

'At a glance' summaries Outdoor Activities

Activities

June 2018



How to read the summaries





About these summaries

Unless specified, results are an aggregate of 5 markets:
USA, France, Germany, Netherlands, UK

Only those who have participated in at least one activity on a recent holiday are included in the analysis

The number of respondents each slide of analysis is included at the bottom of each slide

How to read the indexing?

	>130	The index number refers to the difference to the overall average, where the average = 100.
	>115	
	<85	Dark / Light Green = significantly higher than average Orange / red = significantly lower than average
	<70	

**REGULARLY
/OCCASIONALLY
PARTICIPATED ON
PREVIOUS HOLIDAYS**

Have you done these activities regularly or occasionally on holiday? (Q11)

**ACTIVITY CROSSOVER
FOR FUTURE TRIP TO
ENGLAND**

What activities would you do on a holiday to England? (Q29) *The proportion that would do each activity in addition to the main one*

**ACTIVITY SELECTION FOR
FUTURE TRIP TO
ENGLAND**

What activities would you do on a holiday to England? (Q29)

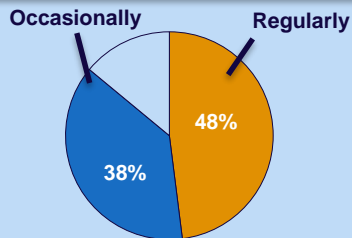
Sample size = 2,189

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

86% of have participated in gentle country walks whilst on holiday previously. The aged 55+ express highest levels of interest.



KEY AGE GROUPS

55-64:	95%
65-74:	93%
75+:	94%



ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

GENTLE COUNTRY WALKS WITH...	Overall
Hill-Walking or Full day walks	32%
Horse-riding	16%
Mountain Biking	13%
Road cycling	11%
Kayaking	7%
Climbing	6%
Coasteering	4%
Rafting	4%
Canyoning	3%
Surfing	3%
Windsurfing	2%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	60%	91	1st
Germany	68%	103	1st
Netherlands	72%	109	1st
UK	61%	92	1st
US	69%	105	1st

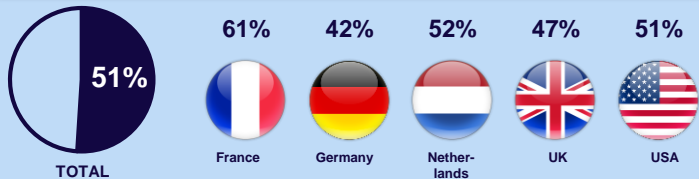
All markets select gentle country walks as their most popular activity for a future trip to England.

Hill-walking/full day walks, horse-riding and mountain biking are most likely to be selected alongside gentle country walks. Extreme activities are unlikely to be selected with gentle country walks.

*Index measures participation relative to other countries

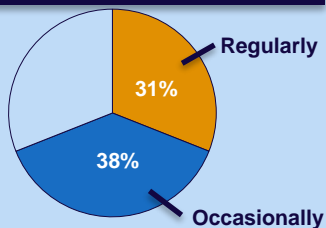
Sample size = 1,765

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Hill-walking is a very popular activity due to easy accessibility to many. Over two thirds of people have previously participated on a holiday.



KEY AGE GROUPS

35-44: 74%

45-54: 73%

HIGH

75%

LOW

60%



69%

68%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

HILL WALKING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	65%
Mountain Biking	20%
Horse-riding	17%
Road cycling	14%
Kayaking	11%
Climbing	10%
Coasteering	6%
Rafting	6%
Surfing	5%
Canyoning	5%
Windsurfing	4%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

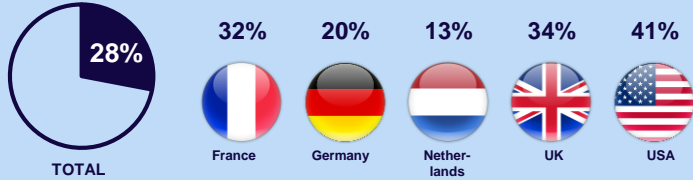
	%	Index*	Activity Rank
France	41%	124	2 nd
Germany	24%	73	2 nd
Netherlands	35%	106	2 nd
UK	26%	79	2 nd
US	37%	112	2 nd

All markets position hill walking/full day walks as the second most popular activity after gentle country walks.

Similar to gentle country walks, extreme activities are unlikely to accompany hill-walking/full day walks. Instead, gentle walks, mountain biking and horse-riding are preferred.

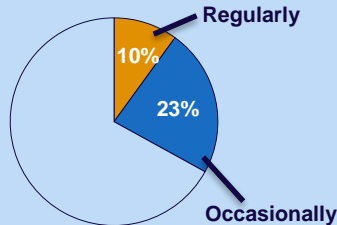
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Of those interested in the activity, 10% indicate they regularly participate and 23% occasionally participate in the activity on holiday. The US is a key market, and males over-index.



