THE GREAT ESCAPE:
Rethinking Travel’s Path to Purchase.

In partnership with

FOOD & DRINK

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INTRODUCTION

It’s hard to think of a time when holidaying was as easy as choosing a destination, packing a bag, and hitting the road. An annual necessity for most, travel is our tonic to monotony. It is daily life done better, our best selves, better—the world as we know it but with a big juicy cherry on top.

Unfortunately, when a global pandemic like COVID-19 strikes, governed heavily by tough restrictions, lockdowns and quarantines, our dreams have felt more fantasy than reality.

The road to recovery for the travel industry has had so many twists and turns that we can’t decide if we are more lost now than we were 18 months ago. With several hurdles, from red lists to cancellations to refund policies, it’s hard to envisage whether things will ever really go back to how they were. This being said, with the world becoming a more vaccinated place, pent-up demand has never felt so surface level and ready to burst. Because, if anything, a worldwide lockdown only makes us want to escape more, right?

Essentially, the real clarity going forward is not going to come from us, the marketers, or the brands, but the consumers themselves. The dreamers, the planners, the buyers, and the holiday-lovers. And not just where they’re clicking or what keywords they’re searching, but how they’re feeling. If 2022 is the big travel come-back, what is it going to look like? Having been out of practice for so long, what are consumers valuing the most for when they return and how have these values been affected by the pandemic?

To find these answers, we’ve asked them ourselves. Together with Travelzoo, Accord Marketing have surveyed holidaymakers to find out what the past 18 months have done to their perception of the travel industry and how they’re navigating their way through the new (or perhaps same-old) consumer journey.
METHODOLOGY

Accord Marketing partnered with Travelzoo to research the travel path to purchase in the United Kingdom.

Custom survey qualifications

■ Age 18+
■ Live in the UK
■ In the path to purchase for a holiday abroad this year or next

Method

■ 10-minute online survey
■ Fieldwork conducted in August 2021

Data sources

<table>
<thead>
<tr>
<th>Travelzoo members</th>
<th>OnePoll survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,568 respondents</td>
<td>600 respondents</td>
</tr>
<tr>
<td>Aged 18+</td>
<td>Aged 18-50</td>
</tr>
</tbody>
</table>

Showcasing the opinion of a primed travel audience, complemented with external research to ensure suitable age representation.

Survey statistical reliability

■ A sample of 2,168 is reliable within ±2.1% points at a 95% confidence level
■ Confidence interval for:
  ● <35 = 5.6% points
  ● 35-54 = 4.1% points
  ● 55-74 = 2.9% points

Statistical significance testing used to draw audience profiles.
Obviously, confidence plays an incremental part in each of these stages - something that has been incredibly affected by the recent global pandemic.

From new health and safety factors at the planning stage to fit-to-fly test add-ons during booking, travel requires so much more consideration, time, and risk awareness from consumers than it ever once did. We’re here to work out what these changes have done to people’s perception and expectation of both the experience itself and the role of travel professionals.

As industry experts ourselves, we’ve watched the path to purchase shift and adapt to fit a digital-first landscape over the past few years. What was once a very linear journey is now not so much, due to media channels evolving to fit multiple stages and a generally faster-paced, more instantaneous consumer lifestyle.

So, with the pandemic accelerating people’s digital maturity even faster (and across all age groups), we were interested to see whether consumers want to hold onto that digital control, stay affiliated with these channels or rely on brands to take back the power and take greater care of the process.

That’s enough from us for now. Let’s hear from the people remapping the journey themselves and work out what all this means for marketers further down the road.

**Experience**

The part the consumer has been waiting for, where the dreaming stage finally becomes a reality, and the physical journey begins. Of course, external factors like delays, poor customer service, boredom or disinterest can take place during this period. Hence, it’s an opportunity for brands to still show that they are there for the consumer, even after a transaction has taken place.

**Advocacy**

And finally, the end of the journey, where consumers show off their experience to others. Whether that be through reviews, social media highlights or just a chat in the office, this sort of word of mouth advertising is an opportunity for current consumers to inspire and ignite the dreaming stage in potential new ones. And so, the journey begins again.
Generally, under 35s are less likely to be nervous or anxious and the 55-74-year-olds are more likely to cite caution. The 35–54-year-olds are slightly contradictory in their responses - as the age group more likely to be concerned with disruption, but also more likely to be “excited” and “ready to go”. This idea of being cautious but optimistic, concerned but excited, is a frame of mind that brands need to relate to - people can feel both at the same time in these unique circumstances and change their mind quickly too.

Grouping these responses together, we can see the greatest concerns are down to government protocol, which are also linked to cost. Closely followed are fears of holiday disruption due to changing traffic light systems. According to the PA News Agency, England's international travel rules have been changed 50 times since the start of the pandemic1 - that's an awful lot of Googling.

After disruption, safety is the next concern, which we found is more linked to feelings of anxiousness and nervousness, while protocol concerns are more likely to present a barrier mindset for some consumers. These people are waiting for certain protocols to come down before they will go, they “aren’t ready to go just yet”. The changes in protocol are more likely to boost travel, but messaging needs to provide reassurance around safety fears and ideally, once protocols change, they remain in place.

Clearly travel is not the same. Objectively, the extra costs and inconveniences have made people question the worth of the experience as people’s perceived value for money is put to the test. Holidays, with all these changes, must be worth the hassle.

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Travel intent

Before we kick things off with the dreaming stage, we were keen to gauge people’s general attitudes towards travel. With so much talk of pent-up demand, we need to understand people’s realistic intentions for 2022, including where travel professionals fit into people’s plans and how far ahead people start to organise their next big break.

