

'At a glance' summaries Outdoor Activities

Market Level Data
June 2018



How to read the summaries





Markets included and base sizes for age groups

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 based on depends on is as follows:
USA = 501, France = 501, Germany = 515, Netherlands = 505, UK = 520

How to read the indexing?

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

UK ACTIVITY HOLIDAY INTEREST

Which describes your attitude towards taking a holiday to England in future? (Q6)

PREVIOUS PARTICIPATION ON HOLIDAY

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

NO. OF ACTIVITY HOLS IN LAST 3 YEARS

How many holidays including activities have you been on in the last 3 years? (Q12C)

POPULAR ACTIVITY HOLIDAY DESTINATIONS

Which countries did you visit on holiday? (Q16a)

BOOKING OF MAIN ACTIVITY

How did you book the outdoor activity element of your trip? (Q24)

ACCOMMODATION ON PREVIOUS ACTIVITY HOLS

What accommodation did you stay in? (Q21)

ACTIVITIES CHOSEN FOR FUTURE ENGLAND TRIP

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

DATE OF VISIT

What month would you prefer to visit England? (Q34)

TRANSPORT METHOD - ARRIVAL

Which transport would you use to travel around England? (Q39)

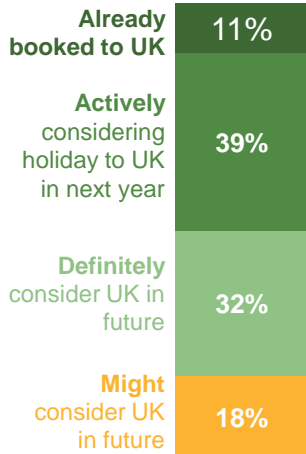


Half of the French market took 1 or 2 activity holidays in the past 3 years, which is fewer than other markets. Overall opportunity for a holiday in England including an outdoor activity is 31%.

INTERESTED IN A HOLIDAY IN ENGLAND INC. OUTDOOR ACTIVITIES

31%

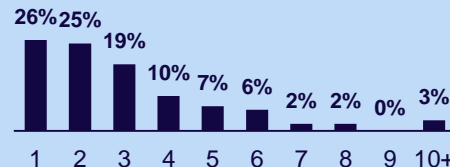
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PREVIOUS ACTIVITY PARTICIPATION ON HOLIDAY

ACTIVITY	REGULAR / OCCASIONAL	MARKET INDEX *
Gentle Country Walks (2 hrs / 5 miles)	87%	101
Hill-Walking or Full day walks	75%	110
Mountain Biking	50%	135
Road Cycling	38%	115
Kayaking	30%	103
Horse-riding	26%	84
Climbing	22%	81
Canyoning	18%	95
Windsurfing	18%	106
Rafting	17%	81
Surfing	17%	85
Coasteering	7%	58

NUMBER OF HOLIDAYS INC. OUTDOOR ACTIVITY (LAST 3 YEARS)



AVERAGE

3.07

MEDIAN

2.00

Half of the market have taken 1-2 holidays involving an outdoor activity in the past 3 years.

Mountain Biking, Road Cycling and longer walks are key activities for the French market with considerable reach of each.

*Index measures participation relative to US, France, Netherlands and UK



The French market indicate commercial renting and hostels are great alternatives to hotels – particularly for UK holidays. Bed & Breakfast is also a popular accommodation type for UK trips.

POPULAR ACTIVITY HOLIDAY DESTINATIONS

...MOST POPULAR COUNTRIES

	%	Index**
France	29%	171
Spain	21%	150
Italy	15%	136
United Kingdom	13%	108
Portugal	9%	180

...REGIONS

	%	Index**
NET: Europe	85%	106
NET: Americas	16%	73
NET: Asia	13%	108
NET: Australasia	5%	83

BOOKING OF MAIN ACTIVITY

	%	Booking Index*
Didn't make any bookings – just did them	62%	98
Booked one or more separate single day tours once I got there	19%	95
Booked a multi-day itinerary once I got there	9%	82
Booked one or more separate single day tours before I travelled	9%	90
Booked a multi-day itinerary before I travelled	10%	125

Pre-booking a multi-day itineraries is more popular for the French than for other markets.

