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**Public attitudes to the
UK staycation market**

2022

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NATURE'S ADVENTURE

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1. Introduction

The Great British holiday was long seen as a status symbol. The further you went and the more exotic the places you visited, the more impressed your friends and relatives would be.

The world has changed. Today, people want experiences. Whether 1,000 miles away or 100, it's about the memories, not the miles.

Then the COVID-19 pandemic hit. It impacted every element of how people live, work, and play.

It also had a profound effect on how people holiday; the UK staycation market experienced a huge rise in numbers. Add to that the current cost of living crisis and it's clear to see why people choose to holiday at home.

Has that trend continued and what experiences do people look for to keep them - and their children - entertained?

Wildfox Resorts seeks to answer those questions. Wildfox is determined to change the game of UK holidays and offer consumers a new, dynamic and innovative approach to staycations.

Wildfox Resorts is on a mission to create lifestyle resorts that build memorable experiences. It will deliver a resort that values people, the planet and pleasure. How? By building a community, within a community. Living for the moment, whilst planning for the future. And, offering an experience that looks, tastes and feels like quality.

This is the driving force behind our research. We explored the UK staycation market to uncover how people of all ages holiday in the UK. We sampled 1,300 General Consumers in the UK aged 18 plus (national representative sample) with a boosted sample of 506 in Wales, totalling 1,806 respondents overall.

From planning the perfect escape to enjoying the perfect drink, we dive into the details to uncover what makes the UK staycation such a buoyant and evolving market - with plenty more opportunity on the horizon.



2. Demand for staycations in the UK

There is extensive data to suggest that the UK domestic holiday market has grown considerably, which was exacerbated by the COVID-19 pandemic in which we all had to look closer to home for that sense of escape.

Our research maintains this narrative, with the majority of respondents anticipating taking a day trip and a domestic UK holiday within the next 12 months. Interest for this type of holiday remains consistent across all demographics, from 18-55 years old, with a peak of interest amongst 25-34-year-olds.

However, despite growing demand, the level of spend remains the same with no clear preference to spend more or less on holidays within the next 12 months. When taking a regional perspective, respondents from Wales showed the highest willingness to spend more on domestic holidays at **35%**.

When considering what holidays respondents were likely to plan in the future, escapes to nature (63%), all-inclusive stays (**44%**), and spa holidays (34%) were the most popular. This highlights the desire for people to get away and relax, to have less to worry about, and to enjoy the escape.

3. When planning a holiday in the UK

The first part of any holiday experience is the planning. Choosing where to go can be a stressful time in itself as families must balance conflicting demands and increasingly high expectations.

We explored the topic of planning by asking respondents to rank what they considered the most important elements of their holiday at this early stage. The three most popular were:

Relaxation and Wellbeing:

74% of respondents ranked relaxation and wellbeing as an important experience, with high preference across both males and females. The most responsive age demographic was found within 55 years plus, with nearly 500 unique responses.

Exploring somewhere new:

68% of respondents identified exploring somewhere new as a key priority when thinking about planning a holiday. A willingness to explore grew in popularity through 18 to 44 year-olds, and then diminished from 45 to over 55 year-olds. Regionality showed that Welsh respondents were the most eager to explore, in comparison to other UK regions, with respondents in the city of Cardiff showing the strongest preference at **79%**.

Seeing iconic landmarks (historic, natural, etc.)

64% of respondents claim that seeing iconic landmarks, including local history and natural landscapes, are important factors when planning a holiday. Females showed a higher preference for this element of a holiday. Respondents in regions including Greater London, the South East, and Wales had the highest percentage.

4. Relaxation and wellbeing

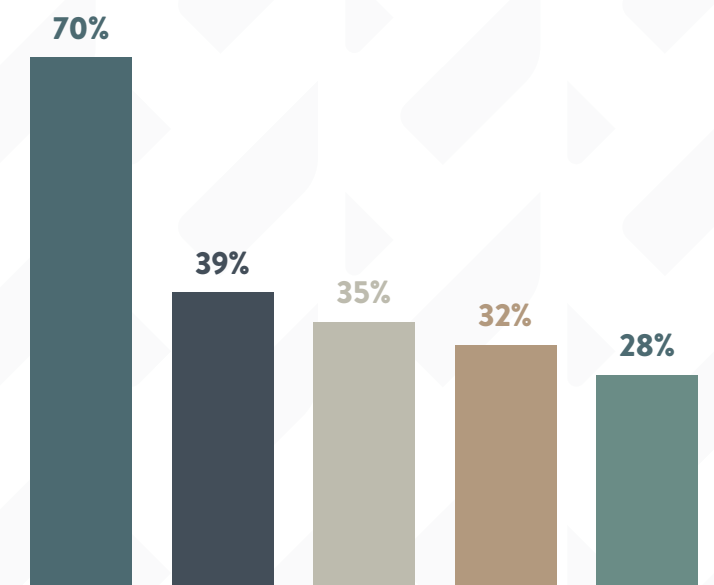
With relaxation and wellbeing high on peoples' agendas when planning a holiday, we explored the topic further. We sought to understand what is key to the relaxation and wellbeing of respondents when holidaying. The results show that:

- **65%** of respondents see spending time with family, friends or a partner as important
- **51%** of respondents see spending time in nature as important
- **50%** of respondents said that reading or listening to music was important, as well as spending time alone
- **32%** of respondents believe that switching off electronic devices is important

In addition to the above, booking spa facilities was a popular way of accessing relaxation and wellbeing experiences amongst female respondents.

