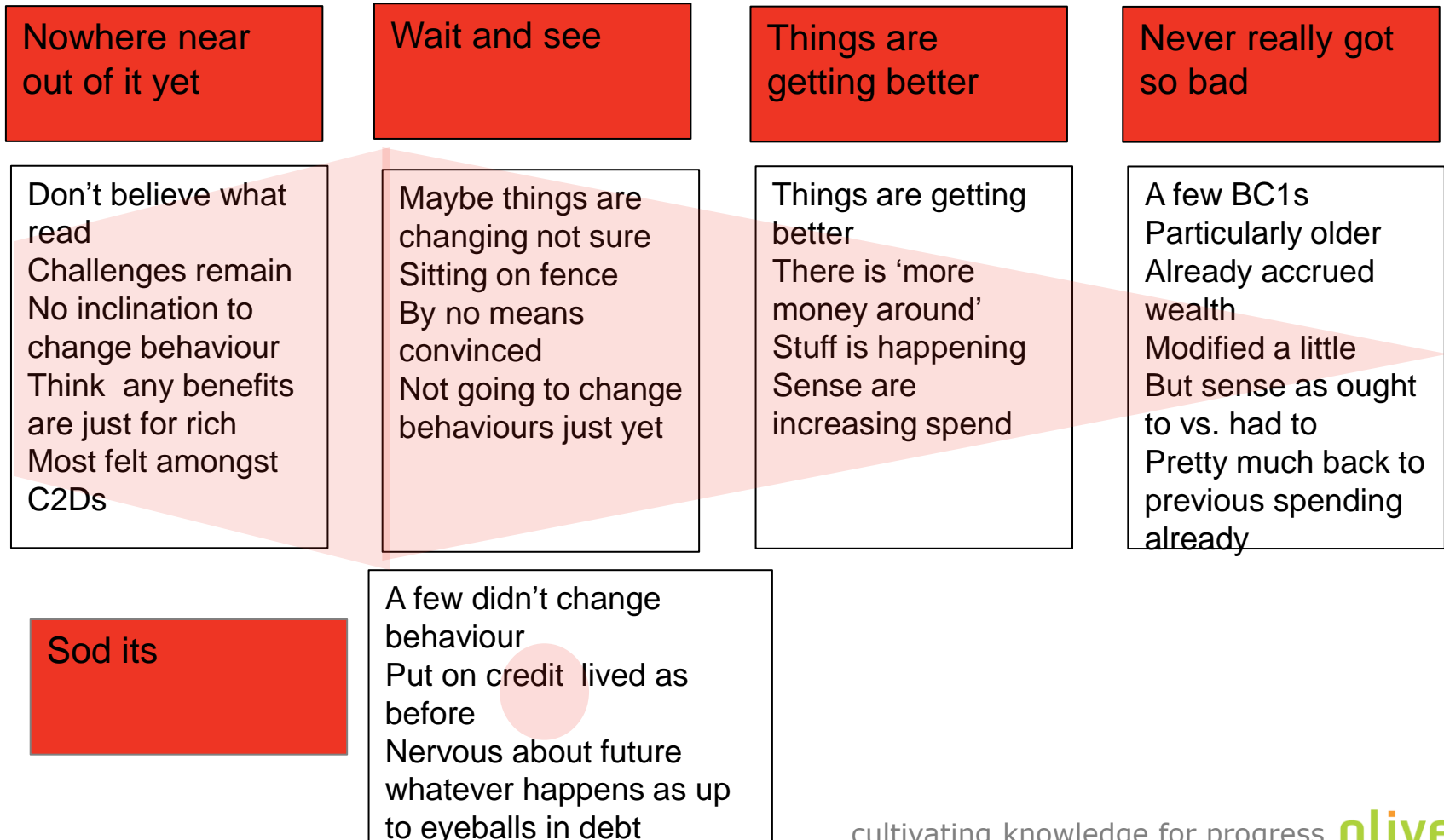
Right now many people don't know what to believe

- Aware of the 'stories' in the press of 'shoots of recovery'
- Some do feel a rising sense of optimism themselves and from families and friends
 - Particularly BC1
- However others are unsure and feel little has changed
 - Particularly C2D
 - Amongst this audience there is almost greater fear and frustration as hear stories of recovery but cannot see/feel it in their own circumstance
 - Indeed they can even feel they are getting progressively worse off
- For most there is a real sense now is a time to wait and see

"I am not seeing it... I feel the rich are getting richer and everyday things are getting more expensive and I am having to work twice as hard just to keep my head above water"

5 key mind-sets to the scenario right here and right now

- Climate still down beat, with a range of attitudes present



Beyond this sense there are also two orientations to the future

Return to
previous
behaviours

- Once the shackles removed will return to general approach to life as before
- Want to get back to more carefree approach

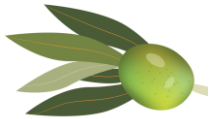
“We tightened our belts... but am sure when good times come back we’ll make the same mistakes...we never learn”

Permanent
change to
approach

- Some claim recession affected mind set permanently
- Will be more careful / prudent and frugal in future
- Have actually enjoyed new found frugality

“Bah humbug. I’ve become a right scrooge.. But to be honest I have almost enjoyed it... I think I will keep looking for those great deals!?”

