Project Lion

Deriving a product-centric tourism segmentation for VisitEngland using existing data

February 2, 2016
Agenda…

BACKGROUND AND METHODOLOGY

FIVE SEGMENTS – AN OVERVIEW

PEN PORTRAITS – A SNAPSHOT

CONCLUSION

NEXT STEPS
Background & Objectives

VisitEngland wished to look at a segmentation of domestic tourists based on different needs, attitudes and behaviours to help prioritise future marketing and product development activity.

Before commissioning any new research, the organisation wished to review existing data. This exercise would enable a sense of whether this type of tourism segmentation might be (a) possible, and (b) useful to VisitEngland.

Two data sources are available and have been considered as part of this investigation:

1. The TNS Brand & Advertising Tracking Dataset, containing a total sample size of N=25,173 English tourists spanning October 2009 through to March 2015;

2. The ‘Project Jack’ Quarter 1 data-set (April 2015 – end June 2015) of N=2,500 Great Britain tourists (slightly different tourist definition).

The former of these alternative data sources was deemed most relevant, as questions around self-stated tourism drivers were included and the data-set was significantly larger. It is important to note that neither data source had been designed with the intention of developing a segmentation, so it was acknowledged there would be constraints and deficits, but that these could be built upon over time.

1Stayed in paid accommodation in past 12 months and planning to stay in paid accommodation in next 12 months and open to holidays in England.
Framework for Consideration

In order to develop and leverage a strong portfolio of ‘products’, we need to start with a hypothesis that different people want different things from their domestic holiday or short-break destinations.

To explore this hypothesis in depth, we began by looking at three different lenses:

WHAT people DO on their breaks (activities, places)

WHO the traveller is (demographics)

MOTIVATIONS and NEEDS – what they are after (ideal holidays or breaks)

COMBINING THE LENSES ‘Product-Centric’ consumer segmentation and testing these are actionable

CONFIRMING MEANINGFUL DIFFERENCES: Visitation patterns, value, propensity, places, satisfaction, advocacy

The aim of this presentation is NOT to go through the technical aspects of this process, but to briefly illustrate the first three lenses, then focus on sharing the final ‘test’ segmentation and testing its applicability to answer the ultimate question.
The WHAT lens

Based on:
• Activities undertaken on last trip (Q44)
• Type of accommodation stayed in (Q45 and Q45a as proxy for places likely to normally stay)
• Type of break (e.g. seaside, touring, etc – Q43)

Note, we did NOT use actual destination visited (Q46) in this approach, as we found that it was influenced by geographic proximity, but more independent of the above variables. Given we wanted this to be truly product-centric and not geographic-centric, and knowing it weakened the explanatory power of the solution, we left it out of the analysis as an input variable.

Produces 9 ‘segments’, which are highly discriminatory.

They discriminate most strongly on (in order):
What is important to them, type of holiday, main destination*, type of accommodation, needs/motivations (what is important to them), advocacy, experience rating.
In addition, they are discriminating on all key demographics.

*even though it wasn’t an input variable, it was still discriminating as a profiling variable!
The WHO lens

Based on:
• Gender (S2)
• Lifestage (Q65, Q67)
• Age (S3)
• Income (Q68)
• Social class (Q64)
• Region (S4)

Produces 10 ‘segments’, which are highly discriminatory.

They discriminate most strongly on (in order):
Age, Needs/motivations (what is important), social grade, employment, income, children in household, marital status, destinations visited recently.

A further list of more than 10 variables of actionable interest are also discriminating.
The WHY lens

Based on:

- Type of holiday normally preferred (Q15)
- What is important in a holiday or short break (Q51a)

Produces 8 'segments', which are highly discriminatory.

They discriminate most strongly on (in order):
- Needs/motivations (what is important), destinations visited, type of holiday, social grade, employment, income, type of accommodation, age.
- A further ten variables deemed actionable also highly discriminating.
What does all of this MEAN?

It means good news!

1. It means that demographics and psychographics (needs/motivations) and actual behaviour are all highly correlated
2. It means the ‘ideal’ combination will deliver us something actionable, meaningful and discriminating

Robust, as it explains different behaviour, likely future behaviour and value contribution

Useful to directly find and target the audience

Meaningful, as it allows us to isolate different product-based motivations/needs

So next, we combined these three lenses to identify 5 manageable and more robust segments
Agenda...