5. Food and beverage

A fundamental part of any holiday for holidaymakers is dining and drinking. **63%** of respondents highlighted trying local food and drink specialties as an important holiday experience. For those that said this was very important or somewhat important, respondents access this experience by:



- Trying local cuisines and dishes
- Experiencing local nightlife
- Visiting farmers markets
- Buying and cooking local produce
- Eating local organic produce

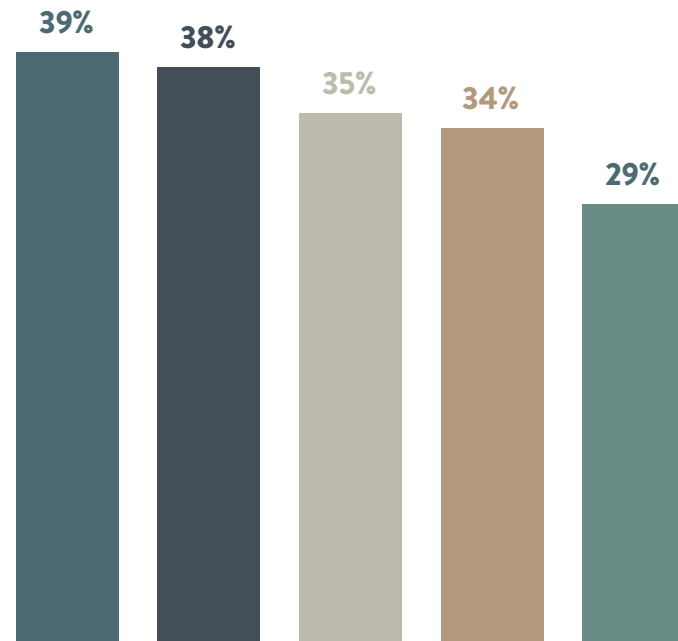
Food and beverage was a higher priority for those 45 years old and above.

6. Accommodation

The rise in people seeking out experiential holidays has seen a huge increase in the type of accommodation available to holidaymakers, with unique offerings charged at a premium.

Our research found that a quarter of respondents (**25%**) agreed that unusual accommodation was an important criterion when planning a holiday.

When asked what type of accommodation this would look like, respondents highlighted the following:



- Unique homes to rent (castles, cottages, treehouses, lighthouses etc)
- Lodges and barns
- Huts & Cabins
- Luxury Hotels
- Camping

Across all demographics, there was a preference for self-contained accommodation; specifically homes to rent, lodges and barns, and huts and cabins.

7. Peoples' priorities

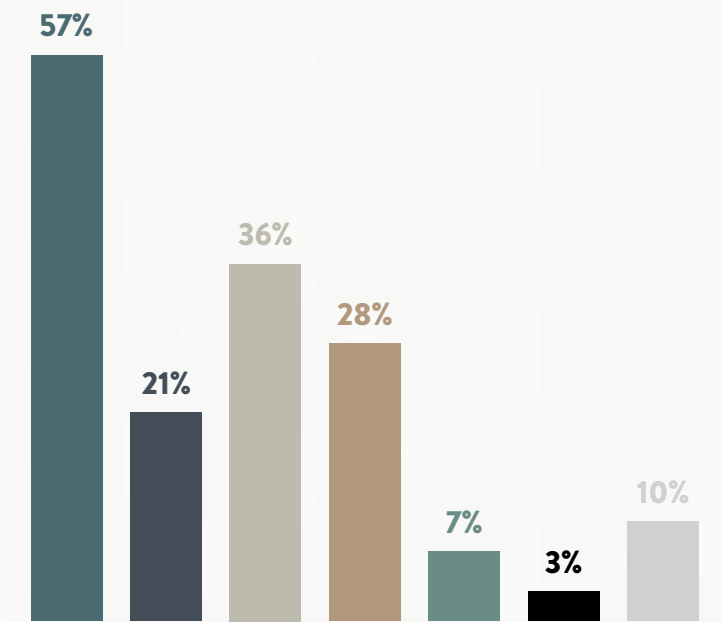
When it comes to planning, people have a wide range of priorities that govern how they research, consider, and decide on their holiday experience. To explore this topic in detail, respondents were presented with a series of statements.

