The
POWER of
VACATION
PLANNING

Planning vacation time is a simple, but meaningful way to improve happiness, boost morale, prevent burnout, and reduce stress. But the virtues of planning are being trumped by the realities of life and work.

The trouble is, many of the things that stop Americans from planning are based on assumptions that this study disproves.

Being proactive about vacation can be challenging, but for those who are willing to do the work, the reward is exponential. Not only do planners get to use the vacation time they earn, they get all the other benefits that follow.

Methodology

GfK conducted an online survey of 2,076 American adults, age 18+, who are working more than 35 hours a week and receive paid time off from their employer, including 501 managers who are company decision-makers. The survey was conducted September 20 – October 8, 2017. These data were weighted and scaled.

PROJECT:TIME OFF

We know the virtues of planning, but aren't good at it.

There is strong recognition among American workers that planning time off makes it easier to use the vacation days they earn—81 percent of respondents agree. Yet fewer than half (49%) take the time to plan their vacation days out each year.

It is not for lack of want. When this survey was fielded in late September and early October 2017, **55 percent of Americans said they intended to use all their vacation time.** But if the pattern of vacation usage in the U.S. continues, optimism in the fall gives way to calendar challenges by the end of the year, and far fewer of them will actually use all their time. The most recent data, from *The State of American Vacation 2017*, shows that just 46 percent of employees used all their time in 2016.

Planning is not always easy. The office calendar is difficult enough to navigate. Throw in personal commitments and the schedules of partners or children, and it can be a weedy mess to sort through. Nearly two-thirds (64%) of Americans say that lack of certainty about their personal schedule makes planning vacation time difficult. The second-biggest planning challenge (57%) is lack of certainty about work schedules.

TOP 3 BARRIERS to PLANNING VACATION

64%
Lack of certainty with personal schedule

57%
Lack of certainty with work schedule

50%
Coordinating children's schedules and extra-curricular activities
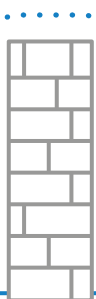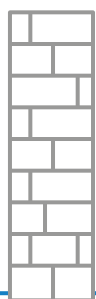
Giving More Notice

Giving more notice would help ease some of the planning challenges. While a strong majority (89%) of employees said they planned to take more time before the end of the year, nearly half (48%) said they had not requested any of that time off when the survey was fielded in early fall.

Generally speaking, employees are giving relatively little notice to their employer. Most commonly, employees are giving less than a week's notice when they take a day off (41%). Three-in-ten (29%) give notice a week or two beforehand, and just 17 percent give more notice than that. A smaller number of employees say they do not have a set pattern (9%) and do not have to tell anyone (3%). These numbers improve when employees are looking to take off a week or more, with most employees giving three to six weeks (27%) or one to two months (24%).

Employees on the lower end of the notice scale may be setting their vacation time up to fail. **Managers are near universal (91%) in saying they want to approve vacation requests, but a significant 43 percent say they are sometimes unable to because their employees did not provide enough notice.**

As a result, employees may be shouldering a bigger work burden than if they had planned further ahead and coordinated with their colleagues. The majority (51%) leave all or most of their work for when they get back, and a few (6%) are bringing their work with them on vacation. Forty-two percent get help from their coworkers and just eight percent ask for support from their boss.

These numbers get worse as employees move up the ladder. Managers are more likely to put work on themselves when they return (58%) or to take it with them (9%). They are less likely to lean on coworkers (35%), but more likely to reach out to the boss for help while they are out (13%).

HOW MUCH ADVANCE NOTICE
EMPLOYEES GIVE for VACATION

S M T W T F S

48%
6 Weeks or less

How Planning Benefits The Company

T he majority (62%) of employees say they have never been encouraged by their company to plan the use of their vacation days. Not encouraging is different than discouraging—just 11 percent say they have been discouraged by their boss from taking time off—but taking a more active approach to vacation planning has a benefit to companies.

It comes at odds that so few employees are encouraged to plan their vacation time, but so many managers wish they would.

Nearly eight-in-ten (78%) managers say it would be helpful to know their direct reports' vacation plans for the year at the start of their company's fiscal year. Managers agree that employees who plan out their time are being responsible, making it easier to plan coverage, and making it easier to approve their vacation requests. They also say that employees who plan are taking active steps to keep from burning out—a top fear of managers.