Our research implies there’s still a wide element of uncertainty for holiday plans for next year, with nearly a fifth responding “don’t know” when asked how many holidays they intend to take. However, it’s important to note that this is not to say they don’t want to go, as zero was an option too. Of those able to indicate their intentions, only 4% are planning to not holiday abroad next year, compared to the 14% who didn’t holiday at all in 2019.

Furthermore, we are not seeing the number of holidays rise significantly in 2022. Around two-thirds of respondents are planning to take one or two holidays next year, much like in 2019, as opposed to wanting to take more to make up for lost time. This may be down to cautiousness, or perhaps people are more in the mindset to hold out for the “big one” (or two) next year - favouring quality over quantity.

If we break these results down by age, we can see that those aged under 55 are more likely than average to have taken just one holiday in 2019 and be planning the same in 2022. Those aged 55-74 are more likely to have taken three or more pre-pandemic but are cautious, just like all age groups regarding the number of holidays in 2022. With research by Silver Travel Advisor2 from August 2021 telling us that mature travellers are likely to want to spend the same or more on holidays in the next 12 months, but on the same number or fewer trips, we might assume that older travellers are in favour of quality over their usual quantity.

Regarding where respondents are sitting in their purchase journey for next year,

- **Travel intent**
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Regarding where respondents are sitting in their purchase journey for next year,

- **Start to think about when to go**
- **Start to think about where to go**
- **Decide which travel company to book with**
- **Actually book your holiday**

![Number of holidays abroad](image)

When does dreaming, planning, and booking take place?

<table>
<thead>
<tr>
<th>When does dreaming, planning, and booking take place?</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 6 months before</td>
</tr>
<tr>
<td>Start to think about when to go</td>
</tr>
<tr>
<td>Start to think about where to go</td>
</tr>
<tr>
<td>Decide which travel company to book with</td>
</tr>
<tr>
<td>Actually book your holiday</td>
</tr>
</tbody>
</table>
If we compare 2019 with 2022, fewer people are thinking about booking more than six months in advance, with more people on the two-month mark. This implies that seasonality might not be what is used to be, i.e. peak seasons happening at the start of the year, ready for summer six to eight months down the line.

### Table: Timeframe Source More Than 6 Months 4-6 Months 2-3 Months Up to 1 Month

<table>
<thead>
<tr>
<th>TIMEFRAME</th>
<th>SOURCE</th>
<th>MORE THAN 6 MONTHS</th>
<th>4-6 MONTHS</th>
<th>2-3 MONTHS</th>
<th>UP TO 1 MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-pandemic (October 2019)</td>
<td>Statista</td>
<td>38%</td>
<td>25%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>August 2021</td>
<td>Accord/Travelzoo</td>
<td>31%</td>
<td>29%</td>
<td>27%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Generally, it is the younger audience (those under 35) and males who are more likely than average to book last-minute (one to two weeks in advance). Older age groups, particularly the 65-74 bracket, are more likely to book four to six months ahead. Regarding where people are within their purchase journey, those who sit within that early dreaming stage are looking to book at least two months in advance once they’re ready to commit.

#### The travel professional

Our desire to speak to travel experts increases during the path to purchase, with 46% wishing to at the turning point of booking. However once booked, the ball is in the holidaymaker’s court and their likelihood to reach out to a professional dips.

Amidst ever-fluctuating travel restrictions, parting with our money to book a holiday has become a weightier task that requires more caution than it ever once did. Travel professionals now represent a newly appreciated sense of expertise and security and should lead with these messages. ABTA’s research shows that holidaymakers are 25% more likely to book a holiday with a travel professional now than before the pandemic.

Our analysis reveals that those more likely to reach out to an expert are under the age of 35 and those who have already booked their holidays.

It poses the question: Have those who are yet to commit, sitting in the cautious dreaming stage, underestimated the support a travel professional can provide?
What is the path to purchase?

With a score of 1 representing the first/top decision, we can see that deciding a destination is the general priority for people. Of course, this is something that has been heavily affected by the pandemic, with colour coded traffic light systems and conflicting entry requirements making destinations fit or unfit to travel to – a system that is under constant review. It's a time where people have only been able to travel to where they can, not necessarily to where they want.

Breaking down these results by age, we can see that those over 35 are most likely to rate destination as the top decision. Those under 35 are more likely to rate date of the holiday as the first decision – potentially due to busy life schedules or work commitments.

Interestingly, though choice of company was the most common last decision overall, 12% still rated this as number 1 or 2. Those who gave company loyalty priority were more likely to be under 35 and those who had already booked a holiday for 2022 – implying that brand value holds higher significance for people travelling through and beyond the pandemic.

A third of respondents said they “never” speak to a professional during the holiday process. These respondents are more likely than average to be in the 45-54 age bracket.

When we asked why, it appears that some people genuinely enjoy the responsibility and independence of doing their own research, or feel comfortable enough organising their holiday themselves, meaning there’s no perceived need to introduce a third party. When holiday planning becomes a little more complex, for either far-flung travels or multi-stop destinations, that’s when travel professionals are perceived to be at their most valuable. Those who had not had a good experience with travel professionals and therefore do not wish to use them cited it was because they were biased, unhelpful and pushy.