Whilst mid-range hotels are most popular, commercial renting, B&Bs and hostels offer attractive alternatives for the French market. High-end hotels are of relatively low interest compared with other options.

ACCOMMODATION ON PREVIOUS ACTIVITY HOLIDAYS

	...ALL DESTINATIONS		...IN THE UK	
	%	Index*	%	Index*
Mid-range hotel (3*)	27%	96	28%	100
Rented apartment	23%	121	16%	94
High-end hotel (4/5*)	18%	82	14%	74
Home of friends	13%	130	13%	118
Commercial renting (e.g. Airbnb)	11%	157	17%	243
Budget hotel (2*)	11%	110	16%	123
Bed and breakfast	10%	71	24%	109
Tent / Camping	9%	69	13%	87
Hostel	8%	114	19%	190
Net: All paid	90%	98	94%	100

**UK was excluded from country destinations indexing

*Index measures relativity to US, France, Netherlands and UK



In line with previous participation tendencies, mountain biking and walking are commonly selected by French people as activities to take part in as part of a UK holiday

ACTIVITIES SELECTED FOR FUTURE TRIP TO ENGLAND

ACTIVITY	SELECTED	MARKET INDEX*
Gentle Country Walks (2 hrs / 5 miles)	60%	91
Hill-Walking or Full day walks	41%	124
Mountain Biking	21%	117
Road Cycling	16%	107
Horse-riding	17%	100
Kayaking	8%	89
Climbing	8%	89
Coasteering	5%	83
Canyoning	5%	100
Rafting	5%	83
Windsurfing	4%	100
Surfing	3%	50

TIME OF VISIT

	%	MARKET INDEX**
Jan-Mar	12%	92
Apr-Jun	50%	104
Jul-Sep	50%	98
Oct-Dec	10%	91



TRANSPORT METHOD - ARRIVAL

	%	MARKET INDEX**
Plane	46%	78
By water, with car	35%	106
By water, without car	12%	86
Train	35%	125

With the option of Eurostar travel, train is a popular transport method for the French market. More than one in three would utilise this offering to get to England.

Month of visit preference for the French market remains in line with overall trends – spring and summer are most popular, with November to March having relatively little interest.

*Index measures participation relative to US, France, Netherlands and UK

** UK was excluded from date of visit and transport arrival method indexing

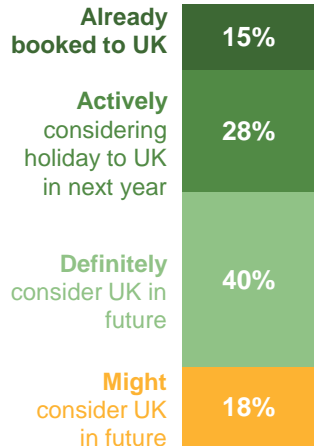


There is a huge opportunity for the UK to attract Dutch citizens. Only 1 in 7 of the Dutch market interested in a UK holiday including an outdoor activity have a trip already booked.

INTERESTED IN A HOLIDAY IN ENGLAND INC. OUTDOOR ACTIVITIES

31%

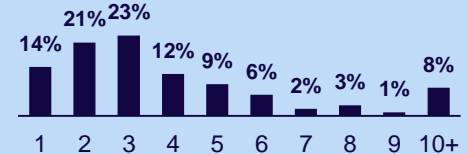
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PREVIOUS ACTIVITY PARTICIPATION ON HOLIDAY

