‘THE BIG SQUEEZE’ IS A MAIL METRO MEDIA RESEARCH SERIES THAT TRACKS THE ONGOING IMPACT THAT THE COST OF LIVING CRISIS IS HAVING ON CONSUMER’S FINANCES AND BEHAVIOURS ACROSS A BROAD RANGE OF CATEGORIES.

EACH WEEK WE ASK OUR MATTERS COMMUNITY MEMBERS ABOUT THEIR BEHAVIours IN ONE CATEGORY TO ASCERTAIN IF AND HOW IT HAS BEEN IMPACTED BY THE COST OF LIVING CRISIS.

OUR AIM IS TO OFFER USEFUL INSIGHTS AND PRACTICAL GUIDANCE ON HOW BRANDS CAN NAVIGATE THIS DIFFICULT AND TUMULTUOUS PERIOD.

NEXT IN THE SERIES IS TRAVEL AND OUR RESEARCH EXAMINES HOW THE COST-OF-LIVING CRISIS IS IMPACTING ATTITUDES AND BEHAVIOURS TOWARDS HOLIDAYING IN 2022 AND BEYOND.
**METHODOLOGY**

**APPROACH:**
20 mins online survey, respondents recruited through Matters Community

**FIELDWORK DATES:**
1. 14th June 2022 – 20th June 2022
2. 26th January 2022 – 9th February 2022
3. 1st October 2021 – 12th October 2021

**SAMPLE:**
1. 773 participants
2. 606 participants
3. 386 participants

Weighted to be representative of the MMM weekly audience by gender and age

Within this research we asked our readers how they feel about travel and where and when they are going. Tracking from our previous waves of research allows us to understand how the cost-of-living crisis and current airport ‘chaos’ are impacting upon the plans of our readers.
WHAT WILL WE COVER?

1. KEY FINDINGS
2. TRAVEL SENTIMENT
3. APPETITE FOR TRAVEL
4. TRAVEL CONCERNS
5. BEHAVIOURAL TRENDS
6. TRAVEL AND MMM
PRIORITISATION OF TRAVEL

• Travel remains a priority for many with 2 in 5 stating they would make sacrifices to ensure they can still go on holiday.

• 1 in 2 say they have other spending priorities at this time. Some households are beginning to feel the squeeze of the cost-of-living crisis on their finances.

TRAVEL INTENTION

• Despite changing priorities, those who have travelled or intend to travel have substantially grown from February to June, as numbers begin to approach those similar to a ‘normal’ (pre-COVID) year.

• Noticeably UK travel intention has grown most significantly since February, with UK short breaks seeing the biggest increases.

KEY FINDINGS

SUMMARY
KEY FINDINGS

SUMMARY

TRAVEL CONCERNS

• Concerns surrounding COVID-19 have gradually fallen since February but have been replaced by other concerns.

• 3 in 4 currently hold concerns surrounding personal finances and holiday affordability, this represents a significantly higher proportion of our readership than in February.

• 3 in 4 currently hold concerns surrounding airport and flight disruptions.

FUTURE TRAVEL TRENDS

• 2 in 5 are considering booking their 2023 holidays and short breaks this year – a majority are doing so because it gives them something to look forward to and they enjoy planning their holidays early.

• 1 in 4 are concerned that prices may rise going forward and want to avoid paying more in the future. 1 in 3 are on the lookout for early booking deals.
PACKAGE HOLIDAYS

- 2 in 5 said they are more likely to consider a package / all-inclusive holiday going forward.

- Elements of package holidays have become more appealing to holidaymakers since February. Factors such as protection should something go wrong and helping to control costs / have seen significant increases.

NEWSBRANDS AND TRAVEL

- 2 in 3 of MMM’s readership can recall seeing travel advertising recently in newsbrands (newspapers and news websites), making it the most recalled media format for travel ads.

- 2 in 5 professed an increased appetite for holidays after seeing travel and holiday advertising.