Order of travel decisions

1 DESTINATION (1.67)
2 DATE OF HOLIDAY (1.98)
3 ACCOMMODATION (3.53)
4 FLIGHTS (3.71)
5 WHICH TRAVEL COMPANY USE (4.10)

Mean scores – the lower the score, the earlier in the decision-making process.
Dreaming

I want to get away and I am looking for inspiration

Where it all begins – the moments that flick the switch in people’s minds to get away and start the journey. Unsurprisingly, having spent longer than usual in the dreaming stage, behavioural and wellbeing reasons are people’s main motivations to get away – something a national lockdown inevitably magnifies. Destination is a big influencer too.

<table>
<thead>
<tr>
<th>Holiday inspiration</th>
<th>Relevance rating on a 7-point scale. Ratings of 7, 6 = extremely/very relevant.</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are specific destinations that I want to visit</td>
<td>65%</td>
</tr>
<tr>
<td>Want to take a break/change from everyday life</td>
<td>64%</td>
</tr>
<tr>
<td>Need a holiday</td>
<td>60%</td>
</tr>
<tr>
<td>Have gone longer than normal without a holiday</td>
<td>59%</td>
</tr>
<tr>
<td>To spend quality time with the people I travel with</td>
<td>56%</td>
</tr>
<tr>
<td>To experience something new</td>
<td>53%</td>
</tr>
<tr>
<td>Had one or more holidays postponed/cancelled</td>
<td>41%</td>
</tr>
<tr>
<td>For the excitement/anticipation of planning travel</td>
<td>39%</td>
</tr>
<tr>
<td>Saw a special offer</td>
<td>39%</td>
</tr>
</tbody>
</table>

Of course, reasons for getting away are personal to each individual and will vary, purchase journey to purchase journey. Breaking this question down by age, we notice some interesting differences. Those aged 25-34 are more likely than others to say they want to holiday for the excitement, while 35-44-year-olds are more likely to say because they need to. The 45-54 group over-index on wanting to travel to spend quality time together (potentially due to teenage children getting older), with the 55-64 and 65+ groups wanting to get away for the destination itself, driving that 65% total. Overall, females are more likely to agree that excitement is a motivator, as is to experience something new.

People’s heightened desire to take a break and their ‘need’ to get away are emotive messages rather than functional. If a brand isn’t using emotion at the start of the journey, it’s missing an opportunity to stand out (early) in a competitive landscape.

But it’s not one-size-fits-all, with nuances between age groups displaying key differences. Younger consumers associate the experience with excitement while the core family audience sees holidays as fulfilling a ‘need’ to get away. Older consumers seek travel more as an opportunity to spend quality time with others.

Once the emotional need has been triggered, the destination then arrives as the first ‘big’ functional decision.
Planning
I am actively researching where, what and when

The planning process has been hard-hit in the past year with so many additional factors to consider during research e.g., vaccinations, testing, infection rates – not to mention a whole new dependence on cancellation policies. With so many extra processes to go through, brands must think logically and emotionally of how to simplify the process, without losing informative reassurance.

When it comes to planning a holiday destination, weather is key. However, a close second is low COVID levels – a new entry to the path to purchase. A destination with low COVID levels naturally becomes a more available and easier place to access, which may be creating a new emotional desire to visit – a desire that wasn’t necessarily there before the pandemic. So, is safety the draw? Or is it availability?

Choosing a destination

1. DESIRED WEATHER (3.40)
2. LOW COVID LEVELS (3.67)
3. SOMEWHERE NEW (3.97)
4. DEPARTURE AIRPORT (4.00)
5. LENGTH OF FLIGHT (4.52)
6. LESS POPULAR WITH TOURISTS (5.26)
7. SOMEWHERE I’M FAMILIAR WITH (5.43)
8. ARRIVAL AIRPORT (5.75)

Mean scores – the lower the score, the more important.

The process before booking has now changed.
Female, <35

It is more complicated now and more expensive because of tests and changing schedules.
Female, 35-54

Our research shows that those under the age of 35 are less concerned with virus levels. Younger respondents are more concerned with other practical reasons including length of flight, familiarity with destination and arrival airport. With busy schedules, an easy flight is a priority point for this demographic.

Weather becomes increasingly relevant to respondents as they get older. It is the most popular response from 55-74-year-olds, who are less likely to be concerned with familiarity and length of flight – implying older age groups may be
prepared to travel further afield to new destinations. The 65-64-year-olds are the most concerned age group regarding COVID levels.

Destination priorities also shift depending on where people are sitting in the purchase journey. We found that those who have already booked, or are researching, are most likely to say weather is the most important factor, while those in the dreaming stage said that COVID levels are a deal-breaking factor. It shows that low COVID levels (indicative of both increased safety and fewer restrictions in-destination) are vital in getting the dreamer to convert and those ready to book to book.

Once people know where they want to go, it’s unsurprising that finding suitable flight dates/times is the next priority. Cost is also a relevant factor, but we can’t assume this necessarily translates as a cheap price tag or special offer. With increased costs on testing and cancellations, perhaps cost is more linked to value, i.e., people want to be sure their experience is going to be worth their money and that something is in it for them.

Accommodation reviews are also important, reinforcing the significance of the advocacy stage in the purchase journey and the influential power of word of mouth advertising.

Being helpful is key here since planning is where needs become more functional.

Our research shows that this stage is now a considerably more long-winded process – it essentially has its own beginning, middle and end.

A fundamental change that we’ve seen arise at this stage is something we call ‘the big pause’. This is a period of hesitancy that sits just before booking, where people are on hold, waiting for their chosen destination to be easily accessible, or the process of getting there to be considerably simpler.