ACTIVITY	REGULAR / OCCASIONAL	MARKET INDEX *
Gentle Country Walks (2 hrs / 5 miles)	90%	105
Hill-Walking or Full day walks	75%	110
Mountain Biking	34%	92
Kayaking	27%	93
Horse-riding	25%	81
Road Cycling	24%	73
Climbing	23%	85
Rafting	20%	95
Windsurfing	17%	100
Surfing	17%	85
Canyoning	16%	84
Coasteering	9%	75

NUMBER OF HOLIDAYS INC. OUTDOOR ACTIVITY (LAST 3 YEARS)



AVERAGE

3.89

MEDIAN

3.00

This audience averaged almost 4 holidays involving an outdoor activity in the past three years.

The Dutch market are more interested in hill walking or longer walks compared with other markets but have little interest in more extreme activities. Road cycling has less of an appeal on holiday than other markets.

*Index measures participation relative to US, France, Netherlands and UK



Camping is attractive to the Dutch market for general holidays, but much less so for the UK which may be due to low awareness of UK camping facilities

POPULAR ACTIVITY HOLIDAY DESTINATIONS

...MOST POPULAR COUNTRIES

	%	Index**
Germany	24%	160
France	16%	94
Belgium	16%	200
Austria	14%	117
Spain	13%	93

...REGIONS

	%	Index**
NET: Europe	89%	111
NET: Americas	13%	59
NET: Australasia	6%	100
NET: Asia	8%	67

BOOKING OF MAIN ACTIVITY

	%	Booking Index*
Didn't make any bookings – just did them	71%	113
Booked one or more separate single day tours once I got there	16%	80
Booked a multi-day itinerary once I got there	7%	64
Booked one or more separate single day tours before I travelled	7%	70
Booked a multi-day itinerary before I travelled	6%	75

The Dutch market are very unlikely to book the main activity prior to their trips with three in four opting to make no bookings at all, even once arriving at their destination.

Mid-range hotels is the popular option for UK trips whilst Bed & Breakfast and hotels are particularly attractive when visiting the UK.

ACCOMMODATION ON PREVIOUS ACTIVITY HOLIDAYS

	...ALL DESTINATIONS		...IN THE UK	
	%	Index*	%	Index*
Mid-range hotel (3*)	25%	89	35%	125
Rented apartment	24%	126	14%	82
Tent / Camping	19%	146	16%	107
High-end hotel (4/5*)	20%	91	13%	68
Bed and breakfast	14%	100	32%	145
Home of friends	10%	100	17%	155
Budget hotel (2*)	9%	90	11%	85
Hostel	7%	100	16%	160
Commercial renting (e.g. Airbnb)	4%	57	4%	57
Net: All paid	93%	101	92%	98

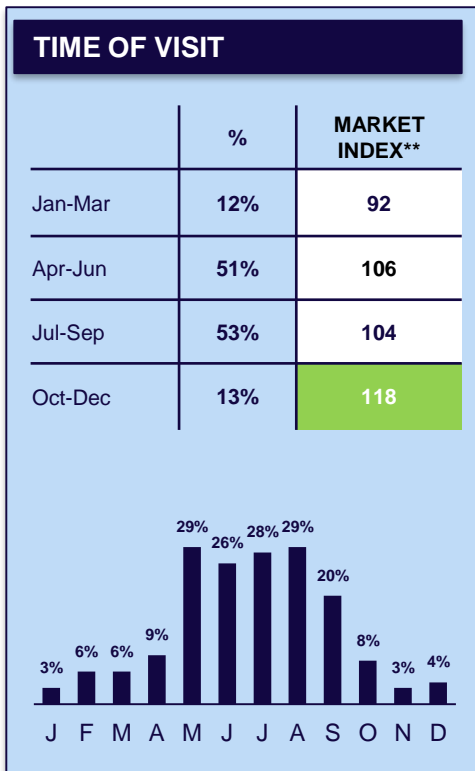
**UK was excluded from country destinations indexing

