

# '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

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Market level data  
August 2017

**ATTITUDE TOWARDS TAKING A HOLIDAY TO ENGLAND IN FUTURE**



**90%**  
NET England consideration

**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
Visiting famous / iconic attractions / places	72%	88
Exploring history and heritage	71%	96
Experiencing city life	67%	94
Experiencing rural life & scenery	61%	100
Outdoor leisure pursuits	60%	105
Attending cultural / music / sports events	56%	104
Challenge and / or action	37%	120

The most considered activities are also the strongest drivers of visitation. Food/drink relatively key, but in the sense of local specialities (gourmet meals is an average driver)

**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
Seeing world famous or iconic places	73%	160
Visiting a castle/palace/historic house	71%	133
Trying local food & drink specialities	71%	145
Visiting a historic monument	70%	143
Visiting a museum	64%	123
Having a gourmet meal	64%	101
Visiting a park/garden	63%	102
Event associated with local traditions	63%	106
Short (< 2hrs) country or coastal walk	62%	95
Food & drink tour or attraction	61%	105

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
Exploring villages / rural areas	60%	109
Visiting a National Park	60%	97
Shopping for locally made products/craft	57%	96
Visiting an art gallery	53%	86
Visiting contemporary culture attraction	53%	112
Visiting a religious building	52%	89
Watching a play / musical	52%	81
Visiting places linked to family history	51%	100
Film/TV/Literature attraction	51%	97
Long (> half day) country or coastal walk	51%	83

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

18-34	35-54	55+	Male	Female	AB	C1	C2DE
22%	15%	3%	20%	11%	16%	14%	18%
141	97	18	126	68	103	91	119

### MARKET SUMMARY

- No major activity cluster skews, though above average consideration of challenge / action
- Local food/drink broadly on par with more traditional drivers, e.g. iconic places, buildings and historic monuments ...
- ... but gourmet food and food/drink related tours more average drivers of consideration
- Of the less widely considered activities, contemporary culture punches above its weight as a driver of consideration

#### INDEXING

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#### COLOUR CODING OF INDEX SCORES

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#### SOURCE

Online survey of 1,541 respondents. Fieldwork carried out between [02.17] and [03.17].





## 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
Experiencing local culture	65%	104	58%	-7%
Enjoying the natural world / scenery	64%	90	52%	<b>-12%</b>
Learning more about the destination / country	64%	95	62%	-2%
Seeing the most famous sights ...	63%	94	66%	+3%
Learning about history and heritage	60%	102	65%	+5%
Rest and relaxation	55%	89	44%	<b>-11%</b>
Fun for all the family	55%	97	51%	-4%
Treating / spoiling yourself / others	50%	89	48%	-2%
Meeting new people	41%	114	50%	+9%
Thrill and excitement from activities / sports	37%	136	41%	+4%
Achieving something challenging	35%	142	43%	+9%
Helping the local community / environment	31%	128	41%	<b>+10%</b>
Partying	26%	127	48%	<b>+22%</b>

## BEEN TO ENGLAND IN PAST 3 YEARS INDEXED AGAINST GLOBAL

**40%**  
Index 93

LOCATIONS CONSIDERED IN ENGLAND	INDEX VS GLOBAL
London	102
Historic towns and cities (i.e. outside London)	103
Countryside / villages	112
Coastal or beach locations	101
Modern towns and cities (i.e. outside London)	120

### QUAL SUMMARY

- Very into the history and heritage, and potentially culture (especially Shakespeare)
- Quite nervous travellers but feel calmer in England
- Love having their sense of fun and a bit of 'adventure-lite' encouraged in the way things are described – although actually quite middle of the road in terms of the actual activities and experience they take part in!
- Less comfortable driving in the UK – to the extent they can feel it's a risk to their life...