Points to Ponder



Recession's impact was far greater than people imagined and resulted in profound changes in behaviour

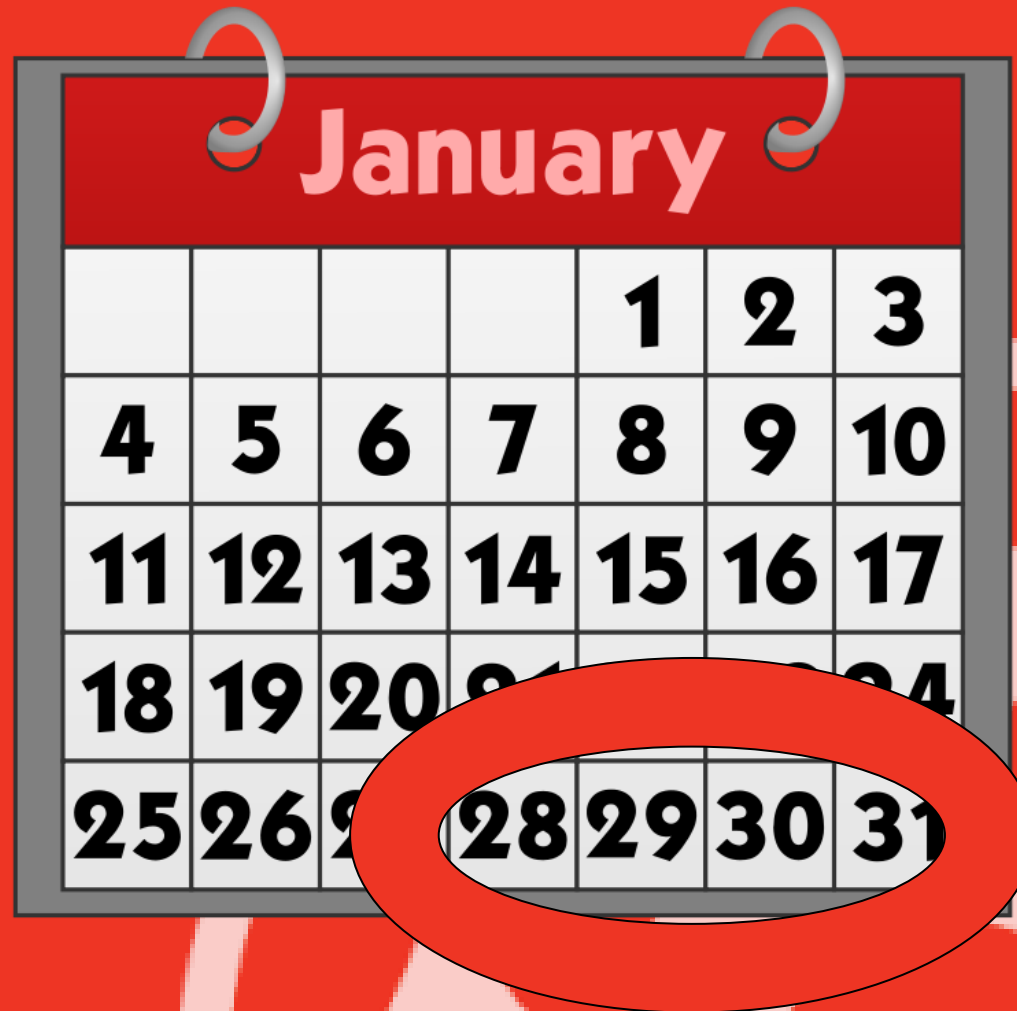


Holiday spend, and general leisure, was protected as much as could be ...but eventually the recession did impact here ... however folk did seem to put greater emphasis on protecting these areas as antidotes to the strains of everyday life



For many the recession isn't over yet. There are considerable challenges in their lives, they feel poorer and wont believe in change until see it first hand. However there are a minority who are more optimistic and see that a brighter future has begun already

How holidays and short breaks changed



10 things that shaped holidays and short breaks in the recession

- The increasing need for a break from reality
- The concern about being away too long
- The rise of risk aversion
- The rise and rise of the short break
- The reduction in enthusiasm of short trips to Europe
- The search for quality and value
- And the resultant increase in breaks in England
- The ever proliferation of routes to inspiration
- The search for creative ways to reduce cost
- The Planning vs Last Minute Dynamic
- (Threats to the Day Trip)

The increasing need for a break from reality

- Life has been tough, downbeat, stressful and pressured
- As such folk have sought relief from these pains
- As seen there has been more intellectual and emotional investment in leisure and pleasure (if not actual financial spend)
- And consequently an increase in frequency for many of breaks
- i.e. to spread the 'medicine' over time vs seeking an antidote all in one go

For many there is sense the recession has meant can't be away too long

- People have felt pressure not to take trips for too long, or too far away, for two reasons...