Generally, flight dates and times are most important to those aged 65 and over, as well as those actively researching holidays. Cost is more of a concern for those below 65, particularly 45-64-year-olds. People sitting in the early dreaming stage are also more concerned with cost as well as those ready to book, but not yet committing. Understanding the attitudes linked to the price of a holiday will help brands understand how to convert these groups to the next stage in their purchase journey.

“Glad to be able to travel again, however more considered in my thinking and planning than before. A degree of trepidation has crept into something I was fearless to do but it hasn’t restricted my want and need to travel again.”

Male, 35-54
The final incentive that gets people to cross the line comes down to whether people feel their purchase is good value for money and a worthwhile experience to invest in. We can, therefore, assume that 'total cost' in the previous question was closely linked to value, more so than a cheap price. Our research shows that special deals and a small price tag are less relevant to holidaymakers.

Value itself has taken on a new meaning against the COVID-19 landscape. The cost of a holiday needs to reflect the right price for the matched experience - as there are now possible additional costs at the transaction stage (cancellations, testing, insurance etc) and additional costs to the experience itself (curfews, mask-wearing, restricted access to amenities). If costs are potentially going up and holiday quality is going down, brands must ensure they convince people that their trip is worth the money, regardless of new protocols.

In this new era of travel, trust is very important. We see that those who have already booked rated trust as top for making their final decision, implying that brand affiliation is playing an ever-increasing role. For all other stages in the path to purchase, value for money was the top response.

Travel companies should, therefore, ensure that their offerings show value for money alongside brand trust as people get closer to the booking mark.

<table>
<thead>
<tr>
<th>Primary factors in the booking decision</th>
<th>Relevance rating on a 7-point scale. Ratings of 7, 6 = extremely/very relevant.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value for money</td>
<td>78%</td>
</tr>
<tr>
<td>I trust the company I am booking with</td>
<td>77%</td>
</tr>
<tr>
<td>Good ratings and reviews for the accommodation</td>
<td>77%</td>
</tr>
<tr>
<td>The information I need about my holiday is readily available</td>
<td>73%</td>
</tr>
<tr>
<td>Easy-to-use website/booking process</td>
<td>72%</td>
</tr>
<tr>
<td>Good ratings and reviews for the travel company</td>
<td>70%</td>
</tr>
<tr>
<td>Incentives, eg, £ off, % saving</td>
<td>50%</td>
</tr>
<tr>
<td>Price – a low-cost holiday</td>
<td>38%</td>
</tr>
</tbody>
</table>
Diving deeper into these answers, we find that younger audiences appear more receptive to advertising, with under 35s more likely to resonate with ‘brand messages that reflect my values’ and more likely to trust brands where they have seen ads that they like. Whereas older consumers, those aged 55–74, are less likely to list this answer, which we may take to mean that they don’t feel as though ads resonate with them, or necessarily even target them. Across the board, good customer service is key and for 65-74-year-olds, having used the brand many times before was a strong influencer — showing their dedication to brand loyalty.

Earlier, we discovered that those younger audiences who had already booked were more likely than average to prioritise choice of travel company as their first consideration when beginning their path to purchase. With this audience also more likely to agree that relevant brand messaging is a signifier of trust, it shows that perhaps in the absence of brand experience, relevant marketing and messaging may be a way to build a trustworthy relationship.
Consumer reassurance

As stated earlier, holidaymakers are 25% more likely to book a holiday with a travel professional now than pre-pandemic, predominantly due to the security of booking a package holiday. Our findings are consistent with this notion, with 75% of respondents rating ABTA/ATOL protection as most important for making them feel comfortable when booking a trip. Unsurprisingly, free cancellation is also key – a perk that has seen a lot of attention in recent months.

Fluctuating protocols due to COVID-19 has been one of the biggest changes to travel in 2021 which, as a result, presents a new level of apprehension within the purchase journey. This fearful stage sits between booking and experience, as there is a chance that somewhere within this period, a holiday will have to be cancelled. This, of course, takes a lot of the fun out of the booking stage, which once used to be laced with nothing but excitement. Now, people must grapple with the idea that their big plans might not go ahead, which places a new-found pressure and reliance on flexible cancellation policies.

Trust, we can see, is a big part of getting people over the line and clearly communicated terms and conditions can help build confidence, along with negating qualms of disruption.

Cancellation information should be shouted loud and clear from the planning stage, whilst people are searching for brands and their reputations. This includes making noise about refunds, though vouchers and credit notes are a stronger influencer of reassurance for those under 35, more than older generations.

Those who have booked a holiday

TUI is the most popular brand amongst those who have already booked a holiday, with company loyalty coming through as a strong reason why people have chosen specific companies. This answer also stresses the importance of brand trust – if people have used a company before and had a good experience, they are likely to have built a trustworthy relationship.

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Having the ABTA/ATOL seal of approval is particularly important to age groups over 45. We can see that 55–74-year-olds require the most reassurance and for those under the age of 45, free cancellation is their most popular response.

### Reasons for travel company choice

- Used company before: 12%
- Good deal, right price, value: 9%
- Reliable, trust, reputation: 7%
- Booked flights and accommodation separately: 6%
- Location, the destination I wanted: 4%
- Prior COVID cancellation: 4%
- Cancellation policy, refunds, COVID cover, flexible booking: 4%
- Good customer service: 4%

This highly competitive stage was once a race to the bottom for brands, much influenced by price. Whilst price will always be important, the pandemic has turned our perception of value for money on its head. There are now additional costs arriving from two directions – the transaction stage (testing, insurance, cancellations) and the experience itself (the impact of restrictions, curfews etc) – travel must be worth it.