- Agree (Net)
- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Disagree (Net)

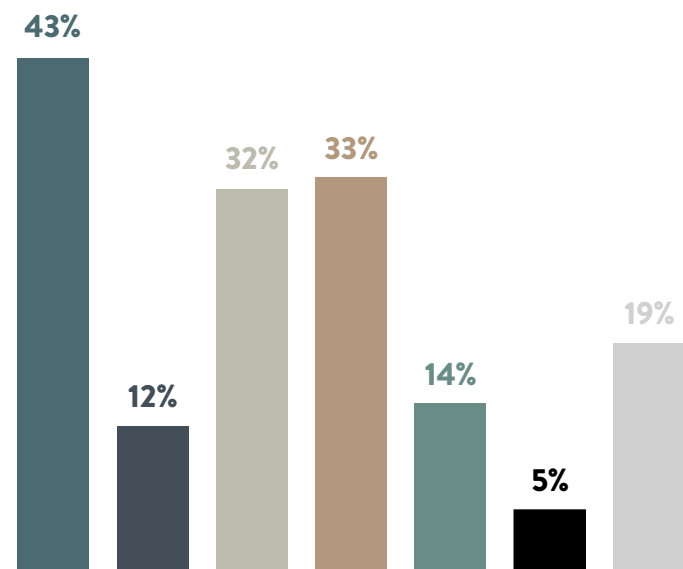
7.1 Maximising experiences over financial cost

57% of respondents agreed that experiencing as much as possible, in the time available, was the most important priority when on holiday in the UK. This was further supported by **43%** of respondents who agreed that experiences on holiday are more important than the financial expense.

When I go on holiday I want to experience as much as possible in the time I have available



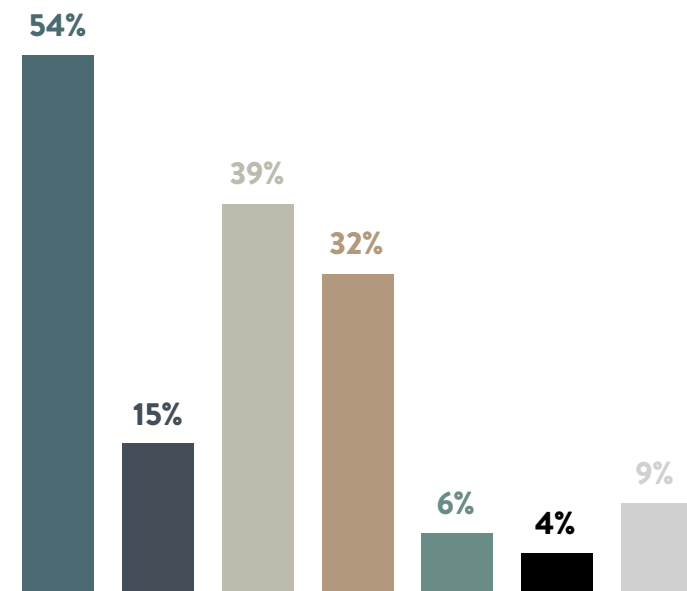
When I go on holiday, the things I experience are more important than the financial expense



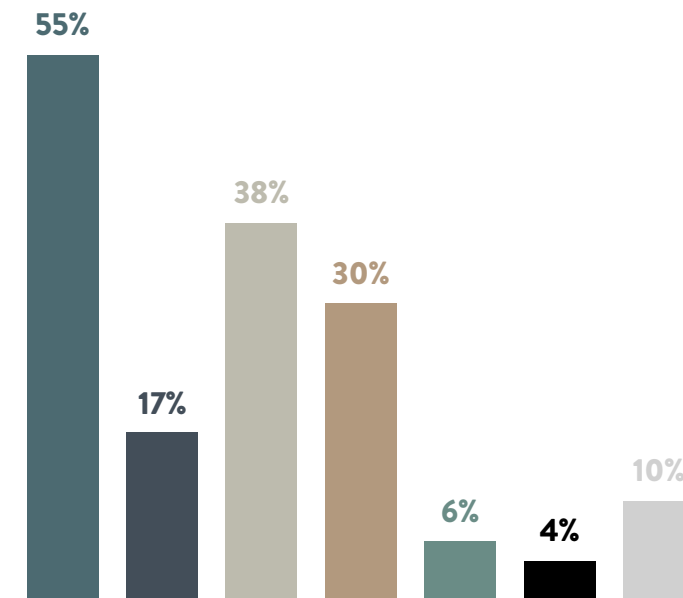
7.2 Supporting local people and businesses

Respondents showed a fondness for supporting local businesses and people whilst on holiday in the UK. Over half of the sample said they care about supporting local people and businesses and the customer experience received, specifically meeting and being welcomed by, friendly local people (54%). These were all considered important factors in creating a memorable holiday experience.