Social Pressure

- Almost expected not to be too decadent
- Can't be seen to be too cavalier /frivolous / care free

"It doesn't feel right spending too much on holiday just now"

Physical Proximity

- Real need to be close to work
- If self-employed can't be away too long or too far away in case something comes in
- If employed need to cover /protect selves as duty bound to be close at hand and the pressure to keep the job they have

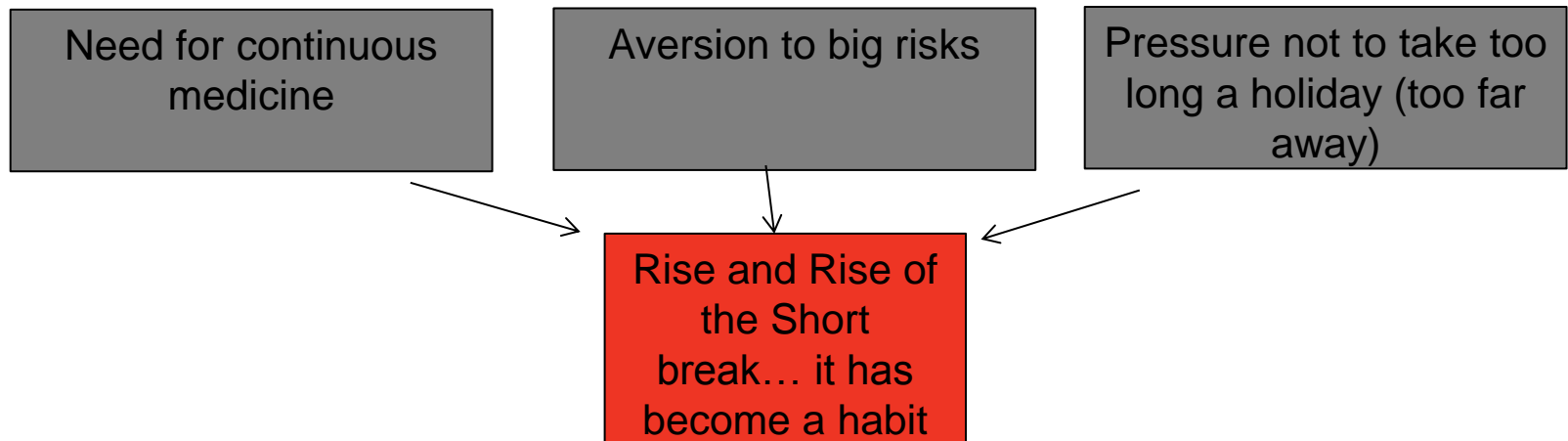
"I am self-employed... I can't be away for more than 5 days in case a job comes in.. If you're not here to do it you wont be asked again"

A more risk averse climate

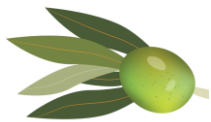
- Leisure and pleasure time and money has become more important
- Many feel can't afford to spend unwisely as most important thing in lives
 - The antidote to the daily challenges and woes
- As such don't want to...
 - Over invest in something in case doesn't work out
 - Take too much of gamble in terms of time and money

“You know you don't want to put all your eggs in one basket... you want to spread the risk so to speak”