The ever-changing protocols have created a new level of trepidation; a phase of concern that sits somewhere between booking and experience, as people worry that their big trip might be cancelled. Transparent policies need to be actively promoted, not just at the point of booking, but from the very start of the planning stage.
It's no surprise that when we finally get
the chance to venture away, we want
our home-away-from-home to be of a
high standard. It's likely that cleanliness
has always been an important factor,
but the pandemic has heightened our
appreciation of spotless accommodation.

Generally, people aren't as concerned
with having an action-packed time (an
attitude also shared in the planning
stage) with resort amenities and things to
do being less of a priority, but are more
focused on having a good, memorable
experience. It comes back to this idea
of good value, which doesn't necessarily
relate to an action-packed resort, but
more a money-can't-buy state-of-mind
that we haven't been able to access for
so, so long. It appears the draw really is to
just get away.

When on your holiday, how important is each of the following?

- Cleanliness of accommodation: 87%
- A positive and memorable experience: 84%
- The food: 73%
- Accommodation amenities: 64%
- Pool/beach: 56%
- Availability and quality of local customer service/information: 55%
- Resort amenities: 54%
- Ideas for things to do: 41%
- Resort guide: 38%

Importance rating on a 7-point scale. Ratings of 7, 6 = extremely/very important.

Traditionally, accommodation reviews
became relevant during the planning stage. However, state of accommodation
is now an increasingly important factor
to throughout the journey - to the point
of cleanliness being the most important
factor during the actual experience. It
shows that people rely on good reviews
to give them the confidence to prioritise
options and ultimately book. Concerns
over cleanliness and safety are highest
amongst those aged over 45. For those
below 45, a positive experience (good
value) is the most important factor.
Consumer information needs

Generally, COVID-19 information, such as a country’s vaccination requirements and documentation to enter, is the most important. This makes sense, since without it, travel to certain destinations is simply not possible. We might assume that people now hold less fear of the actual virus itself but, nevertheless, they want to be aware of the hoops they need to jump through to go on holiday – hoops that never existed until now.

Delving further into the data, we can see that 55-74-year-olds are more likely than average to feel that protocol information is essential; we deem these the information seekers. Holiday experience is also highly rated as essential i.e., the destination’s policy on masks, curfews etc. This is slightly more apparent for those under the age of 35.

Interestingly, if we look at where respondents sit on the purchase journey, we can see that dreamers are more inclined to say most options are essential, whereas those who are ready to book are less likely to feel most statements are essential.

The experience stage sees two sets of needs that should be met. It starts with providing suitable COVID-19 information to help people feel in control and comfortable, then, once on holiday, takes a shift to creating an enriching, memorable experience – often the one that caused the initial emotional trigger.

People don’t necessarily know how they want to spend their holidays, with things-to-do and amenities being low on people’s priority lists. This is supported by Google research that states 85% of travellers don’t decide what they’re going to do on holiday until they get there. Brands can be a part of helping people whilst they’re actually away, communicating ideas and recommendations should they need/want them.

To provide protocol information for the holiday experience, the diagram shows the following information:

- **COVID Protocol**
  - Destination country’s COVID-19 testing and vaccination requirements
  - List of documentation required (tests, forms, etc)
  - Home country’s testing requirements
  - FCO/foreign travel advice

- **COVID Protection**
  - Destination country’s COVID-19 policy on safety (masks, social distancing, curfews, etc)
  - Travel provider’s COVID-19 policy
  - Travel insurance advice

- **COVID Safety**
  - Virus status at destination
  - Accommodation’s hygiene and safety measures

- **Traditional Information**
  - The weather
  - The exchange rate

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I would need a really clear source of information about testing requirements, restrictions at the destination, and cancellation policies for the airline and hotel.

Female, <35
Younger generations (those under 45), regardless of whether they’ve had a positive or negative travel experience, are most likely to share on social. Those over the age of 45 seem to share their good times with family and friends. If the experience is negative, it is the over 55s who are most likely to feedback their negative experience direct to the holiday provider.

Advocacy

I’m going to share my experience with others

Once people return home, a positive experience is mostly likely to be shared with family and friends than online via social media or a review site. The challenge is getting people to spread the positive message wider, especially since there is such influential power in a good review. Fortunately, a negative message is more likely to be shared directly with the holiday provider; however, over a quarter of respondents are likely to share a negative experience on a review site.

Advocacy has never been so important. People are craving reassurance from those who have gone away that all is safe, and the risk is worth it. Whilst social media is the platform that many of us turn to for sharing holiday snaps and experiences, our research shows a slightly different order of preference. People prioritise telling friends and family first, then typically review sites and thirdly social platforms.

Further nuances show that building up presence in the right places for the right demographic (younger groups are more affiliated with social media, while older groups are more accustomed to review sites) is key to ensuring your brand is advocated in the best possible way.

48% of <35-year-olds are likely to share a positive holiday experience on social media, 32% a negative experience.

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What sources of information are used across the journey?

We wanted to gauge how people move through the various stages. So, using a list of primary sources (including paid media, travel companies, review sites), we asked respondents which ones they use, from initial inspiration through to final booking.

It transpires that people tend to use higher volumes of sources at the start of their journey, in the inspiration-seeking stage. But, as they progress, the number of sources decreases in parallel to people narrowing down their brand choice to a final decision at the ready to book stage.