*Index measures relativity to US, France, Netherlands and UK



Almost half of the Dutch market interested indicate they would travel with their car to England

ACTIVITIES SELECTED FOR FUTURE TRIP TO ENGLAND		
ACTIVITY	SELECTED	MARKET INDEX*
Gentle Country Walks (2 hrs / 5 miles)	72%	109
Hill-Walking or Full day walks	35%	106
Mountain Biking	15%	83
Horse-riding	12%	71
Road Cycling	8%	53
Kayaking	7%	78
Climbing	6%	67
Rafting	5%	83
Surfing	4%	67
Windsurfing	4%	100
Coasteering	3%	50
Canyoning	2%	40



TRANSPORT METHOD - ARRIVAL		
	%	MARKET INDEX**
Plane	47%	80
By water, with car	46%	139
By water, without car	16%	114
Train	33%	118

Alternative offerings to plane are apparent for the Dutch market - many are interested in travelling by ferry and bringing their own car.

The summer months are by far the most appealing to the Dutch market although October – December appeals slightly more than for other markets.

*Index measures participation relative to US, France, Netherlands and UK

** UK was excluded from date of visit and transport arrival method indexing

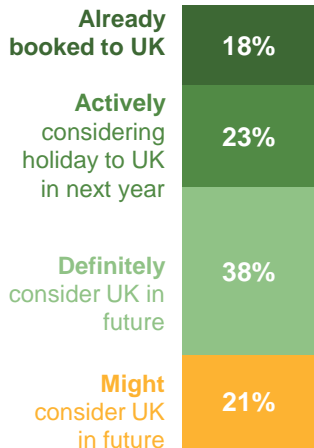


A quarter of Germans are interested in taking a holiday involving an outdoor activity to England

INTERESTED IN A HOLIDAY IN ENGLAND INC. OUTDOOR ACTIVITIES

27%

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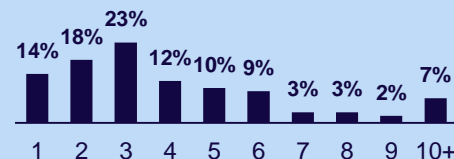


PREVIOUS ACTIVITY PARTICIPATION ON HOLIDAY

ACTIVITY	REGULAR / OCCASIONAL	MARKET INDEX *
Gentle Country Walks (2 hrs / 5 miles)	82%	95
Hill-Walking or Full day walks	60%	88
Mountain Biking	29%	78
Horse-riding	29%	94
Climbing	27%	100
Road Cycling	22%	67
Kayaking	20%	69
Surfing	19%	95
Windsurfing	14%	82
Canyoning	12%	63
Rafting	12%	57
Coasteering	7%	58

*Index measures participation relative to US, France, Netherlands and UK

NUMBER OF HOLIDAYS INC. OUTDOOR ACTIVITY (LAST 3 YEARS)



AVERAGE

3.99

MEDIAN

3.00

The 27% of the German market who consider both a holiday / short break to England and participate in outdoor activities have taken, on average, 4 holidays including an outdoor activity in the past three years.

Walking has by far the highest reach, but Mountain Biking, Horse-riding and Climbing have considerable reach also.



Germans holiday at home, or in nearby countries and are likely to use hotels or rented apartments

POPULAR ACTIVITY HOLIDAY DESTINATIONS

...MOST POPULAR COUNTRIES

	%	Index**
Austria	24%	200
Germany	20%	133
Italy	13%	118
Spain	13%	93
France	12%	71

...REGIONS

	%	Index**
NET: Europe	90%	113
NET: Americas	13%	59
NET: Asia	13%	108
NET: Australasia	7%	117

BOOKING OF MAIN ACTIVITY

	%	Booking Index*
Didn't make any bookings – just did them	64%	102
Booked one or more separate single day tours once I got there	20%	100
Booked a multi-day itinerary once I got there	12%	109
Booked one or more separate single day tours before I travelled	11%	110
Booked a multi-day itinerary before I travelled	8%	100

Most of this market do not make any bookings. The German market is slightly more likely to book separate single day tours.