TOP 5 BENEFITS
of PLANNING, According to Managers

MANAGERS THAT AGREE

Employees are being responsible by giving as much notice as possible. **88%**

Employees are making it easier to plan coverage in advance. **85%**

Employees are making it easier to approve their requests by giving so much advance notice. **85%**

Employees are keeping themselves from burning out. **79%**

Employees are helping to prevent staffing issues. **79%**

But it is clear that employees have no idea their bosses feel that way. And how would they? Despite a commanding percentage agreeing it would be helpful to know their direct reports' vacation plans, nearly half (46%) of managers do not ask employees about those plans.

The boss is a powerful influencer, and the silence of so many managers sends a loud message—and the wrong one, at that.

Where nearly nine-in-ten (88%) managers think that employees who give their vacation plans for the year in advance are being responsible, just 68 percent of employees think that doing so makes them look that way. Fewer employees than managers feel that giving their vacation plans in advance will make it easier to plan coverage while they are away (78% to 85%) or that they are keeping themselves from burning out (73% to 79%).

For some employees, the idea of sharing their vacation plans for the year invites anxiety. About a quarter of employees fear that their boss wouldn't approve of them asking about that much time at once (27%) or worry that sharing all their plans for the year doesn't fit the company culture (25%). About one-in-five employees feel they do not have the seniority to make a request like that (22%) or fear that their commitment to the job would be questioned (21%).

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RECOMMENDATIONS

Companies need to give employees clear and direct encouragement to plan—from direct managers and top leadership.

Survey respondents were asked to select three things that would make planning less intimidating. More than half of Americans placed the boss encouraging them to plan (54%) and an update prior to the start of the year reminding them how much time they have to use (53%) in their top three responses.

Coordination is important for workplaces. More than four-in-ten (41%) said a planning meeting with their boss and colleagues to coordinate calendars would help them. Interestingly, just eight percent of employees say they currently have a meeting like that. The stark difference offers a clear opportunity for companies to enact a positive change that would benefit individuals and the organization.

Leadership's support matters dramatically as well. Forty-one percent also said they wanted to hear a directive to plan from the company's CEO or president. That's more than the 36 percent who said they wanted to hear the message from HR, and provides good reason for leadership to be vocal and supportive of vacation, and not just compartmentalize it as HR's responsibility.

5 IDEAS
for Companies to Improve Their PLANNING CULTURE

1 Encourage managers to have one-on-one conversations with their employees about planning their time in advance.

2 Send periodic reminders to employees so they don't lose track of their days—and end up resenting the vacation time they didn't get to take.

3 Hold a team planning meeting at the start of the year to coordinate calendars.

4 Have the CEO lend their voice to encouraging vacation usage and planning.

5 Ensure the HR team is getting the CEO's message worked through the organization in a meaningful way.

Employees need to plan their vacation time early (and often)—and don't just plan for what you have to do, plan for what you want to do.

Six-in-ten (60%) Americans say they are planning around events that are already on their radar, like weddings, graduations, or family events. Even fewer (47%) say that they plan out the use of their vacation days for the year.

Employees who take the time to plan out their year's worth of vacation time are more optimistic about being able to use their days by the end of the year. Where 55 percent overall said they expected to use all their earned time off by December 31, 61 percent of planners said the same. For non-planners, the number drops to 51 percent.

Planners put themselves in a better position by requesting that time off sooner. The majority (54%) of non-planners had yet to request any of the days they planned to use by the end of the year when the survey was fielded. Just 43 percent of planners said they had yet to request their time.

Employees who plan their vacation out are more likely to end up with days remaining at the end of the year because they are purposefully banking time for a longer trip in the future, compared to non-planners (29% to 23%). They are less likely to end up with unused days because they waited too long and found themselves unable to get away from work (17% to 20%) or because they could not find coverage while they were away (15% to 21%).

Planners are also able to take longer breaks. Where just 43 percent of non-planners say they typically take a week or more when they use vacation time, more than six-in-ten planners say the same. Making a weekend a long weekend has its place, but planners are setting themselves up to be able to take the trip of a lifetime by giving themselves time.

The DOs and DON'Ts of VACATION PLANNING

Do plan for your bucket list—not just your to-do list.

Do block your calendar, even if you are not sure of your plans just yet. Keeping the calendar clear creates the opportunity to take vacation.

Do talk to your manager about your vacation plans as far in advance as possible.

Don't make your bucket list unattainable. What is reasonable for you in the next few years?

Don't get swallowed up by details. You don't have to have your itinerary and reservations completely set to make a request. It's much easier to decide against taking time off that you have requested than it is to make a request too late.

Don't be afraid of being proactive and ensuring you can use the vacation days you earn.

So, where do you want to go?
It's time to plan.