

'At a glance' summaries

How to interpret the results
August 2017

CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND AND INDEXING AGAINST "GLOBAL" TOP 2 BOX SCORES. BOTH COLUMNS SHOW / BASED ON NORMALISED DATA

ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
<p><i>Consideration of <u>activity clusters</u> ranked on definitely would or very likely to consider. Indexing highlights differences vs. the 10-market average. An index score of 100 means the market is on par with this average, an index score above 100 indicates that the cluster is considered more within the market in question ...</i></p>		
Experiencing rural life & scenery	67%	110
Attending cultural / music / sports events	44%	82

... whereas an index score below 100 indicates that the cluster is considered less within the market relative to the "global" average.

MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY ON HOLIDAY TO ENGLAND) AND TOP 2 BOX (SOLE/VERY IMPORTANT REASON) IMPORTANCE OF ACTIVITY VS. CHOSING ENGLAND INDEXED AGAINST AVERAGE IMPORTANCE OF ACTIVITIES

ACTIVITY	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
<p><i>Consideration of <u>activities</u> ranked on definitely would or very likely to consider. The indexing of importance indicates whether a given activity is more or less important as a consideration driver. Here an index score of 100 indicates that the activity is of average importance as a driver of consideration vs. the importance of all activities within the market. Conversely, an index score above 100 indicates that the activity is of above average importance ...</i></p>		
Trying local food & drink specialities	70%	137
Visiting a National Park	52%	85

... and an index score below 100 indicates that the importance of the activity in question is average relative to all activities within the market.



Snapshot summary of the most defining characteristics of the market, typically majoring on skews relative to the 10-market average or calling out key findings relating to consideration of activities / clusters and the importance of the latter in driving consideration of England.

Detailed explanation of indexing and the colour coding applied to index scores to highlight more or less pronounced differences relative to the 10-market average or the in-market average.

The demographics block calls out any major skews in the demographic make up people who have booked an England holiday already, indexing scores within sub-groups against the total for the market.

DEMOGRAPHICS SKEWS: % ALREADY BOOKED ENGLAND HOLIDAY INDEXED VS. MARKET TOTAL

18-34	35-54	55+	Male	Female	AB	C1	C2DE
7%	4%	5%	7%	5%	6%	5%	6%
135	69	85	118	82	105	84	116

MARKET SUMMARY (EXAMPLE)

- Most likely reflecting the older demographic skew, action and outdoor activity clusters are not found majorly appealing, whereas rural life and scenery appeals more
- Aside from the classic drivers (famous places, buildings & historic monuments), the prospect of exploring villages / rural areas and local food / drink specialities have the greatest impact on consideration of England
- As a driver contemporary culture punches about its weight, but in terms of consideration, this isn't a key activity

INDEXING

Indexing shows relative differences, e.g. against the global average or the average importance of activities. An index score of 120 next to a 60% score indicates a global average of 50% as does an index score of 80 next to a 40% score.

COLOUR CODING OF INDEX SCORES

Index scores have been colour coded to highlight smaller or greater differences. ■=strong under-indexing (index <80), ■=moderate under-indexing (index 80-89), ■=moderate over-indexing (index 110-119) and ■=strong over-indexing (index 120+)

SOURCE

Online survey of 1,640 respondents. Fieldwork carried out between [02.17] and [03.17].

IMPORTANT FACTORS WHEN TAKING HOLIDAYS GENERALLY & ENGLAND DELIVERY AGAINST THESE

TOP 2 BOX IMPORTANCE (VERY IMPORTANT / EXTREMELY IMPORTANT) GENERALLY, AND INDEXED AGAINST GLOBAL IMPORTANCE, COMPARED TO TOP 2 BOX ENGLAND DELIVERY AGAINST THIS (SCORED 6 OR 7 WHERE 7 MEANS ENGLAND IS A REALLY GREAT PLACE FOR THIS)

IMPORTANT WHEN TAKING HOLS	DEFINITELY / VERY LIKELY GENERALLY	INDEX VS GLOBAL	DEFINITELY / VERY LIKELY ENGLAND	DIFF VS GENERALLY
Enjoying the natural world / scenery	77%	108	53%	-24%

Comparison of important factors when it comes to choosing a destination generally and England specifically. Expressed in terms of extremely important or very important and indexed vs. the “global”, 10-market average to highlight instances where a factor or “need” is more or less important in the market relative to the 10-market average. The difference – expressed in percentage points – between what’s important generally and when it comes to choosing England draws attention to areas where England suffers from a “capabilities gap” vs. areas where England is in a position of relative strength.

Consideration of locations indicates preferences for London vs. other England locations. Scores indexed to highlight differences vs. the 10-market average...

LOCATIONS CONSIDERED IN ENGLAND		INDEX VS GLOBAL
London	84%	103
Coastal or beach locations	71%	116
Modern towns and cities (i.e. outside London)	41%	81

... meaning that an index over 100 indicates a stronger preference for that location relative to the “global”, 10-market average (and vice versa).