- 1 in 3 said newsbrands assist or inspire them when choosing a holiday, second only to personal recommendations from friends and/or family.

KEY FINDINGS

SUMMARY
TRAVEL SENTIMENT
TRAVEL AND HOLIDAYS ARE AN IMPORTANT PART OF OUR READERS LIVES

Two-thirds of our readers agree travel and holidays are good for their mental health

To what extent do you agree or disagree with the following statements about travel and holidays in general? Net: agree

- **64%** Travel and holidays are important for my mental health
- **63%** I enjoy planning my holidays / short breaks
- **62%** Travel and holidays are an important part of my life
- **46%** I spend a lot of time thinking about holidays / short breaks

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
AS THE COST-OF-LIVING CRISIS BEGINS TO TAKE HOLD, THE PRIORITISATION OF TRAVEL SPEND IS FALLING

Q - To what extent do you agree or disagree with the following statements about travel and holidays in general? Why?

PRIORITY

33%

I would prioritise spending on my holidays and travel over most things

“Since Covid, we have stayed at home and now feel it is essential that we get away and relax. Just to look at a different county and look out of other windows.”

“Holidays are very good for my well-being and I get a lot of pleasure out of planning and anticipating them.”

In February 53% agreed with this, showing realities are changing readers’ sentiment

CONCERN

48%

Holidays are good, but I have other spending priorities at this time

“Keeping my finances ticking over and my head above water! In 2016 I was fine financially despite having retired in 2012, I was able to travel in the UK and very occasionally in Europe but my annual trips to Australia did come to an end.”

“I think keeping a grip on money right now is important as the future doesn’t look good.”

“I can’t afford to go abroad on my pension, but I do like a short break. Unfortunately food and energy are taking all my income and I haven’t any left over to save for holidays.”

“I have health issues which make the cost of travel insurance too much to afford, so my priorities are to pay off debts and manage the increased cost of living.”

“The hair raising inflation in almost everything has to be factored in, holidays are good for the soul, but you must be realistic.”

“I am the carer for my wife and holidays are not on our lists. We are happy enjoying being at home with visits from our Children, Grand Children and Great Grandchildren. Who could ask for more?”

Source: Travel x Big Squeeze – June 2022 | Travel in 2022 – February 2022

Base: 773 respondents | 606 respondents
WHO ARE THOSE WHO PRIORITIZE HOLIDAYS?

Readers aged 35-54 are 25% more likely to prioritize holidays.
Those working full-time are 27% more likely to prioritize holidays.

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents - cut by those who prioritize spending & travel
## SACRIFICE

<table>
<thead>
<tr>
<th>40%</th>
<th>I would make sacrifices to ensure I can go on holiday</th>
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<tbody>
<tr>
<td>“Would rather spend money on holidays and experiences than on goods. Seeing new places is a wonderful thing to do, and worth scrimping in other areas to save up for.”</td>
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</tbody>
</table>

| “I decided to sell my house because the maintenance costs meant that I was not able to spend as much on holidays as I wanted, now I rent a small flat and have plenty of spare cash for my holidays!” |

| “With the recent rise in the cost of living, I’ve had to forfeit certain luxuries, so that I can set aside money for a Summer holiday abroad. I have reduced my consumption of alcohol, takeaways and coffees.” |

| Q - You said that you would make sacrifices to ensure you can go on holiday, why is this? What sacrifices have you made to ensure your holidays go ahead this year? |

| SACRIFICE | "I think it’s important to have a break, and a change of scene. I enjoy going to new places or travelling to catch up with friends. I avoided social situations beforehand to ensure I had the best chance of not catching COVID and ruining the trip.” |

| “We have family abroad so we try and meet up abroad and our families are the most important thing to us. To enable us to go away we have stopped having take-away food and any treats via the weekly shop. I personally have reduced buying cosmetics and new clothes and I really think about every purchase I make. I recycle my old clothes at car boot sales and look for any opportunity to save or reduce expenditure.” |