I care about supporting local people and businesses when on holiday



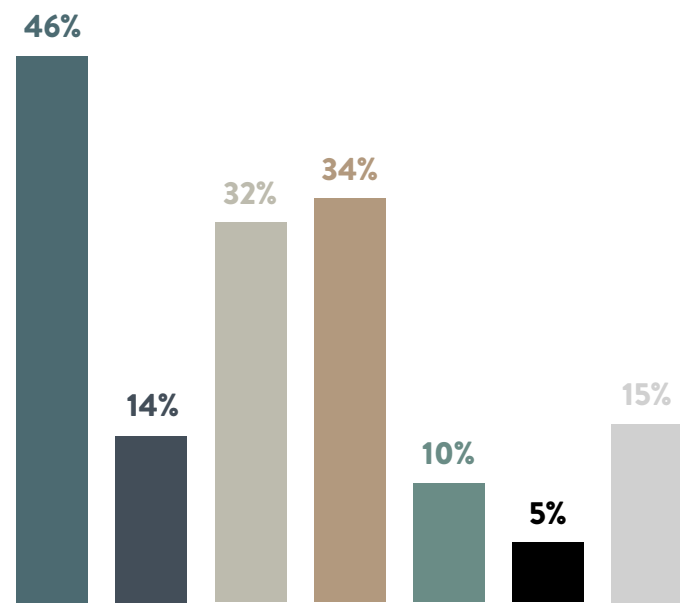
Meeting friendly and welcoming local people makes my trip memorable/is important to me



7.3 Quality accommodation

Staying in quality accommodation was also marked as an important criterion when on holiday. Almost half of the respondents (**46%**), said they would not compromise on the quality of accommodation when holidaying in the UK.

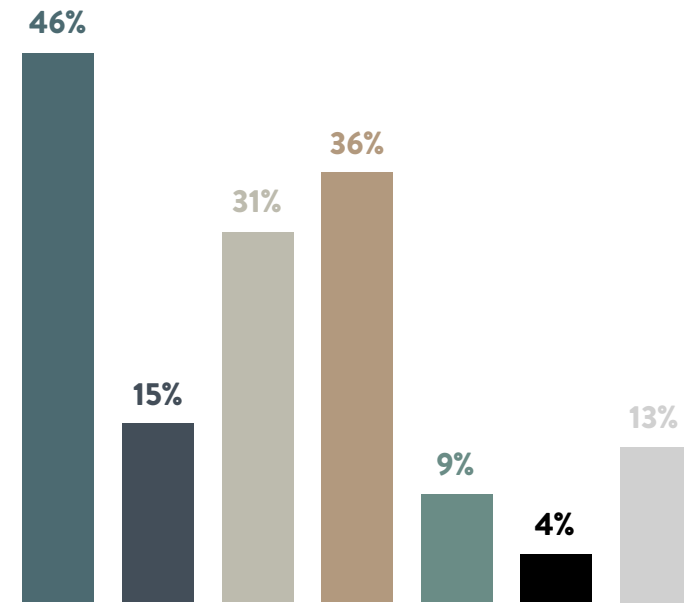
Quality accommodation is something that I won't compromise on



7.4 Visiting new places and discovering new things

Holiday consumers in the UK were in agreement (**46%**) that visiting new places and discovering new things such as sports activities, natural and historic landmarks, and people, was an important factor when on holiday.

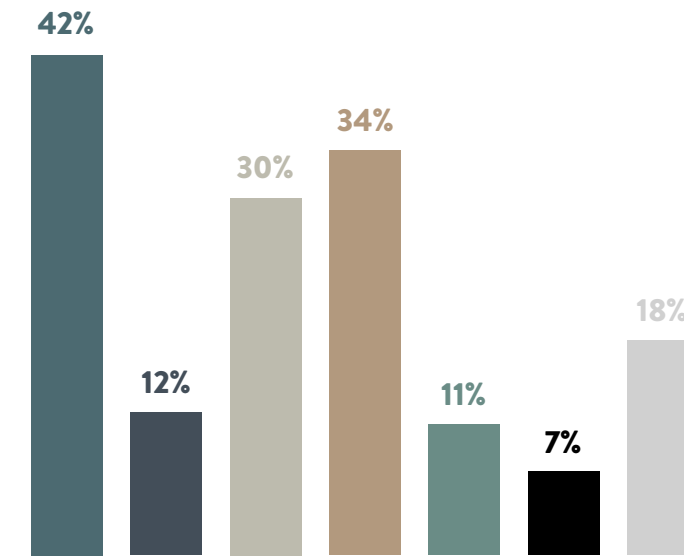
I prefer to visit new places and discover new things



7.5 All-year-round holiday location

There was support for an all-year round holiday destination in the UK, with this hospitality offering appealing to **42%** of respondents - suggesting that the Great British public may be more willing to embrace the rain.

