

Tourism

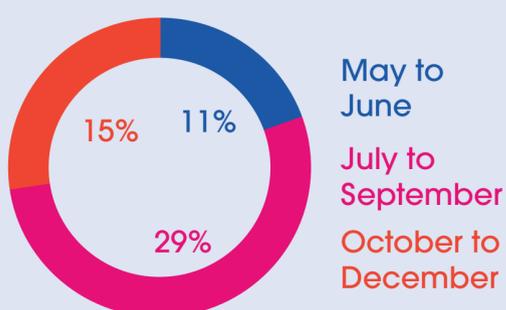
by

Panelbase



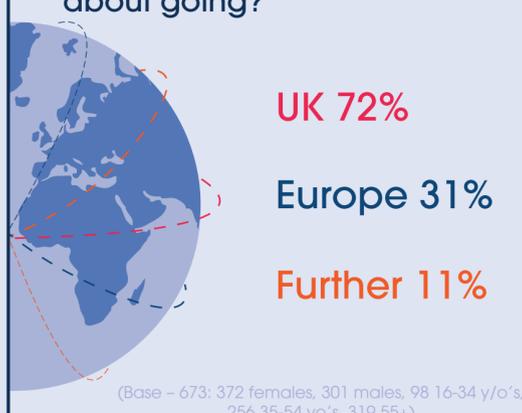
MINIPOLL™ QUESTIONS

Are you planning on going away this year?



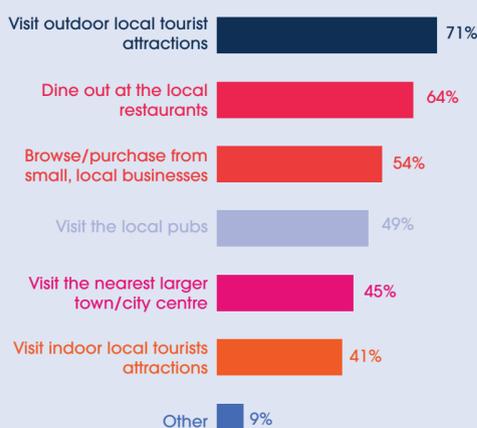
(Base – 1,674: 933 females, 738 males, 210 16-34 y/o's, 607 35-54 y/o's, 857 55+)

Where are you thinking about going?



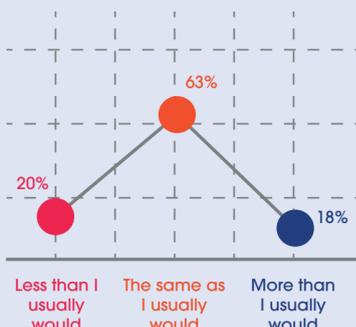
(Base – 673: 372 females, 301 males, 98 16-34 y/o's, 256 35-54 yo's, 319 55+)

Which, if any of the following are you looking to do while away?



(Base – 477: 264 females, 213 males, 61 16-34 y/o's, 189 35-54 y/o's, 227 55+)

How much are you planning on spending while you're away?



(Base – 477: 264 females, 213 males, 61 16-34 y/o's, 189 35-54 y/o's, 227 55+)

Our MiniPoll™ tool allows us to quickly find out opinions of our panelists, and is an effective way for us to calculate incidence rates for surveys.

Key Take Outs:

Unsurprisingly, the most popular holiday location for our respondents this year is within the UK (72%). Despite this 2021 UK "staycation" boom, just over one third of all respondents (31%) were keen to holiday in Europe and one in ten would travel further afield (11%). Collectively, this demonstrates that while holidaying has taken a more "staycation"-centric turn, overall respondents were open to abroad options too.

Interestingly, when we asked those looking to holiday within the UK this year which activities they were likely to participate in while away, almost three quarters of the total sample (71%) claimed they had intentions to "visit outdoor local tourism attractions" and over half of the sample were planning on dining out at the local restaurants (64%) and browse/purchase from small, local businesses (54%). This suggests that the majority of those looking to "staycation" this year, are also looking to fill their staycation with lots of local activities and eat within the local areas, inferring that UK package deals could be popular within the market.

Through our MiniPoll™, we can see that almost half of our respondents (46%) are still looking to go away this year suggesting a positive turn for the tourism industry.

This shift towards "staycations" has dramatically increased over the past 12 months, as when we asked our panellists in April 2020 "What type of holiday are you most likely to book as your next holiday", only 31% opted for "staycation/UK based" vs 72% now.

Finally, when asked how much they were intending to spend while away on their UK holiday, just over two thirds of respondents were planning on spending "the same as I usually would" (63%) implying that, regardless of the financial difficulties of the past 12 months, people who are actively looking to holiday, are looking to indulge while away as much as they would any other year.

What this means for the Travel and Tourism industry?

Overall, our MiniPoll™ suggests that holiday behaviour this year is going to be predominantly local, but with people continuing to spend the same amount as any other year, marking a prime time for Travel and Tourism brands to invest time and money into strong marketing campaigns to capitalise on this change.

Through the ONS International Passenger Survey, we can see that in 2019 UK residents travelling abroad for holidays spent £43.3 billion in 2019 and with the shift to staying and spending at home, it's the optimum time for UK tourism operators to capture and convert that spend to "home" locations.

Panelbase can work with Travel and Tourism brands to track campaign effectiveness of new ad strategies, deep dive customer research/segmentations to understand the new customers that this new post-pandemic era will attract and how to appeal to these people moving forward.