| Due to covid have not travelled for 2 years until March of this year. Being a single father to adult children I try to pay for and organise family holidays for us. They are really important to me... And them.” |

| “It’s always a balance of what to do with the time for a start, to travel or do things in or around the house. Now there is the added cost implication with rising costs, so it becomes a choice of cutting spending in other non-essential areas and adjusting essential costs to allow for money still for holidays.” |

| “Cutting back on eating out and some day trips out.” |

| Demographic of those who would make sacrifices to ensure their travel |
| --- | --- | --- |
| 18-34 | 34% | i135 |
| 35-54 | 36% | i113 |
| 55+ | 29% | i71 |

<table>
<thead>
<tr>
<th>Index</th>
<th>i98</th>
<th>i102</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>52%</td>
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</table>
APPETITE FOR TRAVEL
OVERSEAS TRAVEL INTENTION GROWING BUT POTENTIALLY UNDER THREAT AGAIN FROM UK BREAKS

Lower costs and less disruption likely to drive increased demand for UK breaks

Q - Which, if any, of the following holidays or short breaks would you usually take in a 'normal' year? (Unaffected by COVID-19)
Q - Which, if any, of the following holidays or short breaks have you taken or booked to take in 2022?
Q - Which, if any, of the following holidays or short breaks do you intend to take in 2022 but haven’t yet booked?

Source: Travel x Big Squeeze – June 2022 | Travel in 2022 – February 2022
Base: 773 respondents | 606 respondents

Short breaks: normal 57% v June 66%
Holidays: normal 32% v June 35%

Short breaks: normal 24% v June 22%
Holidays: normal 44% v June 42%

Short breaks: normal 9% v June 10%
Holidays: normal 27% v June 23%
CITY BREAKS ARE THE TOP GETAWAY OF CHOICE WITH 3 IN 5 LIKELY TO TAKE ONE IN THE NEXT 12 MONTHS

2 in 3 with children under 16 are likely to take an all-inclusive holiday in the next 12 months

Q - Please indicate how likely or unlikely you are to take each of the following types of holiday or short breaks in the next 12 months? Net: Likely

Metro: 70%
Have kids: 65%

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
THE UK AND EUROPE ARE TOP DESTINATIONS

North America continues to hold appeal with other long-haul destinations expected to bounce back in the future

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
RELAXATION, GOOD WEATHER AND FOOD AND DRINK HOLD SIGNIFICANCE TO ALL

18-34 are more wanting to experience a new culture, whereas sightseeing is of more importance to 55+

Q - Which, if any, of the following statements best describe what you want from your upcoming holidays / short breaks?

### 18-34

<table>
<thead>
<tr>
<th><strong>TO RELAX</strong></th>
<th><strong>GOOD WEATHER</strong></th>
<th><strong>FOOD &amp; DRINK</strong></th>
<th><strong>NEW CULTURE</strong></th>
<th><strong>TRY NEW THINGS</strong></th>
<th><strong>SEE SIGHTS</strong></th>
<th><strong>FAMILY TIME</strong></th>
<th><strong>BREAK ROUTINE</strong></th>
<th><strong>FRIEND TIME</strong></th>
<th><strong>NEW PEOPLE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>47%</td>
<td>47%</td>
<td>44%</td>
<td>42%</td>
<td>42%</td>
<td>41%</td>
<td>37%</td>
<td>29%</td>
<td>23%</td>
</tr>
</tbody>
</table>

### 35-54

<table>
<thead>
<tr>
<th><strong>TO RELAX</strong></th>
<th><strong>GOOD WEATHER</strong></th>
<th><strong>FOOD &amp; DRINK</strong></th>
<th><strong>FAMILY TIME</strong></th>
<th><strong>BREAK ROUTINE</strong></th>
<th><strong>SEE SIGHTS</strong></th>
<th><strong>NEW CULTURE</strong></th>
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<th><strong>FRIEND TIME</strong></th>
<th><strong>NEW PEOPLE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>58%</td>
<td>55%</td>
<td>54%</td>
<td>49%</td>
<td>39%</td>
<td>39%</td>
<td>33%</td>
<td>31%</td>
<td>23%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### 55+