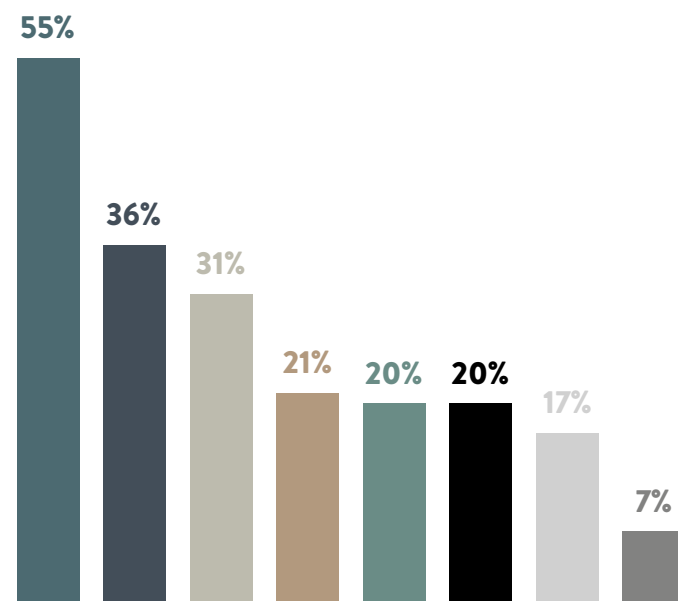
An all-year-round holiday location in the UK appeals to me



8. Adventure holidays

A holiday can be a time to relax, or it can be a time to try something new. The rise of adventure holidays has brought about a new sense of achievement that often sees people want to return for more. Considering outdoor activities and sports as an important holiday experience, we asked respondents how they would ideally access such experiences. Results found:

There was a clear split between sexes, with the data showing that females are much more likely to access outdoor activities and sports through self-determined choices, such as going on a walk, run, cycle or swim, pre-organised activities or activities offered within the accommodation site. Males showed a preference for outdoor activities and sports offerings that required renting or hiring equipment, or attending a sports event.

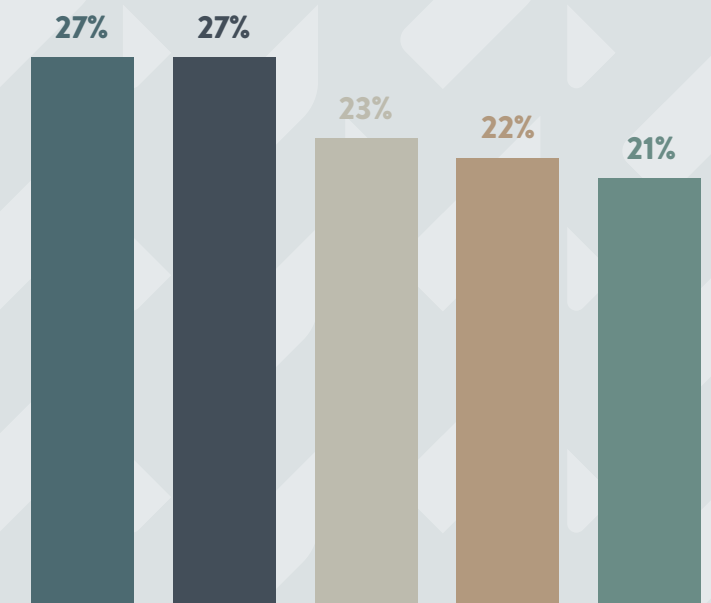


- Going for a walk, run, cycle, or swim
- Taking part in outdoor sports or activities
- Utilising sports facilities within your accommodation
- Taking part in organised sports / outdoor activities
- Renting or hiring sports equipment
- Attending a sporting event
- Bringing your own sports equipment
- I don't access them in any particular way

There was also a split in preferences by age demographic:

- Going for a walk, run, cycle or swim, taking part in outdoor sports or activities, and renting or hiring sports equipment or equally, bringing your own sports equipment was most popular amongst **45-54-year-olds**.
- Utilising sports facilities within your accommodation and taking part in organised sports / outdoor activities was most popular amongst **18-24-year-olds**.
- Attending a sports event was most popular amongst **25-34-year-olds**.
- Respondents that don't access outdoor activities and sports in a particular way were **over 55 year olds**.

In addition to outdoor activities, respondents were also asked to consider adrenaline and adventure sports. Within the sample group that said adrenaline sports/adventure sports are 'very important' or 'somewhat important' to them when thinking about planning a holiday, the top five preferred activities were:



- Hill or mountain walking
- Water sports
- Rock Climbing
- Diving
- Mountain biking

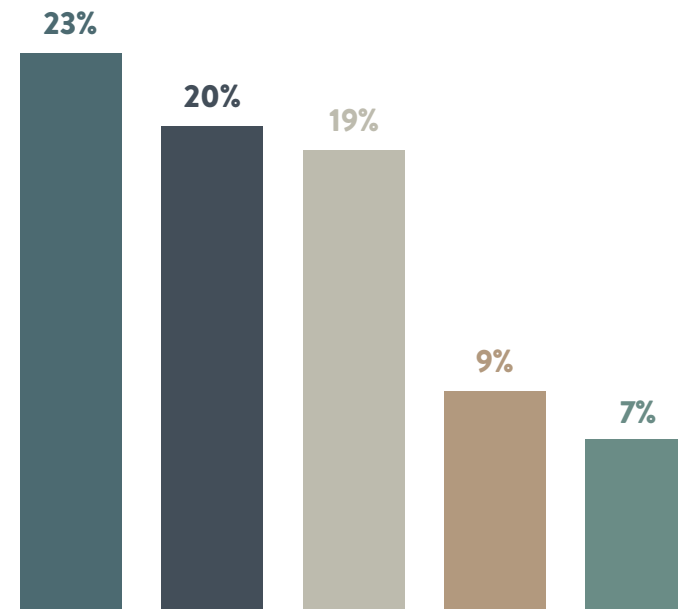
Age demographics also showed a preference for different adrenaline and adventure sports.