99% of Germans interested in UK holidays involving outdoor activities opt to choose paid accommodation.

ACCOMMODATION ON PREVIOUS ACTIVITY HOLIDAYS

	...ALL DESTINATIONS		...IN THE UK	
	%	Index*	%	Index*
Mid-range hotel (3*)	30%	107	36%	129
High-end hotel (4/5*)	27%	123	22%	116
Rented apartment	23%	121	15%	88
Budget hotel (2*)	10%	100	14%	108
Tent / Camping	10%	77	9%	60
Bed and breakfast	10%	71	19%	86
Hostel	9%	129	9%	90
Home of friends	8%	80	7%	64
Commercial renting (e.g. Airbnb)	6%	86	5%	71
Net: All paid	95%	103	99%	105

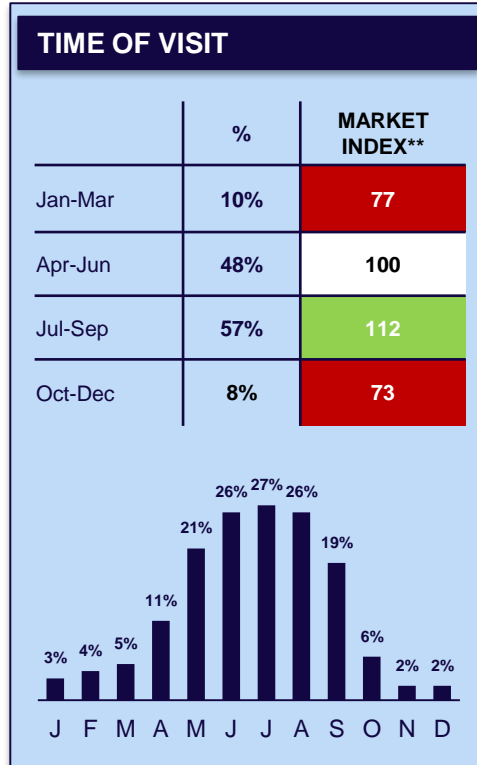
**UK was excluded from country destinations indexing

*Index measures relativity to US, France, Netherlands and UK



Gentle country walks are by far the most popular activity for a trip to England, but Climbing and Windsurfing are also relatively popular with this market, compared to others

ACTIVITIES SELECTED FOR FUTURE TRIP TO ENGLAND		
ACTIVITY	SELECTED	MARKET INDEX*
Gentle Country Walks (2 hrs / 5 miles)	68%	103
Hill-Walking or Full day walks	24%	73
Horse-riding	17%	100
Mountain Biking	17%	94
Climbing	11%	122
Road Cycling	8%	53
Surfing	6%	100
Kayaking	6%	67
Windsurfing	5%	125
Rafting	5%	83
Coasteering	3%	50
Canyoning	3%	60



TRANSPORT METHOD - ARRIVAL		
	%	MARKET INDEX**
Plane	62%	105
By water, with car	35%	106
By water, without car	13%	93
Train	16%	57

Summer is by far the most popular time for a visit to England with outdoor activities for the German market with over half choosing a trip July-September

*Index measures participation relative to US, France, Netherlands and UK

** UK was excluded from date of visit and transport arrival method indexing

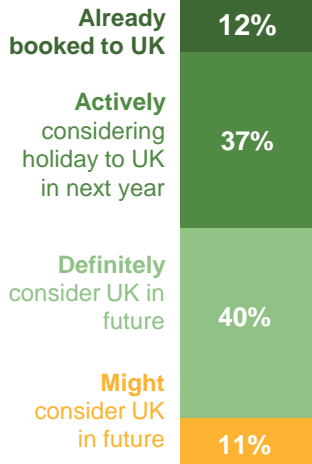


A high proportion of this market indicate high-impact activities are of more interest than they are for other markets

INTERESTED IN A HOLIDAY IN ENGLAND INC. OUTDOOR ACTIVITIES

17%

...OF THESE...