<table>
<thead>
<tr>
<th><strong>TO RELAX</strong></th>
<th><strong>EAT &amp; DRINK</strong></th>
<th><strong>GOOD WEATHER</strong></th>
<th><strong>SEE SIGHTS</strong></th>
<th><strong>FAMILY TIME</strong></th>
<th><strong>BREAK ROUTINE</strong></th>
<th><strong>NEW CULTURE</strong></th>
<th><strong>TRY NEW THINGS</strong></th>
<th><strong>FRIEND TIME</strong></th>
<th><strong>NEW PEOPLE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td>67%</td>
<td>60%</td>
<td>57%</td>
<td>37%</td>
<td>34%</td>
<td>30%</td>
<td>26%</td>
<td>23%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
SEPTEMBER A KEY MONTH FOR FUTURE TRAVEL INTENTION

55+ adults are more likely to holiday in late spring and early autumn. 35-54 generally see peaks during May and the summer months.

Q - Looking at 2022/23, which months will you be taking your holidays / short breaks?

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
TRAVEL CONCERNS
CONCERNS SURROUNDING COVID-19 HAVE DECREASED AS THE YEAR PROGRESSES

Thinking about holidays and travel at the moment and the factors that may impact people’s travel plans, how concerned, if at all, are you personally about each of the following factors? Answer: Very concerned

February 2022  
40%  

June 2022  
24%  

Those very concerned about restrictions directly related to the COVID-19 pandemic are down by -26% points

27% say they are not concerned at all about restrictions vs 10% (Feb 2022)

February 2022  
38%  

June 2022  
24%  

Those very concerned about uncertainty due to COVID-19, such as changing government advice impacting their holidays is down by -14% points

29% are not concerned at all about COVID-19 uncertainty vs 10% (Feb 2022)

Source: Travel x Big Squeeze – June 2022 | Travel in 2022 – February 2022
Base: 773 respondents | 606 respondents
CONCERNS SURROUNDING FINANCES AND TRAVEL HAVE INCREASED SINCE FEBRUARY

3 in 4 are worried the cost-of-living crisis is going to impact their travel plans

Thinking about holidays and travel at the moment and the factors that may impact people’s travel plans, how concerned, if at all, are you personally about each of the following factors? Answer: Concern (any)

Those with concern about their financial situation impacting their travel plans has grown by +24% points

31% are very concerned due to the cost-of-living crisis vs 22% (Feb 2022)

Those concerned about the current affordability of holidays has grown by +18% points as people begin to feel the effects of the cost-of-living crisis

30% are now very concerned about the current affordability of holidays vs 22% (Feb 2022)

Source: Travel x Big Squeeze – June 2022 | Travel in 2022 – February 2022
Base: 773 respondents | 606 respondents
3 IN 4 ARE CONCERNED ABOUT THE CURRENT CHAOS AT AIRPORTS

55+ represent the most concerned group surrounding airport flight disruptions, cancellations or delays

Q - Thinking about holidays and travel at the moment and the factors that may impact people’s travel plans, how concerned, if at all, are you personally about each of the following factors? Answer: Concern (any)

Potential cancellations or disruptions to flights: 77%
Current delays and disruptions at airports: 75%
Delays renewing / getting a passport: 48%

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
BEHAVIOURAL TRENDS
MANY ARE CONSIDERING BOOKING AHEAD FOR 2023

1 in 4 of those considering booking their 2023 holiday this year are doing so due to concerns around price rises in 2023, early booking deals are also attractive.

Q - You said you are considering booking your holiday / short break for 2023, what reasons are you intending to book this year?