The rise and rise of the short break



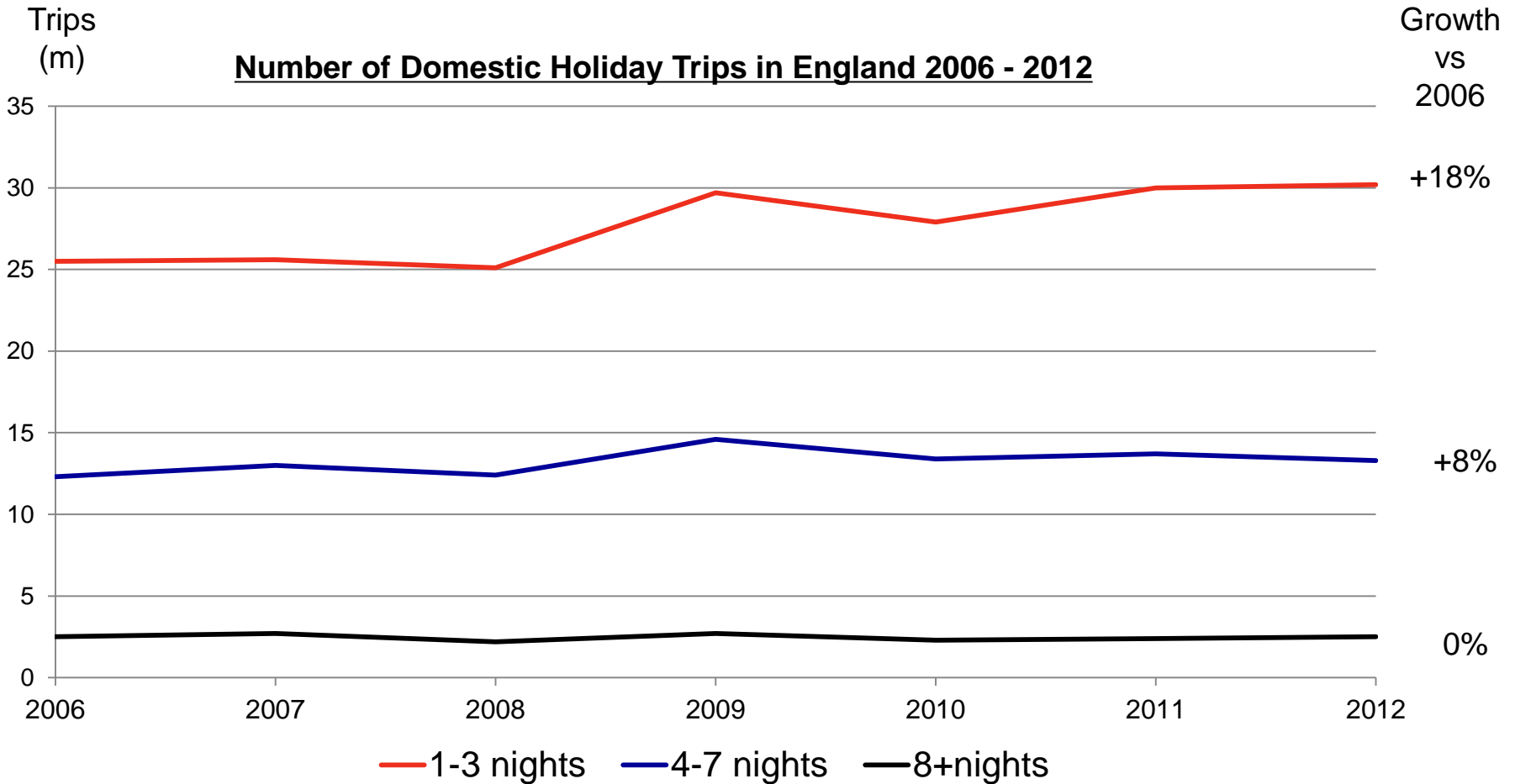
- 3-5 days vs full weeks /10 days / 2 weeks
- Can be taken over bank holidays so cost even less in terms of days off work
- As consequence trips taken more frequently
- Less risk involved as less overall investment
- Can get back easily / quickly if have to



Knowledge Fruit

Crucially here although this approach may have been forced upon them they seem to enjoy it (and indeed can prefer to previous habits)

Supported by other research with these 1-3 night breaks being seen as the driver of the “staycation”



The reduction in enthusiasm of short trips to Europe

- Across sample there does seem to be a level of frustration with short breaks to Europe
- Real sense low cost airlines not the 'elixir' once were
 - Out and out hatred of Ryan Air for many
- But also...
 - The general hassle of airports
 - The time it actually takes to get door to door
 - The lack of freedom (vs UK trip)
 - That no longer cheap than once the case (Eurozone)
 - Here whether awareness of exchange rate or not the feeling is not as cheap
 - And some very aware of exchange rate
 - Air travel less cheap
- And actually when compared to UK (sic) offer is not so spectacular (beyond the 'great' cities: i.e. Barca; Prague; Paris etc)

In their own written word...

Overseas holidays are too stressful! All the problems getting to and through the airport. Strict limits on what and how much you can take. Then cramped into aeroplane seats with little legroom or space to be comfortable.

Short breaks in England avoid the above and a good choice of special offers make it more economic. Also, if you don't like where you are you can always move on or go back home.

Sitting on a beach covered in sun block in a Benidorm like resort is not how I want to spend my time or money.

The search for quality and value

- One of the key things to emerge is that it is not about just being cheap ... **although cheap is important (and key to C2Ds)**
- But people have still sought quality times
- Indeed the holiday/short break is the time when seek that extra bit of luxury / comfort and treat cost effectively
- They sought times where did more / experienced more and saw more
 - Or upgraded their life a little
- As such when considering a trip / holiday they have often sought ways of achieving this
 - Whether this be coupons / deals / promos
 - Or different approaches e.g. self catering with friends but in a boutique / 'grand designs' cottage; extending 'duty trips' (i.e. weddings, VFR etc)
 - Researched / planned things to see and do to optimise the time spent

And the result is an increase in breaks in England

- Sense all these factors from pressure to take short breaks; less enthusiasm for Europe and search for value / quality had resulted in increased trips in this country

Rationally

- Can control expenditure more
- If beginning to overspend can reign it in quicker
- Know how to cut back and control
- Whole thing more predictable
- Closer / more accessible if needed back at work / job comes in

Emotionally

- Feels less indulgent
- Get better value as can have more experiences / more things to do
- Can really bond with others. *“You talk more”*
- In times of strife something comforting in nostalgia’... retracing the good times of the past

In their own hand...