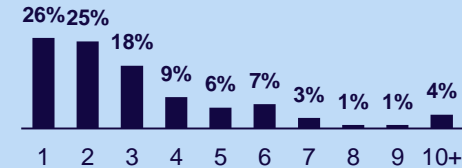


PREVIOUS ACTIVITY PARTICIPATION ON HOLIDAY

ACTIVITY	REGULAR / OCCASIONAL	MARKET INDEX *
Gentle Country Walks (2 hrs / 5 miles)	86%	100
Hill-Walking or Full day walks	71%	104
Horse-riding	53%	171
Kayaking	49%	169
Road Cycling	45%	136
Rafting	43%	205
Mountain Biking	43%	116
Climbing	37%	137
Surfing	31%	155
Canyoning	32%	168
Coasteering	26%	217
Windsurfing	24%	141

*Index measures participation relative to US, France, Netherlands and UK

NUMBER OF HOLIDAYS INC. OUTDOOR ACTIVITY (LAST 3 YEARS)



AVERAGE	3.15
MEDIAN	2.00

The US market tend to go on fewer foreign holidays involving outdoor activities than other markets.

All activities, with the exception of walking, index higher for US than for other markets in terms of previous participation. This suggests that those open to a UK outdoor holiday might be more open to a range of activities.



Unsurprisingly, those from the US are more likely to book activity elements of their trip prior to arriving at destination. The preferred accommodation for this market is mid to high-end hotels.

POPULAR ACTIVITY HOLIDAY DESTINATIONS

...MOST POPULAR COUNTRIES

	%	Index**
United States of America	18%	200
United Kingdom	18%	150
Canada	15%	214
France	14%	82
Mexico	12%	240

...REGIONS

	%	Index**
NET: Europe	53%	66
NET: Americas	49%	223
NET: Asia	13%	108
NET: Australasia	8%	133

BOOKING OF MAIN ACTIVITY

	%	Booking Index*
Didn't make any bookings – just did them	43%	68
Booked one or more separate single day tours once I got there	30%	150
Booked a multi-day itinerary once I got there	20%	182
Booked one or more separate single day tours before I travelled	18%	180
Booked a multi-day itinerary before I travelled	13%	163

Potentially due to the amount of planning required for a trip, US citizens are more likely than other markets to book trips/tours for their main activity.

Paid-for accommodation is popular – but camping and rented apartments have lower interest than other markets.

ACCOMMODATION ON PREVIOUS ACTIVITY HOLIDAYS

	...ALL DESTINATIONS		...IN THE UK	
	%	Index*	%	Index*
Mid-range hotel (3*)	41%	146	45%	161
High-end hotel (4/5*)	34%	155	38%	200
Bed and breakfast	15%	107	24%	109
Home of friends	14%	140	21%	191
Budget hotel (2*)	12%	120	19%	146
Rented apartment	11%	58	14%	82
Hostel	9%	129	19%	190
Commercial renting (e.g. Airbnb)	9%	129	10%	143
Tent / Camping	7%	54	11%	73
Net: All paid	91%	99	97%	103