KEY AGE GROUPS

25-34: 42%
35-44: 37%

HIGH LOW

45% 22%
USA Germany

40% 26%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

ROAD CYCLING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	51%
Mountain Biking	34%
Hill-Walking or Full day walks	32%
Horse-riding	25%
Kayaking	12%
Climbing	12%
Surfing	9%
Canyoning	9%
Rafting	8%
Windsurfing	7%
Coasteering	7%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

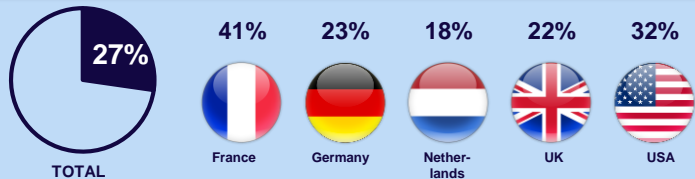
	%	Index*	Activity Rank
France	16%	107	5 th
Germany	8%	53	6 th
Netherlands	8%	53	5 th
UK	17%	113	3 rd
US	23%	153	4 th

The US are also more likely than other markets to select this activity for a holiday to England.

This activity is often paired with walking activities. Mountain Biking and Horse-riding are also often chosen to complement on a trip to England.

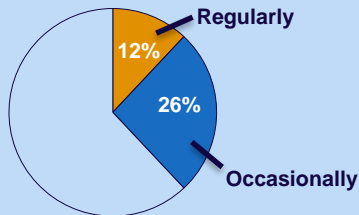
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

38% of those interested in a UK holiday involving outdoor activities have previously participated in Mountain Biking whilst on holiday. France is a key market and males over-index.



KEY AGE GROUPS

25-34: 48%
35-44: 47%

HIGH **LOW**

50% 29%



46% 29%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

MOUNTAIN BIKING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	49%
Hill-Walking or Full day walks	36%
Road Cycling	28%
Horse-riding	18%
Climbing	16%
Kayaking	14%
Rafting	10%
Surfing	9%
Canyoning	9%
Coasteering	8%
Windsurfing	7%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	21%	117	3 rd
Germany	17%	94	3 rd
Netherlands	15%	83	3 rd
UK	16%	89	4 th
US	19%	106	5 th

The French market are the most interested in Mountain Biking in England with 22% choosing the activity as part of a trip to England.

Walking and Road cycling are activities which are popular choices alongside mountain biking. Climbing and horse-riding are also of some interest.

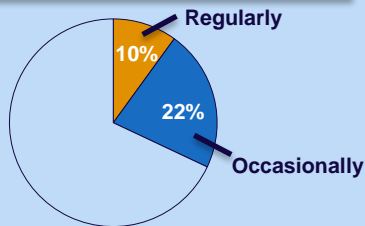
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

The proportion of people who have taken part whilst on holiday exceeds general participation at home



KEY AGE GROUPS

25-34: 38%
35-44: 36%

HIGH LOW

53% 24%



28% 35%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

HORSE-RIDING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	62%
Hill-Walking or Full day walks	33%
Road Cycling	21%
Mountain Biking	18%
Climbing	15%
Kayaking	13%
Surfing	9%
Canyoning	8%
Coasteering	7%
Windsurfing	6%
Rafting	6%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	17%	100	4 th
Germany	17%	100	3 rd
Netherlands	12%	71	4 th
UK	14%	82	5 th
US	26%	153	3 rd

The US shows great interest in taking part in horse-riding whilst in England, and it's the 3rd most popular activity for this group.

There is only minor crossover with extreme sports. Those opting to go horse-riding are prone to complimenting this with gentle country walks and hill-walking / full day walks.

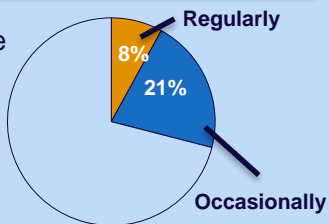
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

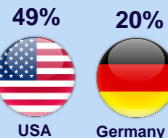
Regular kayaking goers are rare but over 20% indicate they occasionally go kayaking whilst on holiday presenting a good offering. US citizens are most likely to take part in kayaking.



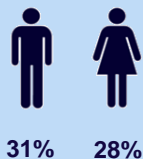
KEY AGE GROUPS

25-34: 38%
18-24: 37%

HIGH



LOW



ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

KAYAKING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	53%
Hill-Walking or Full day walks	40%
Mountain Biking	28%
Horse-riding	26%
Rafting	25%
Climbing	24%
Canyoning	22%
Coasteering	21%
Road Cycling	20%
Surfing	19%
Windsurfing	19%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	8%	89	6th
Germany	6%	67	7th
Netherlands	7%	78	6th
UK	11%	122	6th
US	11%	122	6th

UK and US are more likely be interested in kayaking during a trip to England, while Germany and Netherlands sit at the other end of the spectrum.