Unsurprisingly, travel company websites are an important resource throughout the path to purchase – growing in relevance as people move from dreaming to booking. This source was most relevant for 55–74-year-olds. Typical media channels (TV, radio, online, news brands, social) play a greater role in the inspiration stage and generally are more likely to be embraced by younger age groups under the age of 45 – potentially as these channels appeal to them the most. Those under 35 specifically rely on social media for inspiration, more likely so than older generations.

When actively planning, travel websites, review websites and search engines are equally important, but for 45-54-year-olds review websites are a strong source for the inspiration stage, stressing the importance and encouragement of good advocacy for this age group.

Interestingly, those who had already booked a holiday within the next year are more likely to say that they engage with media at each stage of the user journey. It implies and begs the question that trusted media channels are key to encouraging people to cross the line and secure a booking.

When it comes to the number of sources, people tend to use more at the start of the journey, narrowing down closer to booking. On average, the use of three channels is the highest ranked answer across all stages.

While search is the most cited across all stages, TV’s results are probably the most interesting. 31% recalling it at the inspiration stage, but only 10% when booking – cementing its role as an emotional trigger channel for those at the start of the journey. Newspapers and magazines also follow a similar pattern, being valued more at the start than towards the end.
How have consumer travel purchase behaviours changed?

When we asked people to compare their booking behaviours pre-pandemic, we can see that consumers feel that their approach has changed. Younger respondents are more likely to express indecision, with clarity of reasoning getting stronger as respondents get older.

A new dependence on cancellation policies and a new awareness of COVID-19 information are the fundamental and clearest changes to people’s lives. The impact of testing and restricted destinations is the most notable of pandemic-related responses.

For those aged under 35 and 35-54, cancellation policies are the most common response, but for those 55-74-year-olds, we see COVID concerns being the top response, highlighting just how important it is to target these age groups with accurate and supportive information.

Those dreaming are more likely than average to suggest that ‘health and safety’ and ‘traffic light changes’ are the biggest adjustments in their booking approach, again highlighting a sense of caution before going any further with planning.

Subject to all these changes, holiday planning is taking longer, people are booking later (or just waiting until the last-minute) and people are seeking greater support and customer service from reputable travel companies.

Undoubtedly, COVID protocols and fluctuating traffic light systems have reduced consumer confidence, forcing people to become even more destination-focused than they were before and more concerned with the value of their trip.
WHAT THIS ALL MEANS FOR TRAVEL MARKETERS

So, we’ve reached the end of the journey. What can we, as marketers, take away from real holidaymakers to understand what’s changed and what’s remained when it comes to the path to purchase? Here we join the dots, connect the mindsets, and reveal our thoughts on how best brands can reach people who are on the verge of their next great escape.

To best understand this, travel brands must zoom out of their day-to-day, take a step in their customers’ shoes and go on that journey themselves. So, let’s do just that:

Dreaming

Of course, people have always wanted holidays, but the pandemic took this level of want to a whole new level of need. The dreaming stage is now a more conscious, cautious, and wary place to be.

Our research shows that dreamers are dreaming four to six months ahead of taking a break, with the intention to book two to three months before going away. This gives brands a three-month window to speak to the dreamer who’s on the verge of researching their holiday, continually selling the benefits of a much-needed break.

The best way to speak to dreamers is to set off an emotional need. Our research shows that three of the top triggers for thinking about a holiday are excitement, a need to get away and ticking off the bucket list. With this, TV, or any form of video, is king. Why? Because it’s the ideal blend of sound and vision that gives whatever someone is trying to say both memorability and longevity. We bet anyone reading this can still remember their favourite childhood TV ads.

Sources: Les Binet and Peter Field, Media in Focus: Marketing Effectiveness in the Digital Era, IPA (Figure 01)

The dreaming stage begins when the ‘need’ for a holiday becomes a reality but, against COVID-19, crossing this line is easier said than done. Now the destination is the first functional decision.

Brand-building and sales activation work over different timescales

Sales uplift over base

Time

Short term effects dominate - 6 months

Sales activation / Short-term sales uplifts

Brand-building / Long-term sales growth

This idea of priming people months in advance sits perfectly with one of marketing’s most important theories - the long and short of it. This concept states that brands should run emotionally led brand-building activity for at least six months in order for key messages to begin to embed themselves in people’s minds.\(^6\)
Planning
A successful trigger then moves the consumer onto the second stage: planning. When questioned about what factors are influential in choosing when and where to go away, unsurprisingly, our Britain-based respondents prioritised weather. The notorious maker and breaker of holidays abroad. Naturally, flight times are the next priority, along with good accommodation reviews and a suitable total cost.
Planning has always been the ‘longest’ stage of the journey and, through our research and understanding, it’s clear that this period is now even longer. Time away from travel has allowed many to just sit and over-research, over-analyse - making this period a mini journey of back-and-forth, culminating in an extra stage that arrives just before booking.
We call this extra stage a period of pause. Either people have their eyes on a certain prize and are eagerly waiting for that destination to become more accessible, or all the research has been done and people have decided that they’re only willing to book when certain matters become simpler (i.e., with vaccinations or testing). Spontaneity has, for the time being, gone out of the window.
Brands must ask themselves why they believe their company is the right choice without leading with price - yet. It will help them if they have effectively delivered the initial emotional trigger during the dreaming stage.