Data found that:

- Age **18-24** year olds showed equal interest in mountain biking and ziplining
- Age **25-34** year olds showed the highest interest in water sports
- Age **35-44** year olds showed the highest interest in hill or mountain walking
- Age **45-54** year olds showed the highest interest in off-road driving
- Age **55** years and older showed the highest interest in skiing

In comparison, there were a number of respondents who felt barriers to participating in an adventure based holiday. Of those that felt this is something they might enjoy, the most common barriers to participation were:

- I have no experience of what an adventure holiday would be like
- I would not feel safe taking part in adventure activities
- Too expensive
- I wouldn't know where or how to book an adventure holiday in the UK
- Not suitable for children



9. When on an adventure holidays

When experiencing an adventure holiday, respondents said they were most likely to go with:



A partner or spouse 47%



Immediate family (children above 5 years old) 29%



Group of friends (no children) 23%

With a varied picture of what an adventure holiday would look like to some - from high octane sports, to confidence building or, just simply getting out in nature, the ideal holiday duration was mixed. Most popular responses included a long weekend (2-3 nights), and up to a week (6-7 nights).

We asked respondents, when on an adventure holiday, what activities would you most likely want to participate in. Results found that respondents were most likely to want to engage in:



Indoor swimming (51%) and Indoor water park (45.95%)



Zip coaster 30%



High ropes 29%



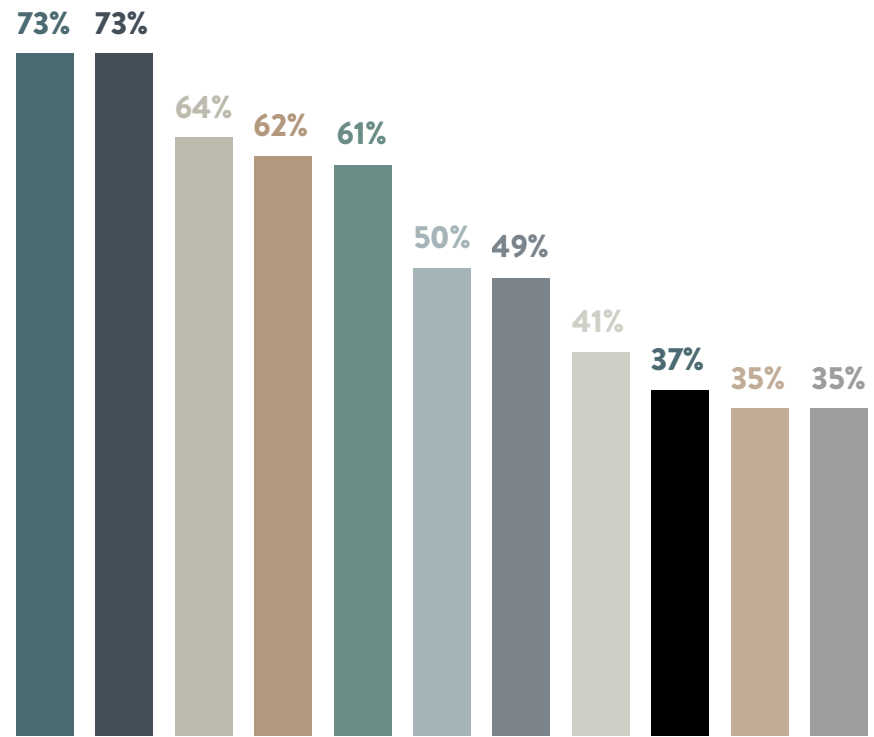
Climbing and Abseiling 27%



Canyoning (22%) and Coasteering (17%)

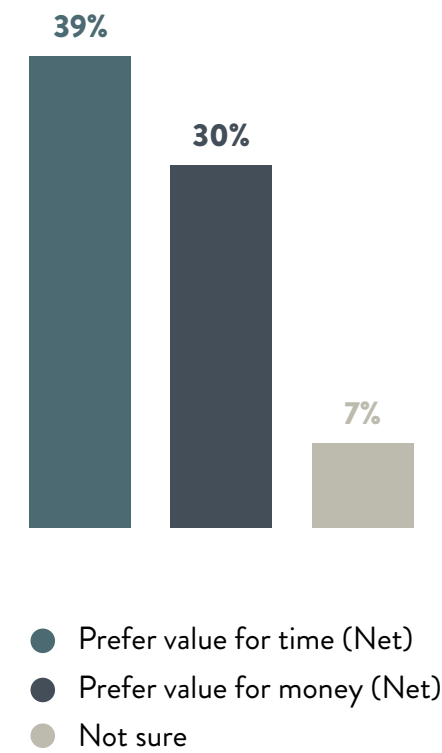
To build a better picture of this tourism market and to understand what would be included in consumers' adventure holiday criteria, we asked respondents to prioritise a set of requirements.