There are similar levels of crossover throughout suggesting that kayaking can have crossover with a range of other activities during a UK trip.

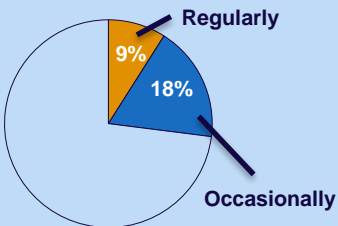
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Climbing participation is heavily skewed towards the younger demographics. The US exhibit a higher proportion of participation too with almost 2 in 5 having taken part in climbing whilst on holiday.



KEY AGE GROUPS

18-24: 42%
25-44: 38%

HIGH



LOW



30% 24%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

CLIMBING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	45%
Hill-Walking or Full day walks	36%
Mountain Biking	32%
Horse-riding	28%
Kayaking	23%
Road Cycling	20%
Surfing	17%
Rafting	16%
Coasteering	14%
Windsurfing	13%
Canyoning	12%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

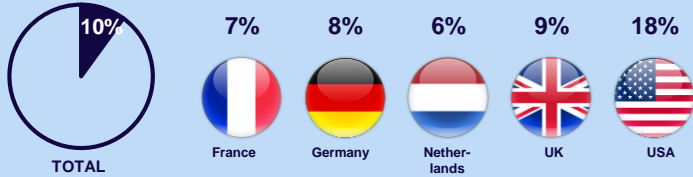
	%	Index*	Activity Rank
France	8%	89	6 th
Germany	11%	122	5 th
Netherlands	6%	67	7 th
UK	10%	111	7 th
US	10%	111	7 th

Germany, UK and US are most likely to say they'd choose climbing as part of a trip to England.

There is considerable crossover with climbing activity. Those interested in taking part in climbing whilst on a UK express interest in a wide range of other activities.

*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

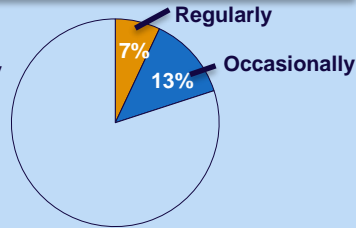
SURFING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	37%
Kayaking	29%
Mountain Biking	29%
Hill-Walking or Full day walks	28%
Climbing	27%
Horse-riding	27%
Windsurfing	26%
Road Cycling	22%
Rafting	19%
Canyoning	19%
Coasteering	18%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	3%	50	12 th
Germany	6%	100	7 th
Netherlands	4%	67	9 th
UK	9%	150	8 th
US	6%	100	10 th

REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Surfing appeals more to the younger age groups but only 20% of those interested in UK holidays have been surfing on holiday before. Much greater appeal for younger markets.



KEY AGE GROUPS

25-34: 31%
18-24: 27%

HIGH LOW

31% 16%



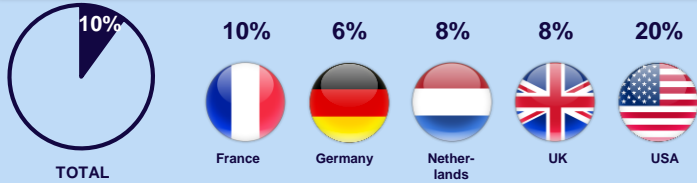
22% 17%

UK are the most interested in doing surfing in England with Germany and US having some reach also. Netherlands and France have very little interest in doing this activity in England.

Other water sports such kayaking, windsurfing and rafting attract greater reach to accompany surfing during a UK holiday.

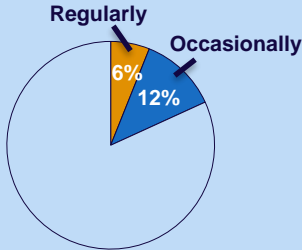
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

With low levels of reach and previous experience, canyoning appeals to the holiday market rather than regular participation. As with other high-intensity activities, US citizens are most open to trying canyoning.



KEY AGE GROUPS

25-34: 29%
18-24: 27%

HIGH **LOW**

32% 12%

 USA Germany



ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

CANYONING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	43%
Kayaking	40%
Hill-Walking or Full day walks	36%
Rafting	35%
Mountain Biking	33%
Horse-riding	29%
Road Cycling	27%
Climbing	24%
Surfing	22%
Coasteering	21%
Windsurfing	18%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	5%	100	8 th
Germany	3%	60	11 th
Netherlands	2%	40	12 th
UK	7%	140	10 th
US	6%	120	10 th

UK and US are more likely to take part in canyoning compared with other markets, but still the appeal is relatively low.