Black Pool as my son loves coming here and its close to all the amenities. We was happy because we didn't spend as much as we would of abroad and love the memories of my son riding the donkeys as a toddler

Due to finances and amount of holiday days we have stayed closer to home in the UK. It's a shorter travel distance and means we can make most of a long weekend rather than taking a whole week off. It tends to land fri-mon and means we can have more short holidays rather than longer ones. It is also perceived cheaper, I say perceived as often London can be as expensive as a week abroad, however trips to the north east are more cost effective, especially when shared with friends or family. Self catered is usually my preference and provides more flexibility in the UK.

With the current economic climate myself and my partner decided that we would try somewhere closer to home to see if we could save that little bit of extra money but still take nice, affordable breaks. we would automatically be drawn towards heading abroad when looking for a break but so far we have discovered some really interesting places within the UK that we otherwise would not have visited. **Brighton:** went there in May for the wknd for the Great Escape Festival. brilliant weekend. unbelievable weather, cheap but very presentable accommodation in a great location and everyone was incredibly friendly. would advise anyone to for a lively weekend away.



The proliferation of routes to inspiration

- The usual suspects of course prevalent in stimulating
 - Word of Mouth/the papers (in particular Sun deals / TV etc)
- But across social class and lifestage social media and in particular newsletters and other calls to action increasingly important in the downturn
 - Facebook discounts
 - Groupon ; Wowcher
 - Taste card etc.
- Again things that are enabling access to that bit of extra quality and value
- They are driving the macro energy of 'deal nation'... this seems to be here to stay

Become a habit

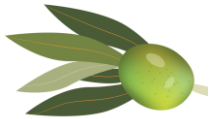
The Planning vs Last Minute

- Within sample very different mind sets re planning vs last minute as a result of the recession
- Some (more BC1) really liked to plan the short breaks throughout the year and some time in advance (and everything about them)
 - This enabled there always to be something to look forward to
 - But also they felt accessing things at a cheaper price
- However others felt as result of recession they were having to leave everything a little more last minute (more C2D)
 - Didn't know how much money they would have at any one time
 - Didn't know whether needed at work / whether made redundant or not
 - BUT also felt that could access things cheaper... e.g. hotels under pressure to fill rooms etc. if leave until last minute

Threats to the day trip?

- One of repercussions of downturn & resultant increase in emphasis of short break was perceived reduction in day trips
 - This anecdotally seemed more pronounced in South than North
- There was a sense that as increasing frequency of trips that there was less need
- And if going to invest time and money can get more 'value' from staying a night or two than just a day
 - As by time got in car got to place almost time to come home
 - And already spent a fortune
- Less case in South Manchester (than Slough) as felt they could access decent day trips very easily
 - 50 mins from door to door to North Wales beaches
 - Peak district short bus trip away

Points to Ponder



The recession resulted in people making more emotional and intellectual investment in their holidays and short breaks as they are the antidote to life's challenges



The recession creates time and cost pressures and also has meant folk have become more risk averse. In addition there is a sense that European breaks are a little less attractive as result of the hassles of getting there and cost



The recession thus resulted for this audience in more English short breaks taken as cost can be controlled; value sought easily and they are more accessible (and less risky)... BUT what did people think of the experience?



The England Experience



In all positive experiences but there are challenges

Positive experiences

- Rich and diverse
- Quality
- Better value
- Accessible and easy
- Nostalgic

Challenges

- Defensive psycholinguistics
- The weather risk
- When say England mean UK



Peoples' holidays / short breaks in England in general terms met expectations or exceeded them

- Across our sample most had enjoyed their trips in England
- Some already were positively inclined
 - Many older
 - But also some younger who had been 'educated' on trips in their country by family previously
- At very least they had enjoyed them as much as they expected
- But many had been surprised and enjoyed more
 - Notably those who had subbed in for trips abroad
 - Many C2D families who had been surprised and seemed to have less hassle and more reward than a trip abroad

Holidays in England are very different beasts vs abroad...potentially 'richer' and more diverse

- There is a real sense that holidays in England are almost a different animal than abroad
- Many tended to DO more, pursuing more unique and diverse things in England
- As result of a number of influencers...
 - The weather means have to find out more
 - Have greater confidence because speak the language and understand the culture
 - Perception that there is actually more to do
- As such return from the trip feeling different
 - Relaxed but also stimulated and energised