BACKGROUND AND METHODOLOGY

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PEN PORTRAITS – A SHAPSHOT

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NEXT STEPS
FIVE segments can be produced by combining the lenses

Discriminate on the key dimensions of interest (in order):

- Needs & motivations
- Type of break
- Destination visited
  - Social grade
  - Age
  - Media used
  - Employment
  - Income
  - Children
  - Accommodation type
  - Region
  - Marital status
  - Experience rating
  - Gender
  - Propensity to revisit

Deemed most relevant to the objective of determining whether a product-centric segmentation could be derived.

Essential for reaching these segments as well as for anticipating different levels of return on tourism investment (value).
Visually and statistically – we can definitely target by what is important.

What is important by segment

The details are not intended to be read on this chart at this stage.... What IS important is how discriminating needs/motivations are. We shall profile some of these shortly.
Destinations differ quite significantly

Destination of most recent visit by segment
As do the activities they take part in…..

Activities Undertaken on last holiday or short break

**COUNTRY & OUTDOORS**
- **Segment 1**
  - Explored the countryside
  - Visited a castle, stately home or other historic site
  - Visited a garden
  - Outdoor leisure pursuits (e.g. walking, cycling, golf, water sports)

- **Segment 2**
  - Went to the beach / seaside
  - Visited a theme park, pleasure beach or funfair

**URBAN EXPLORATION**
- **Segment 4**
  - Visited a museum or art gallery
  - Visited family/relatives/friends
  - Went on a guided tour
  - Explored a large town / city

- **Segment 5**
  - Others
  - Watched a sporting event
  - Attended an entertainment (e.g. cinema, concert, theatre, musical)

**SHOPPING**
- **Segment 3**
  - Others
  - Went shopping

- **Segment 5**
  - Don’t know

**ENTERTAINING ADULTS**
- **Segment 4**

**ENTERTAINING KIDS**
- **Segment 2**

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Q44.
Base All respondents – holiday in England, Segment 1 n=5512, Segment 2n=3530, Segment 3 n=1962, Segment 4 n=4323, Segment 5 n=1931
By continuing to profile we learn who they are and can assign them ‘working names’ and estimate size (people)

5. ASPIRATIONAL FAMILY FUN
Typically information-hungry, London-based high earners with children at home, they regularly take city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits.

4. FREE AND EASY MINI-BREAKERS
More likely than other segments to be ‘young, free and single’. Demographically close to ‘the average Joe’, but they really stand out in their holiday behaviour.

3. FUSS-FREE VALUE SEEKERS
Empty nesters on a budget, they seek good value beach holidays with convenient transport links. Tend to be less digitally active than other segments – less likely to engage in social media or book holiday online.

1. COUNTRY-LOVING TRADITIONALISTS
Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN
Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more ‘social’ alternatives to hotel accommodation, such as caravans or holiday camps.
Deep dive into 3 key areas

1. DEMOGRAPHICS
   - Age
   - Gender
   - Children in household
   - Income

2. BEHAVIOUR
   - Frequency of holidays taken in England
   - Typical holiday activities

3. ATTITUDES
   - Openness to holidays in England
   - Openness to holidays in other countries
**Profiling our segments: AGE**

When profiling our segments we are interested in both the **skews** and the **size** of the demographics within the profiles. A large skew that represents a little size, may not be as useful.

In the below, we chart two overlapping figures. The red line represents an INDEX of how much this segment skews on a. An index score of 100 means the proportion is in line with the average across all segments. An index score of 200 means it is twice as likely to be in that age group, and a score of 50 means it is half as likely. The absolute percentages (SIZE) are shown as blue bars.

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**Country-Loving Traditionalists**

This segment skews older, particularly over the age of 50. Over 50’s represent 56% of their profile vs. 41% for the average.

**Fun in the Sun**

This segment skews higher in the 30-50 age group (ie: the age group where mums are most likely to have kids!). The 30-50 group represents 55% of this profile vs. 40% average.