The data showed the order of importance:

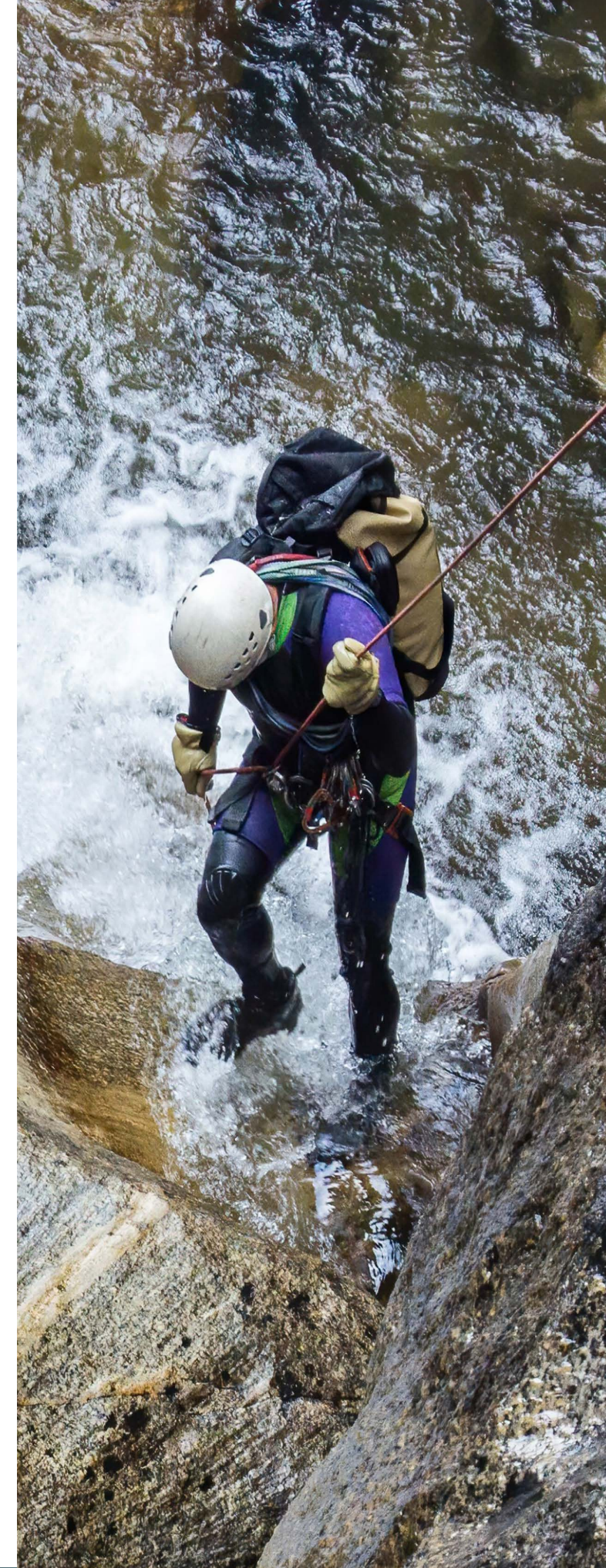


- Safety of location - Important (Net)
- Rest and relaxation - Important (Net)
- High-quality food - Important (Net)
- High-quality accommodation - Important (Net)
- Booking flexibility - Important (Net)
- Cultural experiences - Important (Net)
- Minimal amount of time spent travelling to reach the destination - Important (Net)
- The destination is easily reachable by public transport - Important (Net)
- The location has access to a range of outdoor activities - Important (Net)
- Opportunities to meet new people - Important (Net)
- Options to access activities to keep children entertained/active - Important (Net)

Overall, when asked whether consumers would prefer that their trip gave them value for time or value for money, results showed a net preference for value for time. Most prominently within younger age demographics between 18 and 34 year olds, peaking at almost half of all respondents preferring value for time (48%).



- Prefer value for time (Net)
- Prefer value for money (Net)
- Not sure



10. Conclusion

This research supports emerging trends within the hospitality market in the UK as a whole. Several key themes have emerged:

Escapes to nature are booming

The COVID-19 pandemic shone a light on the accessibility of green spaces and how intrinsically linked it is to consumers' mental and physical wellbeing. This increase in interest has trickled into a trend within the domestic tourism market. We found the most prominent support for holidays was for those that were nature-based over anything else.

When considering important factors when planning a holiday, nature was also a common denominator. Respondents' top three priorities were relaxation and wellbeing, exploring somewhere new, and seeing iconic landmarks, including landscapes. And when specifically asked how respondents accessed relaxation and wellbeing on holiday, over half of the sample identified this being achieved by spending time in nature.