QUALITATIVE SUMMARY

Additional observations from supplementary qualitative interviews conducted as part of this research programme

'At a glance' summaries

Market level data
August 2017

ATTITUDE TOWARDS TAKING A HOLIDAY TO ENGLAND IN FUTURE



NET England consideration

CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

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ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
Visiting famous / iconic attractions / places	88%	107
Experiencing city life	71%	100
Exploring history and heritage	70%	94
Outdoor leisure pursuits	68%	120
Experiencing rural life & scenery	61%	100
Attending cultural / music / sports events	37%	69
Challenge and / or action	25%	80

Iconic places are by far the greatest driver of visitation, whereas parks, gardens, museums and gourmet food have average or below impact on the decision to visit England

MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY ON HOLIDAY TO ENGLAND) AND TOP 2 BOX (SOLE/VERY IMPORTANT REASON) IMPORTANCE OF ACTIVITY VS. CHOSING ENGLAND INDEXED AGAINST AVERAGE IMPORTANCE OF ACTIVITIES

ACTIVITY (1-10 of 40)	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
Visiting a castle/palace/historic house	81%	125
Seeing world famous or iconic places	80%	164
Trying local food & drink specialities	76%	120
Visiting a historic monument	72%	120
Short (< 2hrs) country or coastal walk	65%	114
Exploring villages / rural areas	63%	116
Having a gourmet meal	60%	99
Visiting a park/garden	56%	79
Visiting a museum	55%	80
Visiting a National Park	52%	89

List continues overleaf ...





MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

ACTIVITY (11-20 of 40)	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
Long (> half day) country or coastal walk	49%	133
Shopping for clothes	46%	75
Experiencing local nightlife	45%	132
Food & drink tour or attraction	45%	95
Visiting a religious building	45%	61
Boating (boat trips, canal boating)	40%	70
Event associated with local traditions	40%	62
Shopping for locally made products/craft	38%	87
Visiting contemporary culture attraction	37%	115
Sunbathing on the beach/by a pool	34%	135

DEMOGRAPHICS SKEWS: % ALREADY BOOKED ENGLAND HOLIDAY INDEXED VS. MARKET TOTAL

18-34	35-54	55+	Male	Female	AB	C1	C2DE
14%	8%	2%	11%	7%	10%	11%	9%
152	87	25	117	79	105	114	102

MARKET SUMMARY

- At the level of activity clusters, outdoor leisure pursuits are considered much more widely than cultural events and challenge / action
- However, when it comes to actual activities, it is classic tourist attractions, history and heritage that are most widely considered and that most impact consideration of England
- Walks are quite widely considered and also have a relatively strong effect on consideration, but a pull factor more relevant to younger audiences is local nightlife, which is considered less widely but has a major impact on consideration

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IMPORTANT FACTORS WHEN TAKING HOLIDAYS GENERALLY & ENGLAND DELIVERY AGAINST THESE

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IMPORTANT WHEN TAKING HOLS	DEFINITELY / VERY LIKELY GENERALLY	INDEX VS GLOBAL	DEFINITELY / VERY LIKELY ENGLAND	DIFF VS GENERALLY
Rest and relaxation	80%	130	53%	-28%
Enjoying the natural world / scenery	73%	103	70%	-3%
Learning more about the destination / country	72%	108	71%	-1%
Treating / spoiling yourself / others	71%	127	51%	-20%
Fun for all the family	68%	119	52%	-16%
Seeing the most famous sights ...	59%	88	83%	+24%
Experiencing local culture	53%	85	62%	+9%
Learning about history and heritage	40%	69	78%	+37%
Thrill and excitement from activities / sports	27%	98	45%	+19%
Meeting new people	25%	69	56%	+32%
Achieving something challenging	24%	100	45%	+20%
Partying	15%	73	51%	+36%
Helping the local community / environment	14%	59	42%	+27%

BEEN TO ENGLAND IN PAST 3 YEARS INDEXED AGAINST GLOBAL

32%
Index 84

LOCATIONS CONSIDERED IN ENGLAND	INDEX VS GLOBAL
London	97
Historic towns and cities (i.e. outside London)	93
Coastal or beach locations	99
Countryside / villages	90
Modern towns and cities (i.e. outside London)	90

QUAL SUMMARY

- Typically reserved and on (on the surface) harder to impress, but often with a genuine curiosity about English life, politics, and the economy
- They feel they lack geographical interest at home (generally flat and uniform) so they seek it abroad in cliffs, mountains, and anything that feels 'rugged'
- They get excited about the outdoors and active experiences more than many markets, but aren't automatically impressed by England (e.g. they assume there are better/higher mountains elsewhere) so these activities need to show something special and unique about England too