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Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.
Profiling our segments: AGE

This segment splits on age – there are a higher proportion of under 25’s and a higher proportion over 65 – likely reflecting the dominance of “budget” in their lifestages: students and retirees.

This segment doesn’t skew particularly highly on age. There is a slight skew towards the under 30’s.

This segment very much is under 50.

Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.
Profiling our segments: GENDER

Profiling our segments on gender, again we explore this by absolute percentage, and the “index” — which shows the relative skew as ratio to the average (which is a score of 100). From the below, we see the greatest gender skew for Aspirational Family Fun, they are much more likely to be male. Segments 2 and 3 show a slight skew towards females.
Profiling our segments: CHILDREN IN HOUSEHOLD

Profiling our segments on whether they have children or not, again we explore this by absolute percentage, and the “index” – which shows the relative skew as ratio to the average (which is a score of 100). Segments 2 and 5 are much more likely to have children.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Have children</th>
<th>Don't have children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country-Loving Traditionalists</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>Fun in the Sun</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Fuss-Free Value Seekers</td>
<td>27%</td>
<td>73%</td>
</tr>
<tr>
<td>Free &amp; Easy Mini-Breakers</td>
<td>17%</td>
<td>83%</td>
</tr>
<tr>
<td>Aspirational Family Fun</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>31%</td>
<td>69%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Index</th>
<th>Don't have children</th>
<th>Have children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country-Loving Traditionalists</td>
<td>61</td>
<td>118</td>
</tr>
<tr>
<td>Fun in the Sun</td>
<td>70</td>
<td>164</td>
</tr>
<tr>
<td>Fuss-Free Value Seekers</td>
<td>87</td>
<td>106</td>
</tr>
<tr>
<td>Free &amp; Easy Mini-Breakers</td>
<td>55</td>
<td>121</td>
</tr>
<tr>
<td>Aspirational Family Fun</td>
<td>55</td>
<td>197</td>
</tr>
</tbody>
</table>

Profiling our segments: INCOME

Income distribution is a defining characteristic for two of the segments: Fuss-Free Value Seekers and Aspirational Family Fun. For the other segments, only minor deviations exist as shown below.

For Fuss-Free Value Seekers, their skew towards the lower incomes implies that these guys have means to holidays, and so it follows they would be taking short breaks closer to home. For Aspirational Family Fun, the implication of their skew towards higher incomes is that they are much more likely to have the means to take longer more expensive holidays abroad.

A minor skew towards the middle income brackets (and away from the high end).
No particular skew in income from the average.

Clear income skew towards the higher income brackets – particularly in the over £45K bracket.

A very, very clear skew towards the lower household income brackets, particularly in the under £15K bracket.
### Profiling our segments: HOLIDAY BEHAVIOUR

Within our segments are distributions of the three different holiday types to England within the last 12 months (short, mid and longer holidays). For all, short breaks are the most common type. But the profiling reveals skews in the types of holidays they are more likely to take and how many. Aspirational Family Fun and Country-Loving Traditionalists take more holidays than the other segments, and are more likely to do so for longer.

<table>
<thead>
<tr>
<th>Percentage taking holiday in England in L12M</th>
<th>Number of each holiday type to England (share of holiday type in italics)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Short breaks</td>
</tr>
<tr>
<td>Country-Loving Traditionalists</td>
<td>1.4</td>
</tr>
<tr>
<td></td>
<td>59%</td>
</tr>
<tr>
<td>Fun in the Sun</td>
<td>1.1</td>
</tr>
<tr>
<td></td>
<td>56%</td>
</tr>
<tr>
<td>Fuss-Free Value Seekers</td>
<td>1.2</td>
</tr>
<tr>
<td></td>
<td>52%</td>
</tr>
<tr>
<td>Free &amp; Easy Mini-Breakers</td>
<td>1.4</td>
</tr>
<tr>
<td></td>
<td>66%</td>
</tr>
<tr>
<td>Aspirational Family Fun</td>
<td>1.4</td>
</tr>
<tr>
<td></td>
<td>53%</td>
</tr>
</tbody>
</table>

Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.
## Profiling our segments: ACTIVITIES UNDERTAKEN ON THEIR LAST SHORT BREAK

In the below we see strong associations for several segments – for instance, Fun in the Sun is highly likely to engage in beach/seaside activities. Although small in absolute terms, Aspirational Family Fun is more likely than other groups to engage to sport events and guided tours.