But Holidays in England tend to be apologised for

- The psycholinguistics associated with the construct of going on holiday in England are muted
- The words are defensive even apologetic
- Many people do use words like 'just' and 'only' to describe their trips
 - Particularly those who subbed in an England trip for abroad
- This behaviour and justification feels appropriate in the current climate, I.e. the need for restraint / sacrifice
- But if things do get better in reality this would be a concern?
 - And it doesn't match their experiences or the reward they feel when they do holiday in England which aren't 'just' and 'only' experiences

There is always the weather risk of taking longer break

- Our sample felt that trips to England are more suited to shorter trips
- On one level it is more worthwhile doing a shorter trip in England as the commitment and risk is potentially less than going abroad
- But also given the variable weather there is more risk involved in England
- Folk feel can still have a good time over a few days of bad weather as can find things to see and do (and could always come home without forfeiting too much)
- But if poor weather lasts over a prolonged period and they have made commitment to a long English holiday then challenges do emerge

England does deliver on the nostalgia ... but is this wholly a good thing?

- Beyond this, there is a sense of a bit of positive nostalgia associated with trips in England
- Many families speak of sharing time with their kids in places where they shared times with their parents
- Sense this search for warm nostalgia is a typical response in times of challenge and need
- This could of course be a challenge as things improve and people have less need for this emotional / reassuring comfort blanket



The newcastle photo sums up my sharing of my university experience with my fiancé. I love the north east and the Tyne bridge resonates with this feeling!



"I don't know it's nice.. You feel a bit down and you go to these places you went with your folks and well life was so much simpler then ... it's nice to show your kids these things too"

People talk of increasing prevalence of quality accommodation and food

- Sense perceptions of accommodation is improving
- This seems to be led by people searching/ or getting inspired to go to more interesting spaces
 - Whether ‘grand design’ style self catering cottages amongst a group of friends
 - Glamping
 - Luxury / boutique spas (at discounts!)
 - Or traditional B&Bs
 - some advocates for ‘surprisingly good’ youth hostels
- In addition generally felt that food and beverage quality improving
 - With increasing value for money
 - Deals searched for and accessed (e.g. Taste card)

Have found cheaper ways of experiencing

Real sense English holidays / short breaks are not as 'expensive' as once the case

- Previously English holidays considered expensive when compared to abroad
- But by using creative ways people are getting greater value for their English holidays
 - Grouping together for accommodation
 - Accessing things through Groupon
- There is a sense that folk also have greater confidence in accessing better value in England than they do abroad
- In addition Europe has become increasingly expensive
 - The price of beer in Spain is no longer so different than 'here'
 - The Euro is now 1:1 as opposed 1 to 1.6

There is a certain ease of a holiday in England

- A fairly strong energy reported in the groups was the sense of ease of holidaying in England
- This is well suited to the recent economic climate
- In that life is stressful, full of anxiety and they do not wish to have such feelings in their leisure and travel time
- As such they can simply jump in the car and go for a break
 - Without too much emotional or intellectual commitment (vs braving the airport)

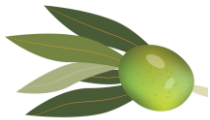


Much more convenient than flying, come go at own convenience, no passports or queues. A really good reason to holiday in England.

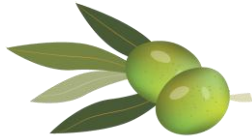
As previously found in research English people tend to think of UK as England and England as UK

- An English holiday is almost a false construct to people in England
- They talk of holidays in 'my country' and they mean UK
 - Manchester in particular think Wales
 - Broadly Scottish cities are discussed in same breadth as English holidays... "My trip to Edinburgh..."
- When challenged sense there maybe nuances of difference with some specific locations
- E.g. Scotland non cities do feel a little different and exotic
 - A bit more of a 'foreign country'
 - But also accessible so would compete with an 'English' trip but might seem a little more exotic ...for those needing a greater change
- But in all holidaying in England for English means holidaying in GB (at least right now this may change as the recession vote nears)

Points to Ponder



People can still be a little defensive of going on holiday in England ... using defensive / apologetic psycholinguistics



But the England experience has been good. People have enjoyed their trips and their eyes have been opened (although some were already strong advocates)



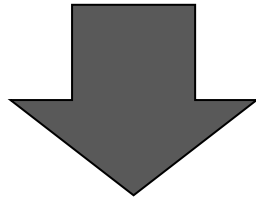
Sense that England is better value than were expecting, offering different types of trips to abroad but rewarding in their own right. They have been creative in seeking this value. But what of the future...?