Booking
Once the consumer is satisfied with their planning, it’s time for the important biting-the-bullet stage: booking. Here, our research shows cost is just as much related to value as it is to an attractive price tag. In a pandemic world, value is linked to the experience itself. Good value is not having to quarantine, it’s not having to endure curfews or restrictions in the destination – more so than getting a special offer or a cheap deal. If booking involves costly add-ons like testing, people want to ensure their end-experience is going to be worth it.
Our research also stressed that trust is key for getting people to book their holidays. The way to build this trust is again easier said than done because, for some, trust translates as familiarity, i.e., based upon past experiences. So how does a brand create trust for a person that is yet to experience them?
Well, as outlined above, this is also the stage when people are most likely to want to speak to a travel professional. Offering consumers easy ways to get in contact and the opportunity to talk to real experts really could make a difference. Trust also comes down to what you say and where you say it.
What you say means listening to consumer needs and addressing them with clear, consistent messaging. Additionally, ‘where’ brands say their message is just as important, with research papers (from the likes of Edelman and Thinkbox) revealing the most trusted media sources tend to be those more traditional, tangible channels such as print, radio and TV.
As brands attempt to shift the status of those ready-to-bookers, clear cancellation policies, flexible and free amends all need to be readily available and at the forefront of messaging. By their functional nature, search and other activation channels should be used here, where price points can also be communicated – another key factor in getting people over the line.

To talk to planners, brands must, above all, be helpful and be a reliable source of information. Marketers should move messaging from the purely emotional into the helpfully functional.

During the pandemic, a new stage has emerged: the period of pause that sits right at the end of planning and just before booking.
Experience

Accommodation is important throughout the purchase journey but really comes into its own at the experience stage. Our research shows that cleanliness is the number one signifier of a good holiday experience - a concern that has undoubtedly been heightened by the pandemic. Safety becomes a high expectation once people are on their holidays, stressing the importance of ensuring good reviews match the real deal. Brands shouldn’t make cleanliness a nice-to-have or be shy about communicating its glory; if you’re proud of your policies, then share them - especially in the post-booking/pre-departure period.

Of course, holidays are all about creating memories - something people are very much craving in 2021 and beyond. It’s no surprise that after clean accommodation, having a positive and memorable experience is important to people, again something we can link to this idea of good value. Making memories isn’t so much related to having a packed agenda either, as having things to do and plenty of amenities aren’t rated so highly within our research. It indicates that a good price is more linked to a good feeling and a money-can’t-buy sense of escapism.

Engaging with people whilst on holiday is often seen as an afterthought but, for brands, non-intrusive welcome packs on arrival are a great way to grab the attention. These don’t need to be large or very expensive; simple event guides, key local phrases, restaurant recommendations and vital destination COVID information all take minimal effort to collect but can make such a difference to someone visiting for the first time. A thoughtful way to ease people back in.

Advocacy

Finally, once the holiday is over, our research finds people advocate their holidays in different ways, depending on the quality of their experience. If enjoyable, people are more likely to share their positive experiences on public forums, i.e., social media or online review sites. If negative, they are more likely to go back to the travel provider in the first instance. Of course, generating advocacy is probably the hardest of all stages to master since it is influenced by the customer’s journey in its entirety. For instance, holidaymakers will review very differently depending on their expectations. If they researched and booked well in advance, or used a company they’ve used before, their feedback will differ to the experience they might have with a last-minute offer or with a company they’ve never travelled with before.

Nonetheless, brands should encourage people to share memories through welcome back emails, referral schemes and social media competitions. Whilst loyalty in travel is generally low, if there’s a value exchange taking place, then having someone associate a positive experience with your brand can be worth ten times more than paid advertising could ever generate.
Audiences

How do we best communicate to these different audiences?

If this research has shown us anything, it’s that whilst a lot of things have changed due to a global pandemic, one thing that hasn’t is the sought-after escapist nature of travel itself. As marketers, our job isn’t just to understand the new changes, it’s to link them to real customers that we can find and speak to practically and personally.

Through our research, we have been able to create a set of behaviours distinct to three audience clusters: those under the age of 35, those 35-54 and those aged 55-74. In this section, we lay the foundation for how to talk to these audiences across each stage of the journey.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Dreaming</th>
<th>Planning</th>
<th>Booking</th>
<th>Experience</th>
<th>Advocacy</th>
<th>Reaching This Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;35</td>
<td>When it comes to initial motivation, the excitement of going away is key.</td>
<td>Whilst still important, the young are less likely to be concerned with COVID-19 information. They value more practical reasons such as length of flight and the familiarity of destination.</td>
<td>Younger consumers are more likely to base their decision on price. It’s unsurprising, therefore, that refunds are more likely to encourage them to book.</td>
<td>Whilst on holiday, this group are more likely to want to look for things to do.</td>
<td>The sharing of both positive and negative experiences takes place on social media.</td>
<td>This group is more engaged with travel professionals throughout the purchase path, though less likely at the point of booking. They rate the role of the travel company earlier in their decision-making process. Younger consumers have seen brand advertisements and the messages within them instigate trust. Paid advertising plays a key role in inspiring this group, all the way through to converting them to purchase.</td>
</tr>
<tr>
<td>35-54</td>
<td>The initial trigger to travel is to take a much-needed break from everyday life. With busy lifestyles, the date of the holiday is their first decision.</td>
<td>Here this group is more likely to value the proximity of the arrival airport and the total cost.</td>
<td>As with the younger segment, when they’re ready to book, price is more likely to be the key motivator, but it is value for money that is key.</td>
<td>With holidays seen as a need, it’s no surprise that this group is more likely to look for a pool/beach to relax by. Essential information for this group includes the weather forecast at the destination.</td>
<td>Sharing the experience depends on how satisfied they are – good reviews are shared on social, whilst bad reviews go straight to review sites.</td>
<td>Like the 35-54s, the sharing preference is split. Good times are shared with friends and family, whilst negative experiences go straight to the holiday provider.</td>
</tr>
<tr>
<td>55-74</td>
<td>The oldest age group in our research is more likely to be triggered by the desire to see specific countries with the destination being the first decision they make.</td>
<td>This group is more likely to prioritise destination, COVID-19 information, and weather, followed by suitable flight times. Accommodation reviews are also carefully considered before a booking is made.</td>
<td>Unlike other groups, they’re not as likely to look at price – instead trust is at the top. Trust for this group comes notably from brand experience, i.e. previous customer experience and reputation.</td>
<td>This age group is more likely to look for cleanliness.</td>
<td>Social is used to both inspire and support this group to plan their holiday. Despite being less likely to speak to a travel professional when organising a break, this audience is more likely to engage with a travel professional when actually on their holiday.</td>
<td>This group seeks plentiful information to make them feel more comfortable about travelling, heavily using several sources including travel companies and search engines at each stage in the decision journey.</td>
</tr>
</tbody>
</table>