40% “I am considering booking my holidays / short breaks for 2023 this year”

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents – cut by those considering booking 2023 holidays

Up = significant at 90% confidence
SOME ARE DELAYING BOOKING THIS YEAR

2 in 5 of those who are delaying their booking are doing so because of financial concerns, 3 in 5 are postponing booking due to external factors such as the airport ‘chaos’

Q - You said you are delaying booking your holiday / short break at the moment, which, if any of the following statements do you agree with?

- 42% There is too much uncertainty around travel for me to book with confidence
- 39% I am waiting for the airport ‘chaos’ to be resolved before booking a holiday
- 30% There is too much uncertainty around my finances for me to book with confidence
- 27% I am holding off on booking a holiday until after the cost-of-living crisis
- 26% I intend to book closer to the point of departure
- 22% I am waiting for some deals / offers
- 18% I intend to go on holiday later than I normally would
- 16% I am holding off on booking a holiday this year due to health reasons

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents – cut by those delaying booking
ELEMENTS OF PACKAGE HOLIDAYS ARE BECOMING MORE APPEALING

Protection should something go wrong, offering good value for money and helping to control costs / manage a budget have become more appealing since February 2022.

Q - What, if anything, appeals most about booking a package holiday?

- Protected if anything goes wrong (59% in Jun-22)
- Easy to book (53% in Jun-22)
- Offer good value for money (47% in Jun-22)
- Provided by reputable companies (43% in Jun-22)
- Helps me control my costs / manage a budget (39% in Jun-22)
- Travel to the places I want to go (38% in Jun-22)
- Provide options in my budget (27% in Jun-22)
- Offer flexibility / ability to re-book (24% in Jun-22)
- Cheaper than booking independently (23% in Jun-22)
- Good for families (19% in Jun-22)

“...more likely to consider a package / all-inclusive holiday at this time”

Source: Travel x Big Squeeze – June 2022 | Travel in 2022 – February 2022
Base: 773 respondents | 606 respondents - cut by those considering package / all-inclusive holidays
TRAVEL AND MAIL METRO MEDIA
### TRAVEL ADVERTISING PLAYS KEY ROLE IN CREATING DEMAND AND BUILDING BRAND CREDIBILITY

**Q - Thinking now about travel companies and advertising, please state your level of agreement or disagreement with each of the following statements.**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeing travel and holiday companies advertising makes me want to go on holiday</td>
<td>59%</td>
<td>39%</td>
<td>47%</td>
<td>33%</td>
</tr>
<tr>
<td>Only credible travel and holiday companies would be able to advertise in newspapers</td>
<td>48%</td>
<td>36%</td>
<td>41%</td>
<td>32%</td>
</tr>
<tr>
<td>Advertising by travel and holiday companies adds to my understanding of the market</td>
<td>58%</td>
<td>36%</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>I am interested in seeing travel and holiday companies advertising at this time</td>
<td>51%</td>
<td>33%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>Companies would only spend money advertising if they had something worthwhile to say</td>
<td>54%</td>
<td>27%</td>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>I have looked for more information on travel products and services that I have seen advertised recently</td>
<td>43%</td>
<td>26%</td>
<td>31%</td>
<td>21%</td>
</tr>
<tr>
<td>I am reassured by the travel and holiday companies I see advertising</td>
<td>50%</td>
<td>25%</td>
<td>36%</td>
<td>16%</td>
</tr>
</tbody>
</table>

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Source: Travel x Big Squeeze – June 2022
Base: 773 respondents

TRAVEL ADVERTISING PLAYS KEY ROLE IN CREATING DEMAND AND BUILDING BRAND CREDIBILITY

- **See below**
- **= significant at 95% confidence**
TRAVEL ADVERTISING HAS HIGHER RECALL IN NEWSBRANDS THAN ANY OTHER MEDIA

2 in 3 can recall travel advertising in newsbrands recently

Q - In which if any of the following media have you seen travel advertising for recently?