The Future



The Future: People DON'T KNOW more now than ever

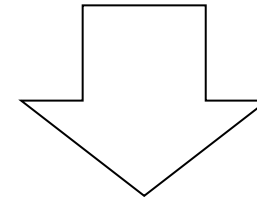
As of Nov 2013 MOST really unsure what future holds



- They can't see the behaviours changing any time soon
- They are still too worried about making ends meet
- Are not seeing any changes in their situation

- Find impossible to imagine a different future
- Too caught up in present

A Small minority (Mainly BC1) more optimistic



- Thinking about having more money next year
- Starting to plan / get ideas
- Both UK and abroad

- More easy for them to imagine future and changes
- But even here still difficult to imagine exactly what will happen

If change does happen there is a mix of future intentions

Generally right now the jury is out
...but if things are truly improving
there is a mix of future attitudes

Return to longer holidays abroad

- Were previously more abroad focused and still where heart lies
- So when money less tight desperate to get away again
- This will be treat or even reward for getting through the bad times
- But even here do appreciate England more than pre recession and feel will be more prevalent part of repertoire

Keeping the short break habit mixing England and abroad

- Have really appreciated new 'method' of holidaying
- Could potential be permanent change
- Spreading the pleasure and the risk
- Enabling more deeper /richer experiences
- Here England will be part of repertoire but will also consider abroad more readily than currently do
- Typically already appreciated England as destination pre recession

England now much more integral in repertoire

- Hadn't realised what good option England was before
- Will holiday more in England as result of less hassle and more to offer than imagined
- And feel different vs abroad
- Want to explore and know more
- So will short break even more in England

So in general England has become a bit of a habit and it is more on folks' lists

- In all sense across the sample England as potential holiday / short break has raised in salience / prominence
- Many, even those who will return to taking holidays abroad, have England higher up on their consideration list
- Particularly vs short breaks /long weekends in Europe beyond the 'superstar' cities
- As England offers ...
 - Experiences that are less hassle
 - Greater emotional freedom
 - Richer / deeper experiences with less emotional and financial (or at least greater control of) cost

Primarily the increase in the short break may well be a mid term trend

- People appreciated the new habits formed of taking more short breaks
- It gave them greater diversity of experience and spread the pleasure in lots of small chunks
- Many think they may well keep this approach moving forward irrespective of whether there is up turn as they see the benefits
- It will be important to see whether this is indeed true over time or do people slip back into the traditional long holiday and a few short breaks pattern

They want to discover and access England further and experiment more

- There is a real sense that many want to see more of their country given their positive recent experience
- They want to find new different places
- They want to experiment a little more
- Sense some of the 'lost generation' (i.e. pre family) have greater confidence and willing to challenge themselves a bit more

People seem to have greater confidence in holidaying in England, particularly pre families... has 'lost generation' been found?

- Where once they didn't know about their country know they have a feel of the types of things they can see and do
- They have greater confidence to see do and experience more
- They potentially will seek even more creative England based holiday solutions
 - New places; new things to do; new types of places to stay in; more unusual
 - Using new sources of information and ways to inspire
 - And ways of making possible (group sharing; transport and accommodation options; extending other duties)
- It's as if the downturn had encouraged them to think creatively in terms of their trips from inception to experience
 - and they liked it

The challenge will be to maintain the interest

- As belts begin to loosen the challenge will be to keep interest
- Sense that many will be vulnerable to encouragement to return to previous habits of going back to abroad
 - And some are already feeling the real need
 - They want to reward themselves for getting through the recession
- They need to continually have ideas ceded by England to have calls to action
- They need their new found frugality and hunger for greater value to be continually appealed to

What does the future entail?

We will definitely be taking more weekend or overnight breaks as a couple and the children will stay with my parents. We will source this by word of mouth or deal websites but we will definitely still go back to abroad once a year as the one thing lacking in this country is guaranteed sunshine.

I do like foreign holidays, But the cost to go during kids holidays is a bit too expensive. I am hoping to go abroad next year. The kids are a bit older now so would probably remember it better, As most holidays I did as a very young child I can't remember anyway.

We have decided that over the next few years we will probably split our breaks within the UK and abroad. Both holidays have their pros and cons i.e. we will still travel abroad for the weather, but there are a lot of places for us to still discover within England so we're looking forward to a few more breaks closer to home.

Society becoming ever more deal driven but not just about cheap

- 4 types of deal / promotion of 2008 still ring true

Enabling

- To access what can't afford
- 2 for 1 / free nights

Self justifying

- Any form of deal so can justify expense to self

Stimulating

- To encourage when weren't considering
- E.g. interesting packages that hook around theme/region