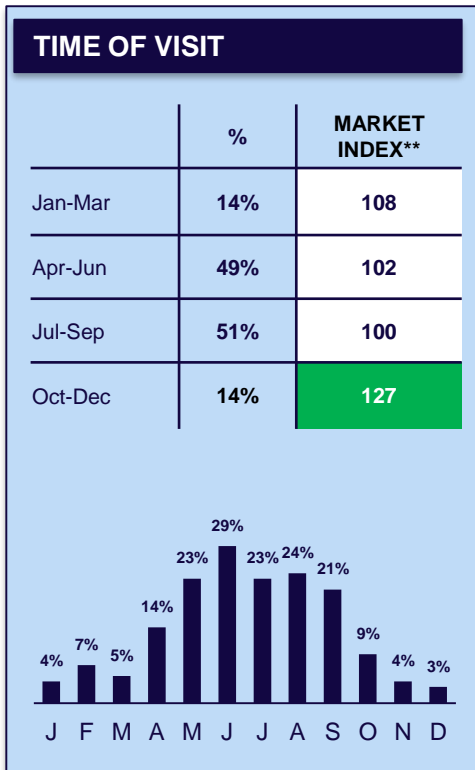
**UK was excluded from country destinations indexing

*Index measures relativity to US, France, Netherlands and UK



Many activities are of interest to the US market - horse-riding, road cycling and coasteering are all more popular than in other markets. The US market are more open to visiting during winter months

ACTIVITIES SELECTED FOR FUTURE TRIP TO ENGLAND		
ACTIVITY	SELECTED	MARKET INDEX*
Gentle Country Walks (2 hrs / 5 miles)	69%	105
Hill-Walking or Full day walks	37%	112
Horse-riding	26%	153
Road Cycling	23%	153
Mountain Biking	19%	106
Kayaking	11%	122
Climbing	10%	111
Coasteering	9%	150
Rafting	7%	117
Canyoning	6%	120
Surfing	6%	100
Windsurfing	5%	125



TRANSPORT METHOD - ARRIVAL		
	%	MARKET INDEX**
Plane	83%	141
By water, with car	16%	48
By water, without car	13%	93
Train	29%	104

Whilst flying to England is the most popular transport method, there is still interest in ferry and train options meaning it might be considered part of a wider Europe tour.

Winter months are quieter but there is slightly more interest in visiting UK during October – March.

*Index measures participation relative to US, France, Netherlands and UK

** UK was excluded from date of visit and transport arrival method indexing

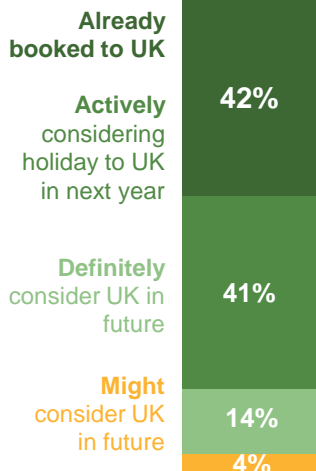


A third of the UK market are interested in taking a holiday in England involving an outdoor activity and this market have taken on average 4.5 holidays including an outdoor activity recently

INTERESTED IN A HOLIDAY IN ENGLAND INC. OUTDOOR ACTIVITIES

34%

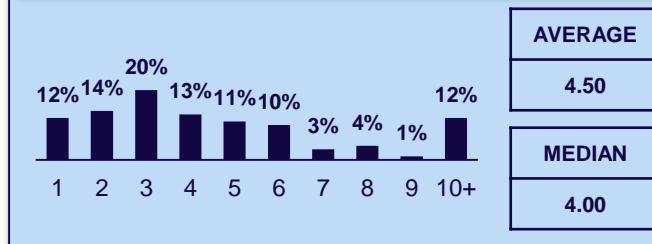
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PREVIOUS ACTIVITY PARTICIPATION ON HOLIDAY

ACTIVITY	REGULAR / OCCASIONAL	MARKET INDEX *
Gentle Country Walks (2 hrs / 5 miles)	85%	99
Hill-Walking or Full day walks	61%	90
Road Cycling	35%	106
Mountain Biking	32%	86
Climbing	25%	93
Horse-riding	24%	77
Kayaking	21%	72
Canyoning	17%	89
Surfing	16%	80
Windsurfing	13%	76
Rafting	13%	62
Coasteering	12%	100

NUMBER OF HOLIDAYS INC. OUTDOOR ACTIVITY (LAST 3 YEARS)



1 in 8 of the UK market interested in an outdoor activity holiday have taken part in 10 or more in the last three years. With an average of 4.50 in the last three years, the UK market has a considerable reach.