Evidence of the value-for-time concept

Experience-led holiday destinations, although popular, have been little tested. Our research found support for the value-for-time concept.

When presented with a series of statements regarding the hospitality experience within the UK, over half of respondents highlighted that the most important element of a domestic holiday was experiencing as much as possible in the time available. Almost half of the respondents agreed that these experiences were more important than the financial expense.

A desire for quality

The concept of a quality experience was also embodied through the wider hospitality offering. Respondents identified the importance of providing quality food and beverage options. In addition, there was a general consensus that they would not compromise on quality accommodation.

Value-add was identified through secondary benefits of a domestic holiday, with respondents highlighting that supporting local businesses and connecting with local and friendly people were also key components to a positive holiday experience.

Untapped demand and services for adventure retreats In the UK

There is a positive trend in both respondents' interest and engagement with not only outdoor activities, but adrenaline-fuelled adventure activities; irrespective of age and sex.

However, the current market offering has barriers to entry from consumers. Respondents highlighted that a lack of experience in this holiday market, concerns over safety, and financial expense prevents them from engaging with this type of holiday offer. Having addressed these barriers, respondents found that adventure holidays are an attractive destination for romantic partners, families, and friends. Standout adventure activities included zip coaster, high ropes, coasteering, canyoning, and climbing.

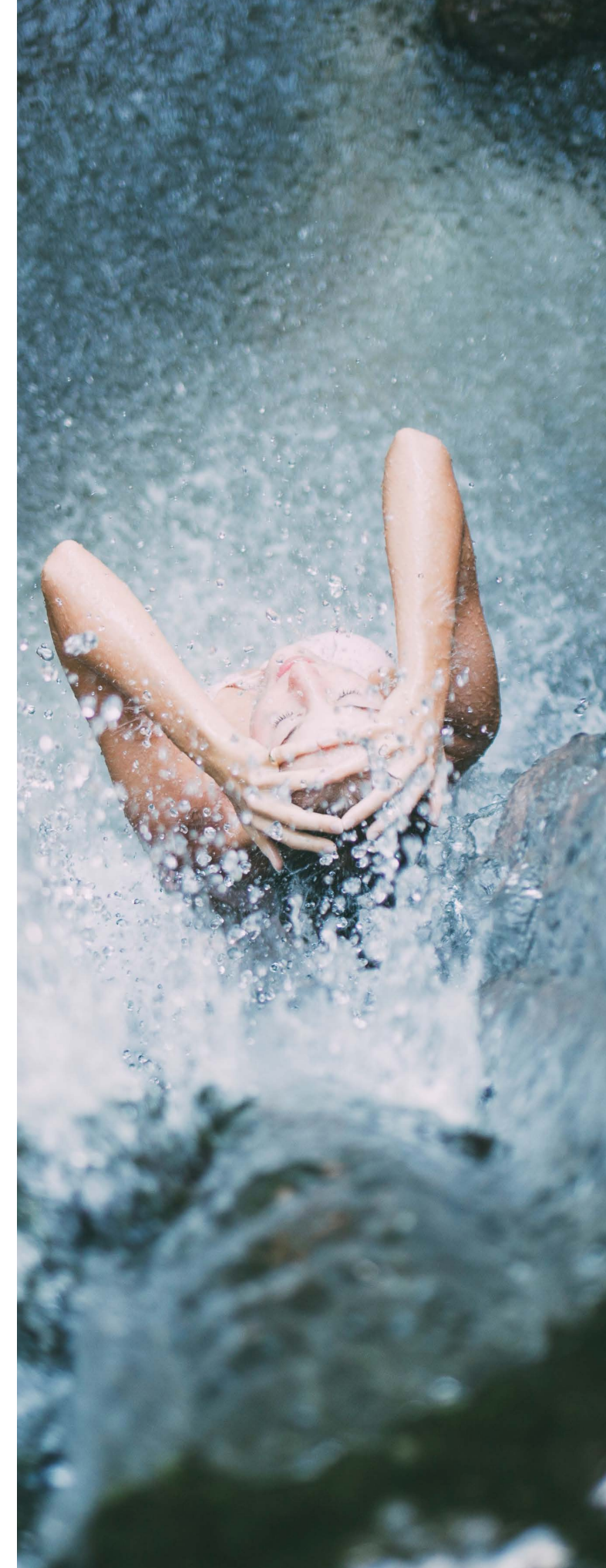
Collaborative delivery

To attract consumers to book an adventure holiday, key priorities to promote included the safety of the location, opportunity for rest and relaxation, high-quality food and accommodation, and booking flexibility - all year round - whatever the weather.

Considered together, our research points to a growing demand for UK staycations that offer unique and memorable experiences, built around escape, relaxation, and adventure.

Working together to capitalise on these opportunities - and deliver a high-quality service that is true to the local region - is at the heart of Wildfox Resorts.

To find out more, please visit www.wildfoxresorts.com.





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