

SECONDARY RESEARCH

Short Stay Travel / City Breaks

Short and city breaks refer to overnight trips of 1-3 nights made for leisure purposes. Short breaks for business or other purposes are excluded from research.

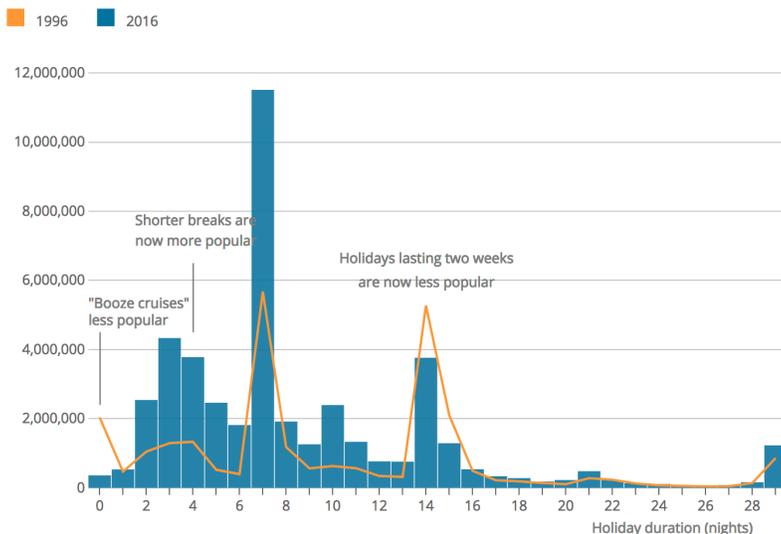
Industry Trends

Type and frequency of holidays

In the UK, Britons have ditched the traditional two-week holiday in favour of shorter breaks as no-frills airlines have taken off over the last 20 years. A review of travel trends since the mid-1990s by the Office for National Statistics highlighted a dramatic rise in the number of holidays taken by UK residents. In 2016, they went on more than 45m foreign holidays, up from 27m in 1996. That was a 68% increase, while the UK population rose by 12% in the same period.

The ONS also found that 7 and 10-day holidays had become more popular than 14-day breaks.

Duration of holidays overseas by UK residents, 1996 and 2016



Source: Travel trends: 2016, ONS

One of the most likely explanations for UK residents going on more but shorter holidays was the growth of budget airlines. Low-cost carriers are entering the long-haul market and traditional long-haul carriers are launching low-cost alternatives.

Low-cost carriers traditionally serviced short-haul destinations with quick turnarounds. However, relatively low fuel prices create opportunities in the European long-haul travel market. In the Asia-Pacific region, low-cost long-haul flights are already common. Now carriers such as Condor, Eurowings and Norwegian also connect Europe with several long-haul destinations at low rates.

In 2017, some of Europe's largest long-haul airline groups such as IAG and Air France are entering the low-cost market. At the same time, Gulf airlines are rapidly expanding their route network to service the whole of Europe at attractive rates.

Spontaneity

When leisure travelers first start thinking about a trip



78%

of leisure travelers haven't decided what airline they will travel with.



82%

of leisure travelers haven't chosen the accommodation provider they will book with.

Users are spontaneous when booking a break, with 78% of leisure travellers not deciding what airline they will travel with when they first start thinking about booking a trip, and 82% of leisure travellers having not chosen the accommodation provider they will book with.

Not only have travelers not decided on what brand they'll book with, but they don't necessarily have a destination picked out either. When first thinking about a personal trip, one in three travelers says they haven't typically decided on a specific destination. Since many travelers still have an open mind about where they'll go and who they'll book with, these are prime opportunities for travel brands to make an impression.

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Exclusive and authentic tourism experiences are increasingly popular

There is a continuing movement in travel towards an experience economy. Travellers are increasingly searching for unique, exclusive experiences that create lasting memories. Part of this trend is an interest in authentic experiences in non-traditional destinations where travellers can interact with local people.

An increasingly popular expression of this trend is creative tourism. This allows travellers to actively participate in courses and learning experiences characteristic to the destination. Activities can range from traditional cooking to dance, handicraft or artwork. Originally, creative tourists were mainly people who practiced a creative activity at home and extended this to their holiday. Now, however, tourists of various backgrounds increasingly add creative aspects to their trips.

Peer-to-peer travel is expanding

Related to exclusive and authentic experiences, peer-to-peer travel continues to expand rapidly, both in numbers and in segments. Its exact impact on the traditional travel industry can be disputed, but collaboration may offer opportunities.

In peer-to-peer travel, consumers offer travel products to other consumers through online platforms. This allows inhabitants of tourist destinations to sell tourism products to travellers without involving professional tourism suppliers. It started out with overnight stays at people's homes, followed by dining experiences. For example, Airbnb now has more than 2.3 million listings.

Travellers increasingly want to book all aspects of their trip "on demand", where and when it suits them, including tours and activities. This is leading not only online travel companies such as TripAdvisor and Expedia to offer tours and activities, but also peer-to-peer platforms such as Airbnb with their 'experiences' offering.

Peer-to-peer platforms cleverly play into the continuing travel trend of authentic experiences. The tours and activities that they offer have a more local, experiential and unique feel than traditional guided tours. This offers opportunities for locals who can host their own tours and activities, but – as in the accommodation sector – the impact on traditional travel industry is unclear.

The Process

The "I want to get away" moment

Travelers use Destinations on Google to learn about different destinations, explore points of interest, and get a snapshot of what a week-long trip might cost. 54% of leisure travelers say that pictures of a destination are important when choosing where to go.

Most travelers venture to destinations they've never visited before: 53% of leisure travelers say they chose a travel destination because they want to visit new places. And only 18% of leisure travelers plan to revisit places they've been.



60%

of searches for destination information come from mobile devices.



3 in 5

travelers who watch online video use it to narrow down their brand, destination, or activity choices.

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The “time to plan it” moment

70% of travelers with smartphones have done travel research on their smartphone. Top things travelers look for in these particular micro-moments include prices, accommodation reviews/pictures/cost/availability, flight length, travel schedules, and activities in the destination.

Leisure travelers today are as likely to shop for flights on their smartphones as they are to shop for music. More than one in three travelers with smartphones agree that when researching on their smartphones, they've discovered a new travel company. And that's even higher for millennial travelers; 50% discovered a new travel company while researching on mobile.

The “lets book it” moment

As much as mobile research and bookings have grown, the majority of travelers, especially those taking personal trips, still book on a desktop or laptop. 94% percent of leisure travelers switch between devices as they plan or book a trip and 46% of travelers with smartphones say they make their decision on mobile, but then book on another device.

This is in part due to the anxiety factor when it comes to booking travel on mobile. 69% percent of leisure travelers worry that they're not finding the best price or making the best decision and only 23% of leisure travelers are confident they can find all of the same hotel and flight information on their smartphone that they can on their desktop.



52%

of travelers with smartphones said they'd switch sites or apps because it takes too long to load.



45%

would switch if it takes too many steps to book or get desired information.

The “time to explore” moment

85% of leisure travelers decide on activities only after having arrived at the destination. Nearly nine out of 10 travelers expect their travel provider to share relevant information while they are on their trip.

Travelers increasingly rely on mobile to get their bearings when they arrive in a new destination. Smartphone searches at hotels increased about 30% in the last year. Since smartphones are location-aware, we often see people (including travelers) search for "things to do near me."

Sources

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