Walking is the most popular activity and extreme activities such as Windsurfing, Rafting and Kayaking are less popular than for other markets.

*Index measures participation relative to US, France, Netherlands and UK



Mid-range hotels, B&Bs, camping and rented apartments are all popular choices for UK outdoor activity enthusiasts – camping is more popular for this market

BOOKING OF MAIN ACTIVITY		
	%	Booking Index*
Didn't make any bookings – just did them	71%	113
Booked one or more separate single day tours once I got there	17%	85
Booked a multi-day itinerary once I got there	9%	82
Booked one or more separate single day tours before I travelled	8%	80
Booked a multi-day itinerary before I travelled	4%	50

The UK market are less likely to book a multi-day itinerary. Making no bookings at all is by far the most common approach.

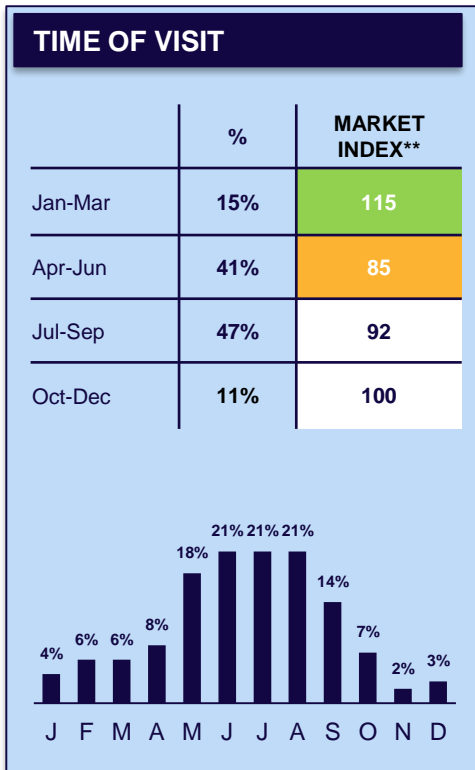
Rented apartments and camping are popular options for those from the UK. Other markets value the prospect of B&B in the UK higher than those from the UK do.

ACCOMMODATION ON PREVIOUS ACTIVITY HOLIDAYS				
	...ALL DESTINATIONS		...IN THE UK	
	%	Index*	%	Index*
Mid-range hotel (3*)	19%	68	18%	64
Bed and breakfast	18%	129	18%	82
Tent / Camping	18%	138	19%	127
Rented apartment	16%	84	20%	118
High-end hotel (4/5*)	14%	64	14%	74
Budget hotel (2*)	8%	80	9%	69
Home of friends	8%	80	7%	64
Hostel	4%	57	4%	40
Commercial renting (e.g. Airbnb)	4%	57	4%	57
Net: All paid	91%	99	93%	99



Despite low levels of previous participation, England holidays involving extreme activities offer considerable interest to the UK market with surfing, canyoning and kayaking all more popular options

ACTIVITIES SELECTED FOR FUTURE TRIP TO ENGLAND		
ACTIVITY	SELECTED	MARKET INDEX*
Gentle Country Walks (2 hrs / 5 miles)	61%	92
Hill-Walking or Full day walks	26%	79
Road Cycling	17%	113
Mountain Biking	16%	89
Horse-riding	14%	82
Kayaking	11%	122
Climbing	10%	111
Surfing	9%	150
Coasteering	8%	133
Canyoning	7%	140
Rafting	5%	83
Windsurfing	5%	125



Whilst summer months are of most interest, quarter one of January-March is more popular for the UK market than others. Peak interest is June-August.

*Index measures participation relative to US, France, Netherlands and UK

** UK was excluded from date of visit and transport arrival method indexing