### % participating in each activity

<table>
<thead>
<tr>
<th>Activity</th>
<th>Country-Loving Traditionalists</th>
<th>Fun in the Sun</th>
<th>Fuss-Free Value Seekers</th>
<th>Free &amp; Easy Mini-Breakers</th>
<th>Aspirational Family Fun</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Went shopping</td>
<td>47%</td>
<td>59%</td>
<td>49%</td>
<td>57%</td>
<td>43%</td>
<td>52%</td>
</tr>
<tr>
<td>Explored a small town</td>
<td>57%</td>
<td>50%</td>
<td>34%</td>
<td>15%</td>
<td>29%</td>
<td>39%</td>
</tr>
<tr>
<td>Explored the countryside</td>
<td>65%</td>
<td>31%</td>
<td>23%</td>
<td>6%</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Went to the beach / seaside</td>
<td>21%</td>
<td>83%</td>
<td>44%</td>
<td>9%</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Explored a large town / city</td>
<td>27%</td>
<td>24%</td>
<td>24%</td>
<td>55%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Outdoor leisure pursuits (e.g. walking, cycling, golf, water sports)</td>
<td>38%</td>
<td>32%</td>
<td>19%</td>
<td>8%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Visited a castle, stately home or other historic site</td>
<td>38%</td>
<td>19%</td>
<td>15%</td>
<td>19%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Visited a museum or art gallery</td>
<td>22%</td>
<td>11%</td>
<td>12%</td>
<td>31%</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Visited a garden</td>
<td>28%</td>
<td>14%</td>
<td>15%</td>
<td>9%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Attended an entertainment (e.g. cinema, concert, theatre, musical)</td>
<td>9%</td>
<td>15%</td>
<td>16%</td>
<td>29%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Went to a zoo, aquarium or sea life centre</td>
<td>7%</td>
<td>23%</td>
<td>14%</td>
<td>7%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Visited a theme park, pleasure beach or funfair</td>
<td>4%</td>
<td>25%</td>
<td>15%</td>
<td>6%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Went on a guided tour (e.g. bus tour or guided walking tour)</td>
<td>7%</td>
<td>3%</td>
<td>7%</td>
<td>9%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Watched a sporting event</td>
<td>3%</td>
<td>3%</td>
<td>6%</td>
<td>7%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Visited family/relatives/friends</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### INDEX for each Segment

<table>
<thead>
<tr>
<th>Activity</th>
<th>Country-Loving Traditionalists</th>
<th>Fun in the Sun</th>
<th>Fuss-Free Value Seekers</th>
<th>Free &amp; Easy Mini-Breakers</th>
<th>Aspirational Family Fun</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Went shopping</td>
<td>90</td>
<td>115</td>
<td>95</td>
<td>110</td>
<td>83</td>
<td></td>
</tr>
<tr>
<td>Explored a small town</td>
<td>144</td>
<td>128</td>
<td>85</td>
<td>39</td>
<td>74</td>
<td></td>
</tr>
<tr>
<td>Explored the countryside</td>
<td>188</td>
<td>90</td>
<td>67</td>
<td>18</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td>Went to the beach / seaside</td>
<td>61</td>
<td>242</td>
<td>129</td>
<td>28</td>
<td>84</td>
<td></td>
</tr>
<tr>
<td>Explored a large town / city</td>
<td>79</td>
<td>69</td>
<td>71</td>
<td>161</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Outdoor leisure pursuits (e.g. walking, cycling, golf, water sports)</td>
<td>145</td>
<td>124</td>
<td>74</td>
<td>33</td>
<td>104</td>
<td></td>
</tr>
<tr>
<td>Visited a castle, stately home or other historic site</td>
<td>150</td>
<td>75</td>
<td>61</td>
<td>74</td>
<td>101</td>
<td></td>
</tr>
<tr>
<td>Visited a museum or art gallery</td>
<td>106</td>
<td>54</td>
<td>57</td>
<td>144</td>
<td>113</td>
<td></td>
</tr>
<tr>
<td>Visited a garden</td>
<td>155</td>
<td>77</td>
<td>82</td>
<td>49</td>
<td>117</td>
<td></td>
</tr>
<tr>
<td>Attended an entertainment (e.g. cinema, concert, theatre, musical)</td>
<td>51</td>
<td>88</td>
<td>90</td>
<td>163</td>
<td>134</td>
<td></td>
</tr>
<tr>
<td>Went to a zoo, aquarium or sea life centre</td>
<td>54</td>
<td>181</td>
<td>111</td>
<td>59</td>
<td>162</td>
<td></td>
</tr>
<tr>
<td>Visited a theme park, pleasure beach or funfair</td>
<td>30</td>
<td>210</td>
<td>123</td>
<td>51</td>
<td>187</td>
<td></td>
</tr>
<tr>
<td>Went on a guided tour (e.g. bus tour or guided walking tour)</td>
<td>88</td>
<td>42</td>
<td>96</td>
<td>126</td>
<td>187</td>
<td></td>
</tr>
<tr>
<td>Watched a sporting event</td>
<td>60</td>
<td>56</td>
<td>105</td>
<td>125</td>
<td>233</td>
<td></td>
</tr>
<tr>
<td>Visited family/relatives/friends</td>
<td>93</td>
<td>42</td>
<td>150</td>
<td>149</td>
<td>64</td>
<td></td>
</tr>
</tbody>
</table>