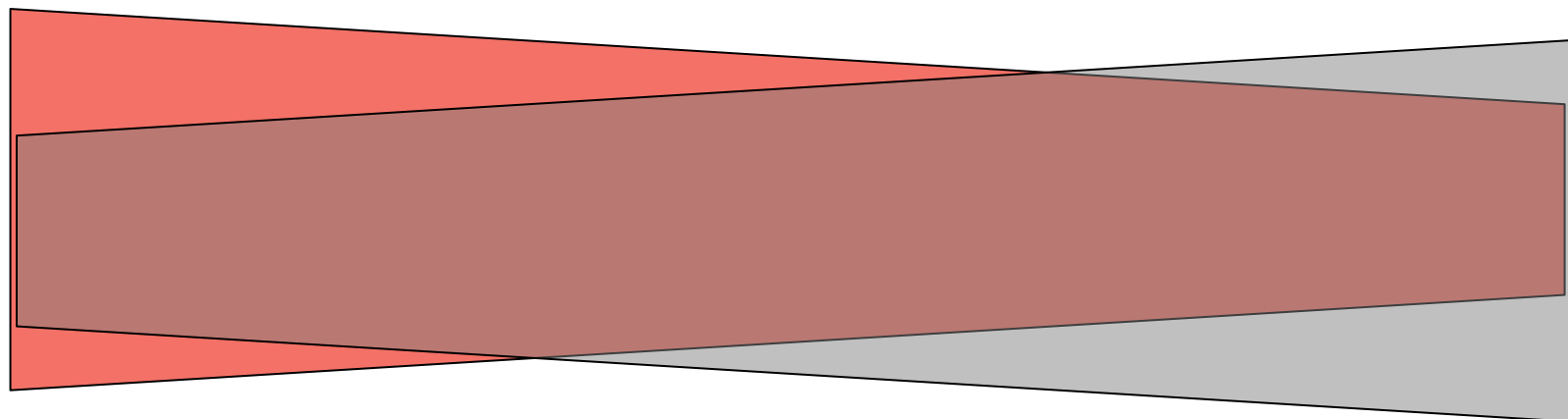
Enhancing

- Allows treat/decadence/ extra quality
- E.g. up grades / gifts / add-ons / free meals

Historically Enabling had perhaps been more C2D and Enhancing more BC1. But all 4 deal types became more age and class neutral during down turn

Volume turned up or down on each type depending on whether in recession or coming out of one

- I.e. Recession all about Enabling... as come out Stimulating and Enhancing



Self justifying

Enabling

Stimulating

Enhancing

Relative weight of
importance in
Recession

Relative weight of
importance in
Recovery

Some examples in their own words...

Enabling

"We couldn't afford to go to Devon but cottage did a half price deal. We got Tesco direct to deliver our groceries there... it meant we could afford to go"

Self justifying

"I needed a break and we got an extra night free at the hotel. It made it worth it"

Stimulating

"You need ideas...I love history... be good to have a theme, a history theme or something like that in a region...castles, battlefields and stuff"

Enhancing

"They should have deals where can get a discount at a nice restaurant in town with a hotel and maybe an activity. So you can get the most out of your trip"

6 things that might happen as a result of the recovery

The change in pattern to several smaller holidays vs. one long one and a couple of shorter ones as get greatest value from holiday time

A real opportunity for England to exploit with innovative short breaks

Potentially there will be spike of big longer holidays as a reward for getting through the recession

Be prepared. If economy gets better many will seek to reward themselves with big trips that been holding back on

For most England put higher up on list and will remain at least in mid term as the realisation that can have different types of break that are energising and rewarding

Don't sit back on laurels...exploit and optimise this good will...change an enforced behavioral blip into a good habit

The continued search for creative solutions both in nature of trips and how to access whether this be by extending commitments; utilising friends and family or going in groups for self catering

Continue to innovate the offer and ways that can be accessed

Search for even more deals

Continue to be creative and innovative in the deals offered

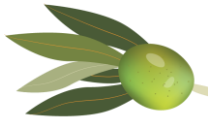
The ever increasing rise of importance of food and 'novel accommodation as people appreciate England's offer more

Do more and more around food and accessing interesting /diverse accommodation

The Knowledge Fruit



The Knowledge Fruit



For many the downturn is not yet over. As of November 2013 it is very much wait and see. This is particularly the case for C2Ds who are not feeling the benefits of the up turn, feeling it applies to others

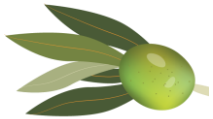


The downturn caused massive changes in behaviour and attitudes. Sense that people have become more frugal and demanding of value for money. These may well be long term behavioural and attitudinal changes



With respect to holidaying the recession has seen the rise of the short break and the staycation as people want to spread the antidote; manage the risk; get the most from their money and not to overcommit emotionally, physically and financially

The Knowledge Fruit



Folk have enjoyed their extra holidays to England feeling often they delivered more than expected. In particular Pre families seem to have found a new level confidence. They were lost but now they're found.



However the future is unclear. Quite simply most do not know what will happen. Mid term it does feel that many will keep the increasing number of short breaks and England will be part of these. However many will also want to reward themselves for making it through the recession with big long trip abroad



If the up turn does impact positively on peoples' lives in real terms sense that deals will still be prominent as people seek to creatively enjoy England with their new found confidence ...in particular those deals that deliver Enhanced trips or Stimulate them into new and different experiences

VisitEngland 

Thank You

The Olive Insight Team