Statistical significance used to highlight specific audience traits.
SUMMARY & KEY TAKEAWAYS

Well, there we have it: a trip down travel lane with the holiday makers themselves and an insight into the consumer journeys of 2021 and beyond. Digging beneath the surface, it’s clear that the core stages haven’t gone anywhere but undoubtedly new behaviours have emerged because of 18 months of twists and turns.

The good news is that consumer confidence is in a better place than where it was a year ago, but to convert those ‘cautious but optimistic’ headspaces into ‘let’s live our best lives’, marketers must ensure they’re adapting their communications at each stage of the journey. We’ve seen that this starts with an emotional trigger at the top, followed by clear information delivery and reassurance in the middle, with plenty of trust and value towards the end.

We’ve also learnt that there are four key changes to the travel consumer’s path to purchase. These are:

1. **Destination choice holds a new priority within the early dreaming stage.**

   With many marketers approaching a critical stage in planning for the upcoming 2022 season, understanding the motivations at each stage of the path to purchase is essential to ensure the right messages are being prepared via the right media channels. Our research shows that this is heavily influenced by demographic. Younger generations see travel as exciting, holiday planning as fun and align with brands that share their values.

   As consumers get older, holidays become more of a need and an opportunity to connect with others, with brand trust playing a considerably more important role. Brands must keep questioning themselves as to who’s at the receiving end of their communications and continually align strategies with changing protocols and changing behaviours.

   At Accord, we like to call ourselves travel experts. We’ve witnessed plenty of highs and lows since we started in 1988, but nothing could quite prepare us for the events of the past year-and-a-half. Whilst this might be a period that many people want to forget, we can be grateful it’s given us a chance to better understand the people we market to everyday – the people who, after all this time, really deserve a great escape.

2. **A new stage has emerged: the period of pause that sits right at the end of planning and just before booking.**

   Using qualitative and quantitative data, it’s a process that requires creativity, thinking with factual and statistical data to plan and propose effective marketing strategies that solve clients’ biggest challenges. His fascination with people means he loves getting to grips with audiences; being able to tell clients things they didn’t know about the people visiting their site or engaging with their brand and coming up with strategies and campaigns to target them. A thought leader and industry event speaker, he also regularly contributes content to industry blogs and trade publications.

3. **Flexibility as a reassurance message can help negate the fear of cancellation and disruption.**

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4. **Advocacy has never been so important.**

   Powerful word of mouth advertising can sway those who are nearly ready to book, convincing them that the magic is still there and it’s worth the plunge.

   Joining Accord in September 2018 as a Research & Insights Executive, Eloise was promoted into a copywriting role in May this year. Self-motivated, pro-active and collaborative, she is responsible for crafting original, engaging and on-brand copy-driven comms across a variety of channels, ensuring each one speaks with the required tone of voice. An imaginative writer with a keen eye for detail, her words inform, inspire, educate and engage. Adept at managing multiple projects, typically with short deadlines, copywriting for Eloise is all about creativity, thinking outside the box and understanding the nuances of writing for each different platform.

   **Kara Bennett**
   **Head of Analytics**

   With years of experience in qualitative fieldwork and project management, quantitative and qualitative analysis, research and reporting – Kara is our data guru! Her ability lies in turning consumer data into meaningful insights that accelerate our clients’ growth. Appointed Head of Analytics in 2013, she plays a key role in defining measurement strategies, identifying insights through analysis and, ultimately, ensuring marketing effectiveness. Her favourite topics include attribution, forecasting and share of search.

   **Jasman Ahmad**
   **Strategy Director**

   Appointed Strategy Director in April 2018, Jasman is responsible for combining creative thinking with factual and statistical data to plan and propose effective marketing strategies that solve clients’ biggest challenges. His fascination with people means he loves getting to grips with audiences; being able to tell clients things they didn’t know about the people visiting their site or engaging with their brand and coming up with strategies and campaigns to target them. A thought leader and industry event speaker, he also regularly contributes content to industry blogs and trade publications.

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   **Sky News**

   **Silver Travel Advisor**
   https://www.silvertraveladvisor.com/travel-industry-reports

   **Statista**

   **Air Travel News**
   https://www.atn.com/2021/07/22/cta-research-travelers-still-confident/

   **Google - How Micro-Moments Are Reshaping the Travel Customer Journey**

   **Thinkbox – Signalling Success.**
   https://www.thinkbox.co.uk/research/thinkbox-research/signalling-success/
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