The Greener the cell, the higher the score compared to the total.

Blue indicates higher index in the matrix, Red indicates lower index in the matrix

Blue text indicates higher average comparing column-wise, Red text indicates lower average, comparing column-wise
Profiling our segments: RELATIONSHIP TO ENGLAND

Again we profile by the absolute percentages and the index. Both of these measure show clearly that a strong relationship exists between Fuss-Free Value Seekers and England – for a large portion (34%) it is the only place they would consider, and they are at least twice as likely as other segments to do so (index: 225).

- I wouldn’t normally consider it for a holiday or short break but I wouldn’t totally reject it
- Not one of my usual holiday or short break destinations but I might consider it
- One of a number of destinations I am happy to visit for a holiday or short break
- My favourite destination for a holiday or short break but I will also consider others
- The only destination I would consider for a holiday or short break

<table>
<thead>
<tr>
<th>Country-Loving Traditionalists</th>
<th>Fun In The Sun</th>
<th>Fuss-Free Value Seekers</th>
<th>Free &amp; Easy Mini-Breakers</th>
<th>Aspirational Family Fun</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>27%</td>
<td>34%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>15%</td>
<td>27%</td>
<td>34%</td>
<td>19%</td>
<td>13%</td>
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<tr>
<td>25%</td>
<td>27%</td>
<td>29%</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>53%</td>
<td>51%</td>
<td>29%</td>
<td>56%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Profiling our segments: ATTITUDES TOWARDS COUNTRIES AS SHORT BREAK DESTINATIONS

Segments 1 and 2 show a strong affinity towards England as a place for a short break or holiday, while Free & Easy Mini-Breakers and particularly Aspirational Family Fun show the greatest openness to international short holidays/breaks, whereas Fuss-Free Value Seekers is most closed to international short breaks/holidays, presumably via affordability.

**MEAN SCORES: 0-10 scale – ratings of countries as short break destinations:**

“10=perfect country in every way for a short break and 0 = terrible”

<table>
<thead>
<tr>
<th></th>
<th>Country-Loving Traditionalists</th>
<th>Fun in the Sun</th>
<th>Fuss-Free Value Seekers</th>
<th>Free &amp; Easy Mini-Breakers</th>
<th>Aspirational Family Fun</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>8.5</td>
<td>8.5</td>
<td>8.3</td>
<td>8.1</td>
<td>8.0</td>
</tr>
<tr>
<td>Wales</td>
<td>7.5</td>
<td>7.4</td>
<td>6.8</td>
<td>7.0</td>
<td>7.2</td>
</tr>
<tr>
<td>Scotland</td>
<td>7.4</td>
<td>7.1</td>
<td>6.7</td>
<td>7.1</td>
<td>7.2</td>
</tr>
<tr>
<td>France</td>
<td>6.3</td>
<td>6.4</td>
<td>5.6</td>
<td>6.7</td>
<td>7.0</td>
</tr>
<tr>
<td>Spain</td>
<td>5.9</td>
<td>6.2</td>
<td>5.7</td>
<td>6.5</td>
<td>6.9</td>
</tr>
<tr>
<td>Ireland</td>
<td>6.6</td>
<td>6.7</td>
<td>6.1</td>
<td>6.8</td>
<td>7.1</td>
</tr>
</tbody>
</table>