- Newsbrands: 66%, 44%, 52%, 57%, 81%
- TV: 28%, 41%, 44%, 31%, 18%
- Magazines: 31%, 13%, 18%, 24%, 27%
- Social media: 33%, 24%, 21%, 21%, 28%
- Direct Mail: 9%, 9%, 8%, 8%, 8%
- Specialist websites: 16%, 18%, 12%, 17%, 5%
- Posters: 20%, 8%, 5%, 7%, 12%
- Radio: 12%, 8%, 6%

= significant at 95% confidence

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
NEWSBRANDS ARE A KEY SOURCE OF TRAVEL INSPIRATION

1 in 3 use newsbrands for travel inspiration

Q - Which, if any of the following assist or inspire you in choosing a holiday?

- Friend / family recommendations
- Newsbrands
- Review sites (e.g. TripAdvisor)
- Travel guidebooks / magazines
- Flight search engines (e.g. Skyscanner, Google Flights, etc.)
- TV shows
- Travel specific websites (e.g. Lonely Planet, etc.)
- Online travel agents
- Social media (e.g. YouTube, Instagram, Pinterest, etc.)
- Travel aggregator websites (e.g. Kayak, Expedia, etc.)

Source: Travel x Big Squeeze – June 2022
Base: 773 respondents
USE MAIL METRO MEDIA AND WATCH YOUR CAMPAIGN TAKE OFF

POWER OF MMM
69% of all expenditure on travel last year was spent by MMM readers.

17m MMM readers are planning a holiday this year

REACHING ALL AUDIENCES
6M pre-family adults reached by MMM monthly (51%)
12M parents reached by MMM monthly (64%)
14M post-family adults reached by MMM monthly (67%)

TRUSTED & ALWAYS ON
Travel sections in national press and our brands are trusted and highly engaged with.

1 in 2 Say our travel sections are a good source of advice

HISTORY OF SUCCESS
+30% average in consideration of brands featured in partnerships with MMM
51% average call to action score for travel category

MMM DATA SEGMENTS
- TRAVEL (6.4M)
- CRUISES (1.2M)
- LONG HAUL (1.3M)
IMPLICATIONS FOR ADVERTISERS
### Implications for Advertisers

#### Themes that Matter

**Book Now, Save Later**
- Many are considering booking their holidays for 2023 – earlier than usual. They are also on the lookout for deals and bargains to ensure they can get a good price on their holidays.
- Show how you can help consumers save money in the long term.

**The Whole Package**
- With the cost-of-living taking hold on peoples finances, many are considering package and all-inclusive holidays as a way to control their spending and protect themselves.
- Show how packages save effort and money but still offer great experiences.

**Breadth of UK Offering**
- With concerns surrounding airport ‘chaos’ and the cost-of-living crisis, many are opting for staycations as a measure to control costs and avoid disruptions.
- Show the variation offered by UK breaks both in terms of accommodation and experiences.

**Clarity through the Chaos**
- Not all airports and airlines are experiencing delays and disruptions. Keep consumers updated on the travel situation and reassure them (where appropriate) that the travel experience with your brand will be as normal as possible.

**Use Newsbrands**
- Newspaper reviews and advertising are key sources of inspiration when deciding where to travel.
- Use newsbrands to build your credibility, inspire wanderlust and encourage bookings.

### Priorities under Pressure
- **1 in 3** MMM readers would prioritise spending on their holidays and travel over most things, a reduction from **1 in 2** in February.

### Affordability an Issue
- **3 in 4** MMM readers are concerned about their current financial situation and the current affordability of holidays.

### Airport Chaos and Confusion
- **3 in 4** MMM readers are concerned about experiencing delays at airports and changing their plans.

### Holding Off for Now
- **2 in 5** MMM readers who are delaying booking their holidays are waiting for deals / offers before taking the plunge.

### Growth of UK Breaks
- **2 in 3** of MMM readers say that they booked, taken or intend to take a short break in the U.K. in 2022 – higher than a ‘normal’ year.

### Newsbrands Help Campaigns Take Off
- **2 in 3** of MMM readers recall seeing travel advertising recently. The highest amongst all media.

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