Kayaking and rafting appear to complement canyoning strongly. Other high-intensity activities are considered by many to go alongside canyoning.

*Index measures participation relative to other countries



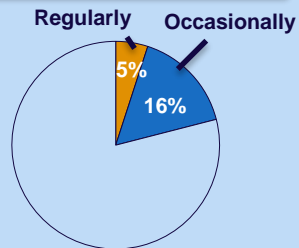
Sample size = 533

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

US exhibits are very strong association with rafting with almost half indicating some level of previous participation whilst on holiday. Regular participation levels are low, suggesting suitability for a holiday activity.



KEY AGE GROUPS

25-34: 27%
35-44: 27%

HIGH

43%



USA

LOW

12%



Germany



24%



18%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

RAFTING WITH...

Activity	Overall
Gentle Country Walks (2 hrs / 5 miles)	46%
Kayaking	38%
Mountain Biking	34%
Hill-Walking or Full day walks	33%
Canyoning	29%
Climbing	26%
Road Cycling	21%
Coasteering	21%
Surfing	20%
Windsurfing	20%
Horse-riding	20%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

Country	%	Index*	Activity Rank
France	5%	83	8
Germany	5%	83	9
Netherlands	5%	83	8
UK	5%	83	11
US	7%	117	9

There are low levels of interest in rafting as part of a England holiday.

Kayaking, mountain biking and canyoning go alongside rafting for around a third of those interested in rafting as part of a England trip. Horse-racing is of relatively little interest for those interested in rafting.

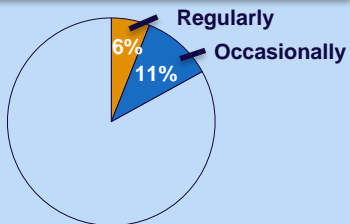
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Windsurfing has low reach, with only 6% regularly taking part whilst on holiday. Windsurfing has the greatest appeal to those from US.

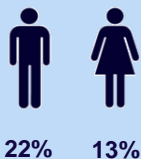


KEY AGE GROUPS

25-34: 24%
35-44: 22%

HIGH LOW

25% 13%
USA UK



ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

WINDSURFING WITH...	Overall
Kayaking	37%
Gentle Country Walks (2 hrs / 5 miles)	36%
Surfing	34%
Hill-Walking or Full day walks	29%
Mountain Biking	28%
Climbing	26%
Rafting	25%
Horse-riding	23%
Road Cycling	22%
Canyoning	19%
Coasteering	18%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	4%	100	11 th
Germany	5%	125	9 th
Netherlands	4%	100	9 th
UK	5%	125	11 th
US	5%	125	12 th

There is limited interest in windsurfing in England for all markets.

When windsurfing is selected, crossover with other water sports is strong. Kayaking and surfing are likely to be considered alongside windsurfing for a third. Gentle country walks amounts to the same likelihood – far less than it is alongside other, less intensive, activities.

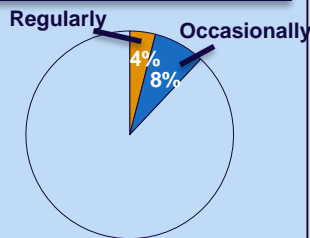
*Index measures participation relative to other countries

GENERAL PARTICIPATION IN ACTIVITY



REGULARLY/OCCASIONALLY PARTICIPATED ON PREVIOUS HOLIDAYS

Coasteering has very little reach throughout. Younger age groups have higher participation levels, but these are still below 20%. This activity has a slight male skew.



KEY AGE GROUPS

25-34: 19%
35-44: 16%

HIGH LOW

26% 7%



15% 9%

ACTIVITY CROSSOVER FOR FUTURE TRIP TO ENGLAND

COASTEERING WITH...	Overall
Gentle Country Walks (2 hrs / 5 miles)	51%
Hill-Walking or Full day walks	35%
Kayaking	32%
Mountain Biking	26%
Climbing	24%
Horse-riding	23%
Rafting	21%
Road Cycling	18%
Surfing	18%
Canyoning	18%
Windsurfing	14%

ACTIVITY SELECTION FOR FUTURE TRIP TO ENGLAND

	%	Index*	Activity Rank
France	5%	83	8
Germany	3%	50	11
Netherlands	3%	50	11
UK	8%	133	9
US	9%	150	8

Interest in doing coasteering in England isare low across all markets, although almost 1 in 10 of the US market are interested.

Kayaking and climbing are activities which appear to work well alongside coasteering.

*Index measures participation relative to other countries