Green indicates higher score in the matrix, Yellow is medium, and Red indicates lower score in the matrix.

<table>
<thead>
<tr>
<th></th>
<th>Country-Loving Traditionalists</th>
<th>Fun in the Sun</th>
<th>Fuss-Free Value Seekers</th>
<th>Free &amp; Easy Mini-Breakers</th>
<th>Aspirational Family Fun</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>103</td>
<td>102</td>
<td>100</td>
<td>97</td>
<td>96</td>
</tr>
<tr>
<td>Wales</td>
<td>104</td>
<td>102</td>
<td>94</td>
<td>97</td>
<td>99</td>
</tr>
<tr>
<td>Scotland</td>
<td>103</td>
<td>99</td>
<td>94</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>France</td>
<td>99</td>
<td>99</td>
<td>87</td>
<td>104</td>
<td>109</td>
</tr>
<tr>
<td>Spain</td>
<td>95</td>
<td>101</td>
<td>91</td>
<td>105</td>
<td>112</td>
</tr>
<tr>
<td>Ireland</td>
<td>99</td>
<td>100</td>
<td>92</td>
<td>102</td>
<td>106</td>
</tr>
</tbody>
</table>

Blue indicates higher index in the matrix, Red indicates lower index in the matrix.

Blue text indicates higher average comparing column-wise, Red text indicates lower average, comparing column-wise.

Q1b.
Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.
Agenda...

BACKGROUND AND METHODOLOGY

FIVE SEGMENTS – AN OVERVIEW

PEN PORTRAITS – A SNAPSHOT

CONCLUSION

NEXT STEPS
#1 Country-loving traditionalists

Typically empty nesters with traditional values, country-loving traditionalists have a moderate household income, but fewer family members to cater for when on holiday. This means that their budget stretches further, and good quality, secure accommodation is a priority when booking a holiday. They are likely to have recently taken a countryside break and keep up to date with UK tourism through websites such as English Heritage and the National Trust.

**INCOME**
- AVERAGE
  - No skews to average income – 51% in the £20K-£45K HH income bracket

**LIFESTAGE**
- Married/living with partner (73%) with no children (81%). Nearly half are aged 55+

**LIVE**
- More likely to live in East/Anglia and South East (29%, Index*: 108)
- Higher than average consumption of broadsheets (27%) and UK tourism websites (15%)

**MEDIA**
- ENGLAND TOURISM: Visited England in the last 12 months
  - 78%
  - 2.3 holidays a year (typical share of holiday type)

**ON THEIR MOST RECENT TRIP...**
- Typically a countryside break (64%) for two (58%)
- Booked directly through the accommodation provider, not an intermediary (54%)
- 59% didn’t stay in a hotel, being more likely than other segments to prefer the ‘personal touch’ of a b&b or rented accommodation
- Spent time exploring the countryside (65%) and/or small towns (57%)

**TOP PRIORITIES IN CHOOSING A HOLIDAY**

<table>
<thead>
<tr>
<th>IMPORTANCE</th>
<th>% T2B</th>
<th>Index*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unspoilt countryside</td>
<td>79%</td>
<td>105</td>
</tr>
<tr>
<td>Clean and tidy environment</td>
<td>77%</td>
<td>104</td>
</tr>
<tr>
<td>Opportunities to eat/drink local food/produce</td>
<td>63%</td>
<td>104</td>
</tr>
</tbody>
</table>

**ATTITUDE TOWARDS A HOLIDAY IN ENGLAND**

<table>
<thead>
<tr>
<th>Index* of mean score**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offers a wealth of cultural experiences</td>
</tr>
<tr>
<td>Makes you feel connected to the country’s history and heritage</td>
</tr>
<tr>
<td>Has beautiful countryside</td>
</tr>
<tr>
<td>Is an ideal place for people like me</td>
</tr>
</tbody>
</table>

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic
#2 Fun in the sun

Typically families looking for sunshine or summer holidays where beaches play a starring role. The number of holiday-makers to be catered for on a moderate household income means that they are likely to take fewer breaks than other segments (2 per year) and seek cheaper, more ‘social’ alternatives to hotel accommodation, such as caravans or holiday camps.

## ENGLAND TOURISM

- **72%** Visited England in the last 12 months
- **2.0 holidays per year** (typical share of holiday type)

## ON THEIR MOST RECENT TRIP...

- Typically a seaside break (86%) for at least 3 people (59%)
- 41% travelled in the summer; more ‘seasonal holidaymakers’ than other segments
- 47% are aged 35-55 years

## TOP PRIORITIES IN CHOOSING A HOLIDAY

<table>
<thead>
<tr>
<th>% T2B importance</th>
<th>Index*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good range of outdoor activities</td>
<td>46%</td>
</tr>
</tbody>
</table>

## ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

<table>
<thead>
<tr>
<th>Index* of mean score**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is good for families with kids</td>
</tr>
<tr>
<td>Has good beaches</td>
</tr>
<tr>
<td>Makes me want to return again and again</td>
</tr>
<tr>
<td>Has a sense of excitement and adventure</td>
</tr>
<tr>
<td>Is fun</td>
</tr>
<tr>
<td>Is good for people younger than me</td>
</tr>
<tr>
<td>Makes me feel like I've had a proper holiday</td>
</tr>
</tbody>
</table>

*Index is a measure of skew the % divided by the average, with 100 being the average. ➕ shows higher than average statistic.
#3 Fuss-free value seekers

Typically empty nesters on a budget, they seek good value beach holidays with convenient transport links. Although they tend to book hotel accommodation, cheaper alternatives are also considered. Fuss-free value seekers are less digitally active than other segments, being less likely to engage in social media or book their holiday online. They are, however, avid consumers of the mainstream tabloid press.

**INCOME**
- LOWER
  - Skew towards much lower household incomes. 65% with HH income <£20K

**LIFESTAGE**
- More likely than other segments to be single (36%); and not live with children (73%). Nearly half are aged 55+

**LIVE**
- More likely to be in East Midlands (10% of total, Index*: 122)

**MEDIA**
- Most likely to read the tabloids (52%) and least likely to engage in social media (60%)

---

**ENGLAND TOURISM**
- 76%
  - Visited England in the last 12 months
- 2.2 holidays per year
- 34%
  - Would only consider England for a holiday or short break

**ON THEIR MOST RECENT TRIP...**
- Typically a seaside break (53%) for two (50%)
- 41% stayed in a hotel. More likely than other segments to choose a caravan (14%) or holiday camp (12%)
- 53%
  - Booked their holiday online, but they are the segment least likely to do so
- Spent time shopping (49%), at the beach (44%), and/or exploring a small town (34%)

---

**TOP PRIORITIES IN CHOOSING A HOLIDAY**

<table>
<thead>
<tr>
<th>% T2B importance</th>
<th>Index*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to get around by public transport</td>
<td>50%</td>
</tr>
<tr>
<td>A destination that is easy to get to by public transport</td>
<td>45%</td>
</tr>
<tr>
<td>A destination that doesn't take too long to get to</td>
<td>61%</td>
</tr>
<tr>
<td>Overall availability of deals and discounts for the destination</td>
<td>62%</td>
</tr>
</tbody>
</table>

**ATTITUDE TOWARDS A HOLIDAY IN ENGLAND**

<table>
<thead>
<tr>
<th>Index* of mean score**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is good value</td>
</tr>
<tr>
<td>Makes me feel like I've had a proper holiday</td>
</tr>
<tr>
<td>Has good beaches</td>
</tr>
</tbody>
</table>

*Index is a measure of skew the % divided by the average, with 100 being the average. 
↑ shows higher than average statistic
#4 Free and easy mini-breakers

Typically more likely than other segments to be young, free and single, free and easy mini-breakers have an average household income; however they are able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. This segment is demographically close to ‘the average Joe’ (with few skews), but it is in their holiday behaviour that they really stand out from other segments.

### INCOME

**AVERAGE**

43% in the £20K-£45K HH income bracket; some high earners (1 in 4 earning £45k+)

### LIFESTAGE

Segment most likely to be single (38%), no kids (83%) and aged under 55 (70%)

### LIVE

More likely to live in the North (East or West) – 21%, (Index* 113)

### MEDIA

Higher than average consumption of broadsheets (24%) and strong users of social media (66%)

---

#### ENGLAND TOURISM

- **70%**
  - Visited England in L12M
  - 2.1 holidays a year.
  - Skew towards taking a short break (66% share of holidays)

#### ON THEIR MOST RECENT TRIP...

- **71%**
  - Most likely to be a city break (73%) for two (59%) over 1-3 nights (87%)
  - 71% stayed in a hotel, with B&Bs the only alternative considered (19%)
  - Chose to book their accommodation online; along with segment #5, the segment most likely to do so
  - More likely than others to shop (57%), explore the city (55%), visit a museum or gallery (31%) and/or indulge in cultural entertainment (29%)

#### TOP PRIORITIES IN CHOOSING A HOLIDAY

<table>
<thead>
<tr>
<th>% T2B importance</th>
<th>Index*</th>
</tr>
</thead>
<tbody>
<tr>
<td>A destination that is easy to get to by public transport</td>
<td>46%</td>
</tr>
<tr>
<td>Easy to get around by public transport</td>
<td>50%</td>
</tr>
<tr>
<td>Availability of festivals, music, sporting and cultural events</td>
<td>39%</td>
</tr>
</tbody>
</table>

#### ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

<table>
<thead>
<tr>
<th>Mean score**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has beautiful countryside</td>
</tr>
<tr>
<td>Has interesting towns and cities</td>
</tr>
<tr>
<td>Is easy to get to</td>
</tr>
</tbody>
</table>

---

*Index is a measure of skew the % divided by the average, with 100 being the average.

**Mean score based on +2 strongly agree through -2 strongly disagree

↑ shows higher than average statistic
Typically London-based high earners with children at home, this segment regularly takes city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits. They are information hungry: avidly consuming mainstream media (especially newspapers), active on social media, and actively browsing holiday booking websites to evaluate and book their holiday accommodation.

**INCOME**

**HIGHER**
Skew much higher incomes. - 67% with HH income £35K+ (45% over £45K)

**LIFESTAGE**
Tend to be male (57%) and aged under 50 (92%). Segment most likely to have children (62%)

**LIVE**
Much more likely to live in LONDON (26%, index*: 174)

**MEDIA**
Highest consumption of broadsheets (31%) and free newspapers (18%). Visit UK tourism websites (15%)

---

**ENGLAND TOURISM**

Visited England in L12M

↑ 2.7 holidays a year

More likely to take a longer holiday than other segments (↑ 18% share of holiday type)

**ON THEIR MOST RECENT TRIP...**

Typically a city break (45%) for at least 3 people (55%)

54% stayed in a hotel, with 1 in 5 opting for a b&b instead

**TOP PRIORITIES IN CHOOSING A HOLIDAY**

<table>
<thead>
<tr>
<th>Priority</th>
<th>% T2B importance</th>
<th>Index*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good nightlife</td>
<td>49%</td>
<td>148↑</td>
</tr>
<tr>
<td>Availability of festivals, music, sporting and cultural events</td>
<td>51%</td>
<td>144↑</td>
</tr>
<tr>
<td>Good range of water-based/beach activities</td>
<td>50%</td>
<td>131↑</td>
</tr>
</tbody>
</table>

**ATTITUDE TOWARDS A HOLIDAY IN ENGLAND**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Index* of mean score**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offers great entertainment / nightlife</td>
<td>116↑</td>
</tr>
<tr>
<td>Makes me feel like I'm doing less harm to the environment</td>
<td>121↑</td>
</tr>
</tbody>
</table>

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic