Discover England: summary insights on overseas visitors to England's regions

Understanding participation in activities

November 2016

Report contents

Introduction

Background

The three-year £40million Discover England Fund was announced by the Government in 2015, with the objective of ensuring that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time. The fund will be awarded to external bidders, with awards for two blocks of projects.

It is vital that funding is awarded to bids which are in line with consumer and business trends, and to this end, the fund will also support additional research, to ensure that project teams and potential bidders have access to relevant market intelligence. The research will include the delivery of both broad insights (that is, with potential relevance to any project) and research into specific areas.

In considering the types of research relevant for the Discover England Fund, it became evident that much of the information that bidders might require is actually already in existence. This includes information on the VisitBritain Insights pages, the dataset from the International Passenger Survey, other research carried out in the past by VisitBritain, or other secondary data sources.

For these reasons, VisitEngland have commissioned BDRC Continental undertake a substantial programme of tailored secondary research to ensure that bidders can easily access and use existing market intelligence to shape both year 1 and years 2-3 projects. The focus of this programme is the international consumer – while the fund is also intended to stimulate domestic tourism, bids must in the first instance demonstrate their potential to generate growth from inbound markets – and therefore all analysis should be focused on inbound markets.

This report focuses upon understanding activities – which activities motivate visitors, the activities that visitors to England participate in and how well we are perceived to deliver these activities.

About this report

The data in this report is largely drawn from:

- The International Passenger Survey (IPS), which includes a combination of raw data – some publically available and some generated via in-depth secondary analysis
- The Anholt GfK Nations Brand Index
- A specific project commissioned by VisitBritain into motivations for travel and activities undertaken in key markets
- BDRC Continental's Global Tourism Monitor.

Research sources are cited throughout.

This report aims to draw on the most up-to-date research available. In some cases, data was several years old. For example, 'activities' data is primarily based upon supplementary questions added to IPS between 2010 and 2014. With this in mind, some caution should be applied to results in these areas, although there is little evidence to suggest significant changes in recent years.

Although the report aims to focus on visitors to England, this is not always possible with the data available. Therefore the report interchanges between 'England' and 'the UK' or 'GB' where necessary. Figures reported primarily refer to holiday visits. Where this is not the case, this is clearly flagged within the report charts and commentary.

The report refers to 'target markets' throughout. These are France, Germany, USA, Spain, Italy, Netherlands, Australia, The Nordics (Sweden, Norway, Denmark, Finland and Iceland) and China. Markets have been chosen due to their current high volume of visits to England, or (as is the case with China) their potential to visit England in the future.

Executive summary

Executive summary/1

What are the needs of the market?

N.B. Results based on generic holiday needs of 23 overseas markets, not specific to holidays in England

- Enjoying the beauty of the landscape is the most frequently mentioned holiday need among international travellers, a dimension not currently seen as a strength for England, although this is improving
- Seeing world famous attractions is also a highly frequently mentioned need, on which England is perceived much more positively
- Other important product-related needs of international travellers include ‘experiencing things that are new’ and ‘enjoying local specialities’.
- Younger international travellers and those with children are more likely to have a broader range of needs, suggesting they are a more ambitious audience in terms of the activities they wish to undertake.
- Older travellers, aged 50 years or over, are more likely to be motivated by enjoying the beauty of the landscape, seeing world famous sites and visiting places with a lot of history/historic sites. Younger travellers, aged under 35 years, are more likely to be motivated by ‘experiences’, whether passive or active
- Whilst beach holidays are the most likely holidays to be taken by international travellers, it is city-based holidays which are overwhelmingly considered favourite types of holiday – 40% feel that city-based holidays are their favourite compared with 25% mentioning a beach (6% favoured a coastal area holiday)
- Multi-destination holidays are common, with 70% of international travellers having taken a touring holiday in the past 3-5 years and 68% having taken a city break which included two or more cities
- Activity-themed holidays are also popular. Within the past 3-5 years:
  - 56% have been on a holiday where the focus is mainly shopping
  - 55% have been on a walking / hiking themed holiday
  - 40% have been on a wellness/spa holiday
  - 38% have been on a holiday mainly for ‘self development’ – so learning a new skill
  - 36% have been on a holiday mainly to watch or play sport

Executive summary/2

What are the needs of the market? (contd.)

N.B. Results based on generic holiday needs of 23 overseas markets, not specific to holidays in England

- The most popular activities taken part in by international travellers on any type of holiday taken in the past 3-5 years:
  - 83% visited an historic monument on any type of holiday in the past 3-5 years
  - 83% walked / hiked in the countryside / coast
  - 82% visited a park
  - 81% shopped for clothes
  - 81% tried new food for the first time
  - 80% shopped for locally made products
- Again, younger travellers and those with children are more likely to have taken part in a range of activities across their breadth of recent holidays, whereas with their narrower holiday portfolio, older visitors take part in fewer

What activities does England deliver?

- Shopping is the most popular single activity undertaken by visitors to England, with 79% taking part
- In line with motivations and perceptions, the activities conducted centre upon England's sightseeing offer – 52% visited castles / historic houses on their visit, 49% museums / galleries and 40% religious buildings
- Among those staying outside London, although shopping was still the most popular activity, outdoor activities such as visiting the countryside/villages (42%), coast or beaches (34%) and taking a walk, hike or ramble (33%) became much more prevalent - competing with heritage / culture sightseeing.
- Those with longer stays – so from longer haul markets and older visitors – self evidently tend to take part in a broader range of activities during their visit, but especially the outdoor activities such as countryside and coast visiting

Executive summary/3

How well do we deliver these activities?

Effectiveness at delivering activities measured by examination of perception of England / UK as a provider of these activities or level of interest in undertaking these activities in England / UK

- The GfK Anholt Nations Brand Index positions the UK highly on the dimensions of contemporary culture, vibrant city life and for being rich in historic buildings and monuments
- The UK is less well regarded for being rich in natural beauty, although this measure is improving
- In line with this, potential motivations for visiting England are more likely to focus upon seeing the main tourist sights, experiencing local culture and shopping than they are for other global destinations
- Experiencing scenery / natural beauty, tasting local cuisine, resting mind / body and visiting beaches / coastal areas are much less likely to be motivations for visiting England than other global destinations
- Reflecting participation in England itself, older visitors (aged 50 or over) from source markets are more likely to be interested in visiting the countryside in GB. They are also more likely to want to explore off the beaten tracking do so without a planned itinerary
- Younger potential visitors are more interested in the big cities of GB

What are the needs of the market?

Data taken predominantly from VisitBritain's bespoke research project to understand travel motivations and activities among overseas travellers within 23 key overseas markets

N.B. This project sought to understand the overseas travel needs of the market generally, not specifically the needs of those visiting England

What does the global market need from a holiday?

Source: Global Segmentation (Arkenford)

% selecting 6/7 where 0 means wouldn't want at all and 7 means would definitely want					
1.	Enjoy the beauty of the landscape	79%	18.	Get some sun	62%
2.	Have fun and laughter	78%	19.	Feel special or spoilt	56%
3.	See world famous sites and places	74%	20.	Good shopping	55%
4.	Experience things that are new to me	71%	21.	Revisit places of nostalgic importance to me	55%
5.	Soak up the atmosphere	71%	22.	Get off the beaten track	52%
6.	Enjoy local specialities (food and drink)	71%	23.	Do something environmentally sustainable / green	48%
7.	Explore the place	70%	24.	Visit places important to my family's history	48%
8.	Enjoy peace and quiet	70%	25.	Meet the locals	48%
9.	Broaden my mind / stimulate my thinking	69%	26.	Meet and have fun with other tourists	46%
10.	Be physically healthier	69%	27.	Experience adrenalin filled adventures	43%
11.	Experience activities / places with a wow factor	69%	28.	Go somewhere that provided lots of laid on entertainment	42%
12.	Chill / slow down to a different pace of life	69%	29.	Do something the children would really enjoy	41%
13.	Feel connected to nature	68%	30.	Party	40%
14.	Visit a place with a lot of history / historic sites	67%	31.	To participate in an active pastime or sport	38%
15.	Have dedicated time with my other half	67%	32.	Watch a sporting event	37%
16.	Do what I want when I want spontaneously	67%	33.	Do something useful like volunteering to help on a project	36%
17.	Enjoy high quality food and drink (gourmet)	65%			

Among the 23 markets covered within the survey, 'enjoying the beauty of the landscape' stands out as the most frequently mentioned holiday need. Insight from the GfK Anholt Nations Brand Index indicates that this dimension is not currently perceived as a strength for GB, although it is improving.

Conversely, 'seeing world famous sites and places' is strongly associated with GB and is the third most frequently mentioned holiday need among international travellers.

Other important product-related needs of international travellers include 'experiencing things that are new' and 'enjoying local specialities'.

Variation by holiday needs by market? / 1

Source: Global Segmentation (Arkenford)

% selecting 6/7 where 0 means wouldn't want at all and 7 means would definitely want			Importance rank within key markets							
			Germany	France	Spain	Italy	NL	USA	Australia	China
1.	Enjoy the beauty of the landscape	79%	1	1	1	1	8	2	3	2
2.	Have fun and laughter	78%	2	6	2	4	1	1	1	1
3.	See world famous sites and places	74%	14	9	6	11	12	5	5	7
4.	Experience things that are new to me	71%	10	10	14	9	13	**4**	6	8
5.	Soak up the atmosphere	71%	4	8	16	13	11	7	7	4
6.	Enjoy local specialities (food and drink)	71%	5	**3**	4	7	6	6	4	14
7.	Explore the place	70%	3	2	3	2	10	3	2	18
8.	Enjoy peace and quiet	70%	7	11	9	5	**2**	12	13	10
9.	Broaden my mind / stimulate my thinking	69%	8	15	8	6	15	10	8	15
10.	Be physically healthier	69%	13	12	10	17	14	17	16	**5**
11.	Experience activities / places with a wow factor	69%	18	7	7	10	16	9	12	9
12.	Chill / slow down to a different pace of life	69%	15	13	18	8	7	15	15	**6**
13.	Feel connected to nature	68%	12	18	12	12	18	18	20	**3**
14.	Visit a place with a lot of history / historic sites	67%	16	14	11	14	17	11	**9**	11
15.	Have dedicated time with my other half	67%	11	16	**5**	15	**5**	8	10	17
16.	Do what I want when I want spontaneously	67%	**6**	**5**	13	**3**	**4**	14	14	16
17.	Enjoy high quality food and drink (gourmet)	65%	22	17	17	19	9	13	11	13

N.B. Due to cultural differences in how markets respond to certain question types, some markets are prone to mention a wider variety of needs. Therefore, results from key markets are presented in a ranked format e.g. enjoying the beauty of the landscape was the most frequently mentioned need in Germany.

Needs of international holiday travellers are fairly consistent across markets, but there are some notable variations. The order of importance for England's key markets are listed in the table above.

For example, 'experiencing things that are new to me' is a stronger holiday motivation for those from the US market (highlighted in green) and 'enjoying local specialities' is a particularly strong motivation for those from France.

Within the Chinese market, feeling connected to nature, being physically healthy and slowing down to a different pace of life are each strong holiday motivations compared with other markets.

Variation by holiday needs by market? / 2

Source: Global Segmentation (Arkenford)

% selecting 6/7 where 0 means wouldn't want at all and 7 means would definitely want			Importance rank within market							
			Germany	France	Spain	Italy	NL	USA	Australia	China
18.	Get some sun	62%	**9**	**4**	22	25	**3**	16	19	12
19.	Feel special or spoilt	56%	20	31	15	24	19	19	17	19
20.	Good shopping	55%	23	27	24	21	21	21	22	20
21.	Revisit places of nostalgic importance to me	55%	21	21	19	20	20	20	21	22
22.	Get off the beaten track	52%	19	19	30	**16**	26	22	24	24
23.	Do something environmentally sustainable / green	48%	25	24	25	26	28	32	28	21
24.	Visit places important to my family's history	48%	24	25	21	22	30	23	23	26
25.	Meet the locals	48%	**17**	20	20	18	23	24	**18**	28
26.	Meet and have fun with other tourists	46%	27	30	29	27	32	27	25	23
27.	Experience adrenalin filled adventures	43%	28	23	23	31	27	25	27	27
28.	Go somewhere that provided lots of laid on entertainment	42%	30	26	27	28	24	26	26	29
29.	Do something the children would really enjoy	41%	29	29	32	32	25	28	29	25
30.	Party	40%	32	22	26	23	22	30	31	30
31.	To participate in an active pastime or sport	38%	26	28	28	29	29	29	30	33
32.	Watch a sporting event	37%	31	32	31	33	31	31	33	32
33.	Do something useful like volunteering to help on a project	36%	33	33	33	30	33	33	32	31

N.B. Due to cultural differences in how markets respond to certain question types, some markets are prone to mention a wider variety of needs. Therefore, results from key markets are presented in a ranked format e.g. enjoying the beauty of the landscape was the most frequently mentioned need in Germany.

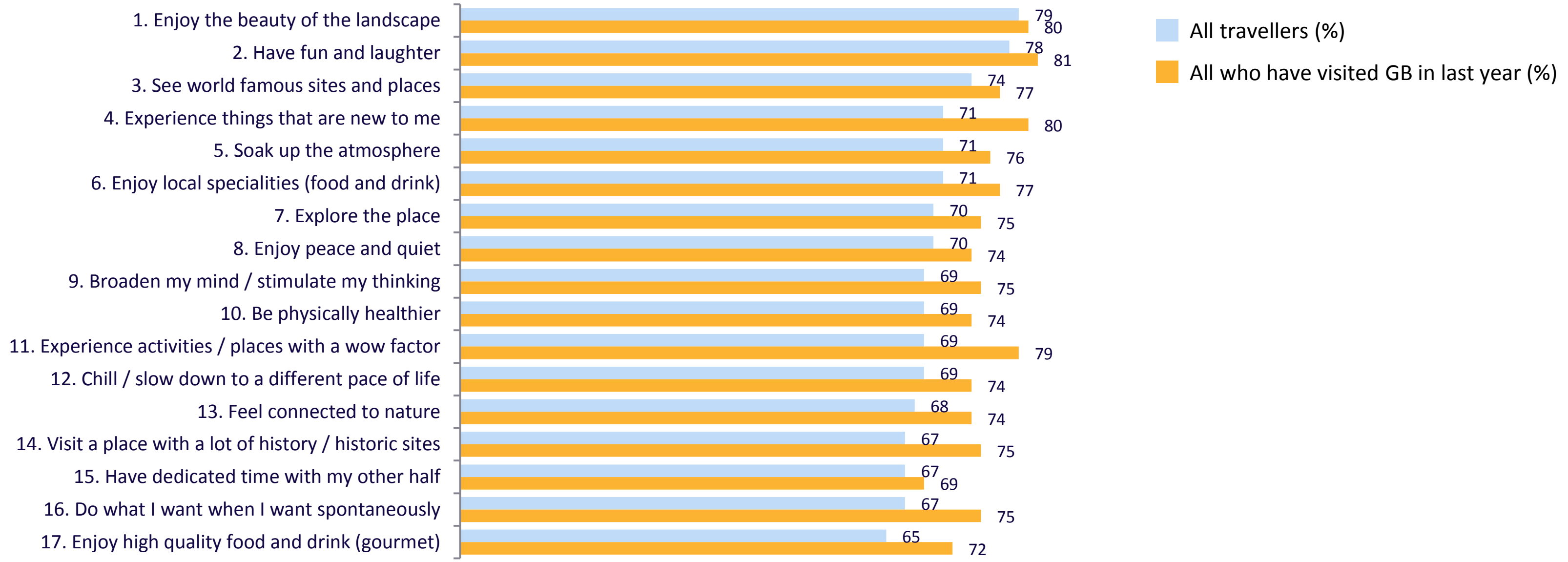
There are also some notable differences by market among the second tier of holiday needs.

Getting some sun is a much stronger motivation for those in the Netherlands, France and Germany.

Meeting the locals is more important to those from Germany and Australia and getting off the beaten track resonates particularly with those from Italy.

Holiday needs among those who have visited GB in past year* / 1

Source: Global Segmentation (Arkenford)



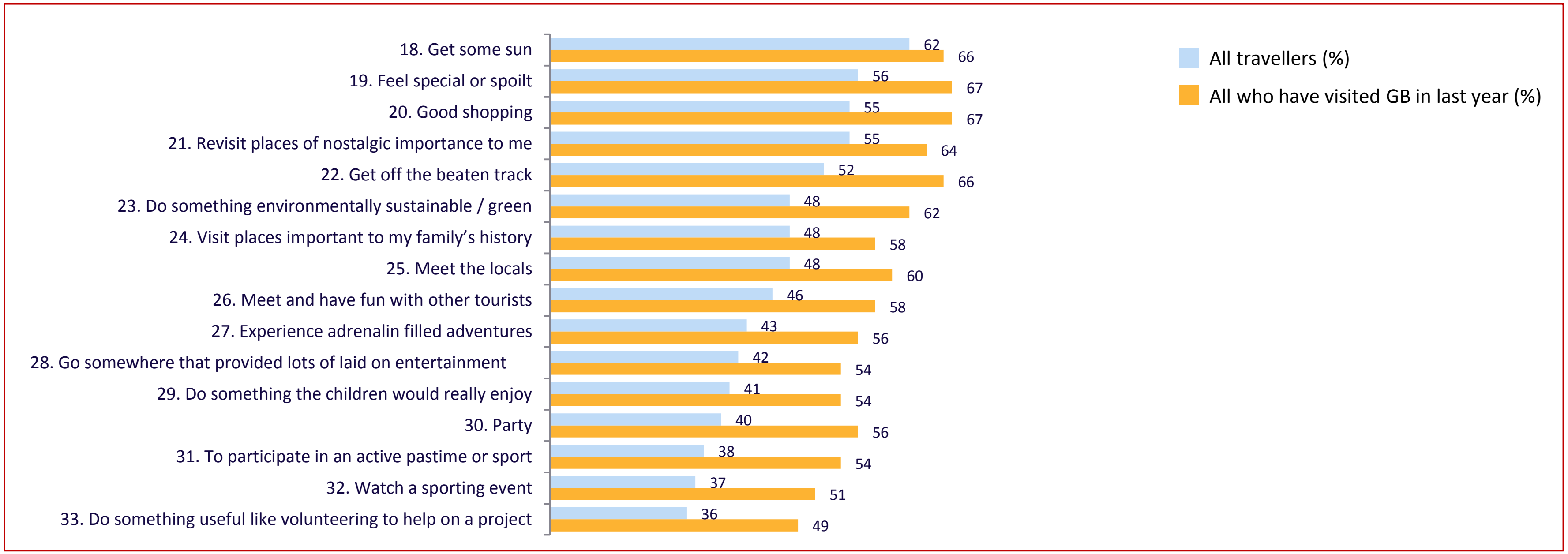
* Figures relate to general holiday needs of those who happen to have visited GB in the past year, not specific needs relating to that holiday in GB

The above chart details the overall holiday needs of those who have visited GB recently (although not necessarily needs on that specific GB holiday).

Aspects that particularly stand out as being a stronger motivator for those who have visited GB are ‘experiencing things which are new’ and ‘experiencing activities / places with a wow factor’.

Holiday needs among those who have visited GB in past year* / 2

Source: Global Segmentation (Arkenford)



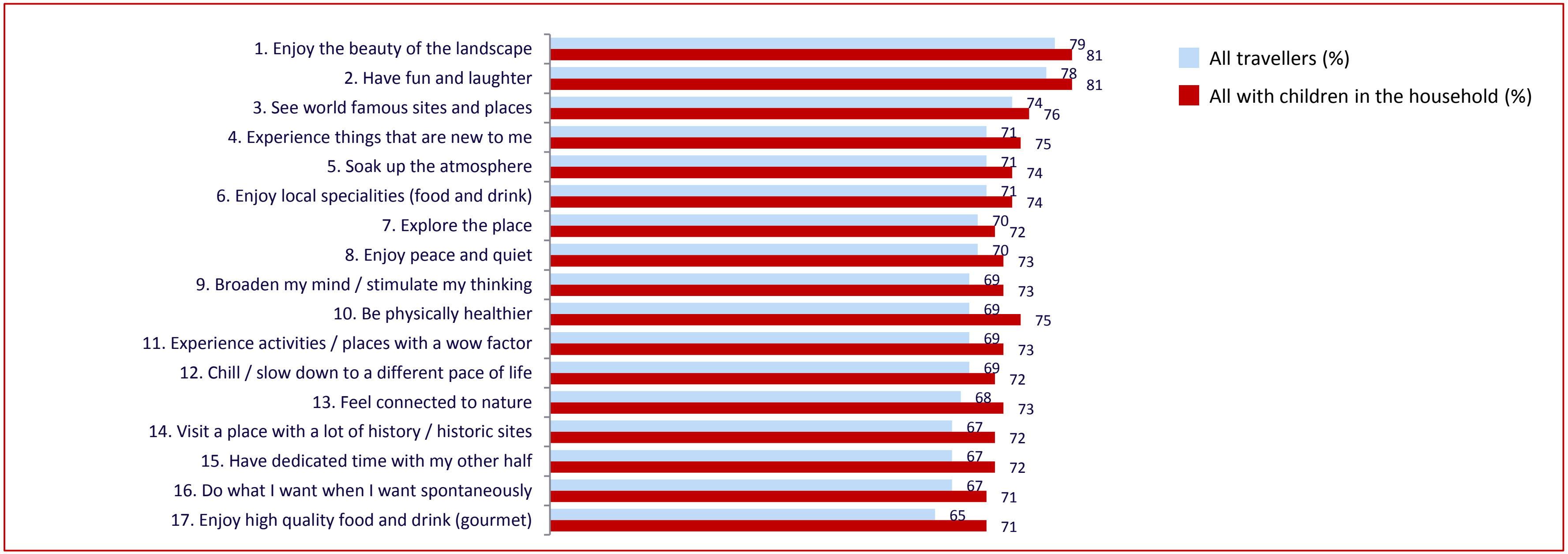
* Figures relate to general holiday needs of those who happen to have visited GB in the past year, not specific needs relating to that holiday in GB

Among the second tier of holiday needs, there are also some product-related holiday needs which stand out among those international travellers who have visited GB in the past year.

'Good shopping' is an overall holiday need for 67% of those who have visited GB. 'Getting off the beaten track', 'meeting the locals', 'doing something environmentally sustainable' and 'partying' also each much more likely to be holiday needs of those who have visited GB recently.

Holiday needs among families / 1

Source: Global Segmentation (Arkenford)



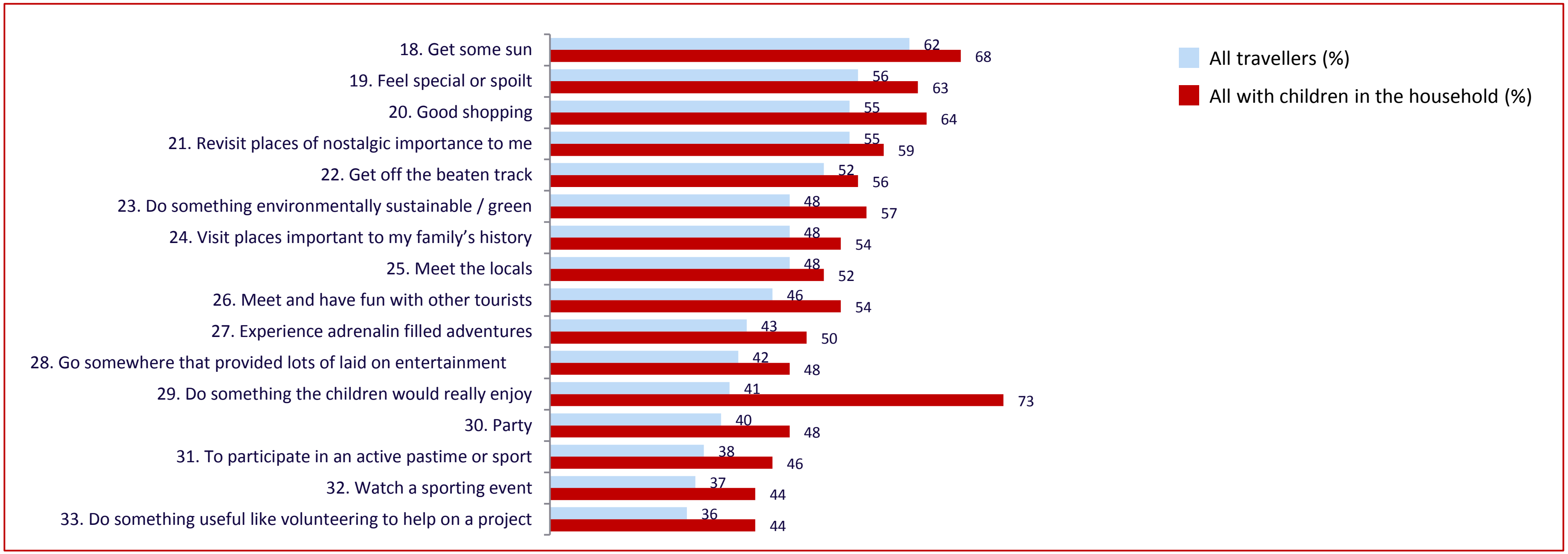
There are also some differences in holiday needs of international travellers with and without children.

Generally, those with children at home have a broader range of holiday needs than those without children.

Among the set of primary holiday needs, 'physical health' stands out as a strong need among those with children in their household. 'Experiencing things that are new' and 'feeling connected to nature' also stand out as being much more important among those with children.

Holiday needs among families / 2

Source: Global Segmentation (Arkenford)

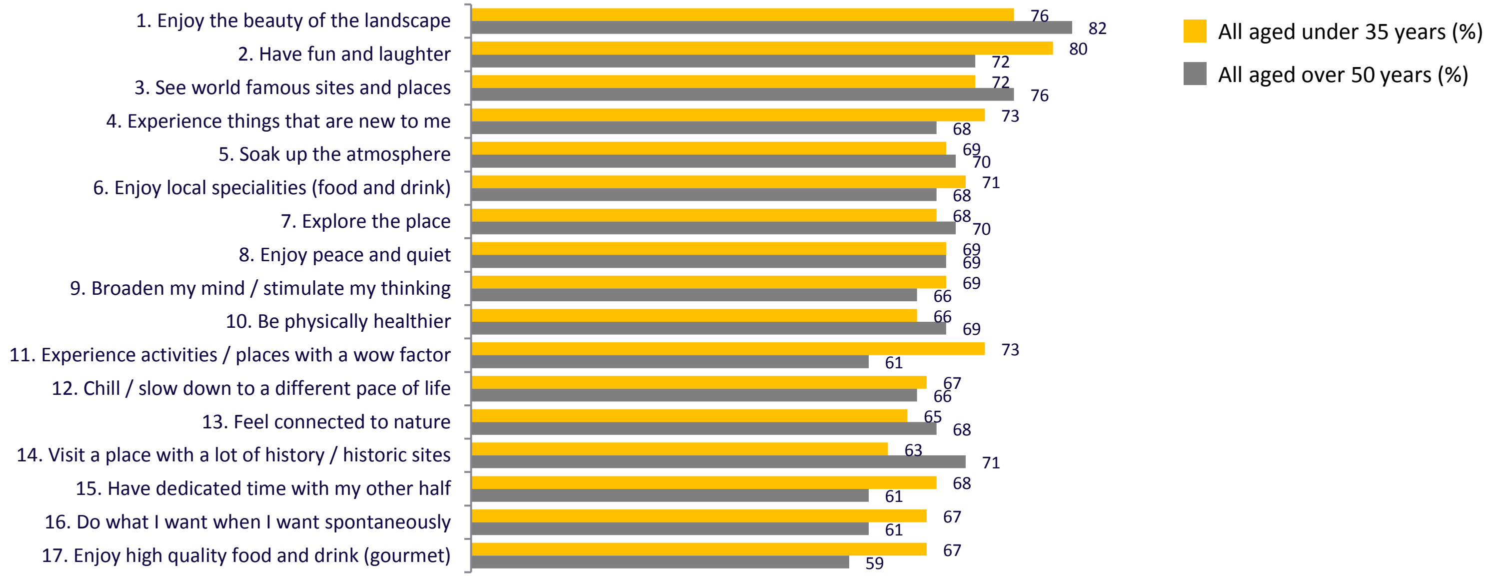


Among the second tier of holiday needs, 'good shopping', 'doing something environmentally sustainable' and 'meeting and having fun with other tourists' stand out as being a stronger holiday need among those with children.

Of course, those with children at home are much more likely to be child-focussed in their holiday needs, with 73% of those with children in the household feeling that 'doing something the children would enjoy' is a holiday need.

Holiday needs among younger and older travellers / 1

Source: Global Segmentation (Arkenford)

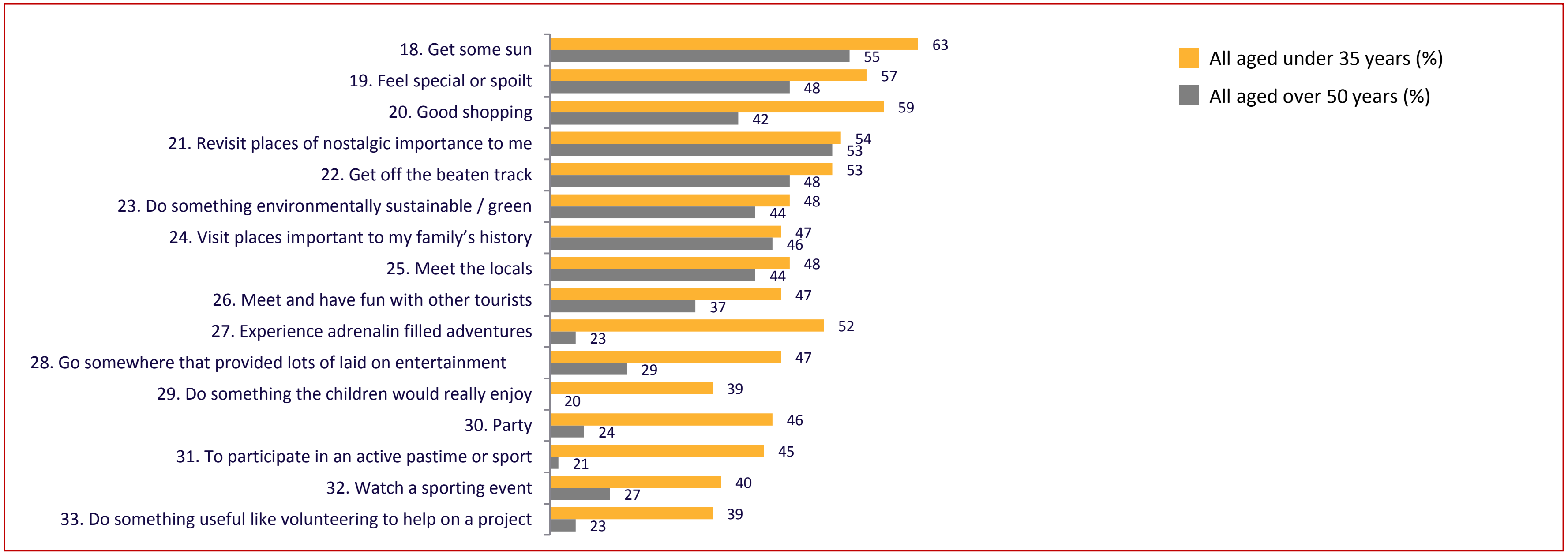


There are also some clues regarding the product-related needs of each of the younger and older international traveller categories. Those aged over 50 years are more likely to be motivated by 'enjoying the beauty of the landscape', 'seeing world famous sites and places' and 'visiting places with a lot of history/historic sites'. 'Physical health' is also a factor which is as important to this demographic as it is to international travellers as a whole.

The younger traveller is disproportionately motivated by 'having fun', 'experiencing activities/places with a wow factor', 'experiencing things that are new to me' and 'broadening my mind'. They are also more interested in 'spending time with their other half' and 'enjoying high quality food and drink'.

Holiday needs among younger and older travellers / 2

Source: Global Segmentation (Arkenford)

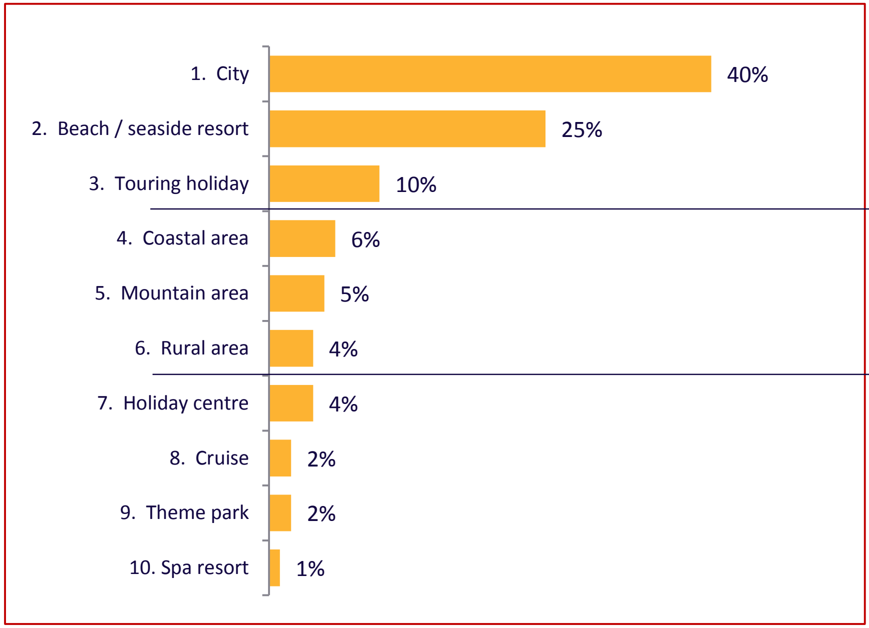


For the second tier of holiday needs (perhaps the less mainstream), older travellers are generally less likely to see these as requirements. Only 'revisiting places of nostalgic importance to me' and 'visiting places important to my family's history' come close to being a strong need among this demographic. The more 'traditional' holiday needs tend to be the focus for these older travellers.

Conversely, the younger traveller tends to be more motivated by some of these less mainstream holiday needs – particularly 'good shopping' and 'adrenalin adventures', but also 'entertainment' aspects, including parties or participating in / watching sport.

Favourite type of holiday destination in past 3-5 years - by market

Source: Global Segmentation (Arkenford)



Key Markets (%)							
Germany	France	Spain	Italy	NL	USA	Australia	China
29	38	**54**	**49**	31	37	35	42
20	22	11	8	15	22	20	**31**
8	13	7	13	11	9	12	10
17	10	11	11	**14**	7	9	3
5	4	5	4	**11**	5	6	4
9	5	6	2	**9**	5	7	3
8	2	1	3	4	3	2	4
2	2	3	4	<0.5	**8**	4	<0.5
<0.5	1	2	1	2	4	2	3
1	1	1	1	1	<0.5	1	<0.5

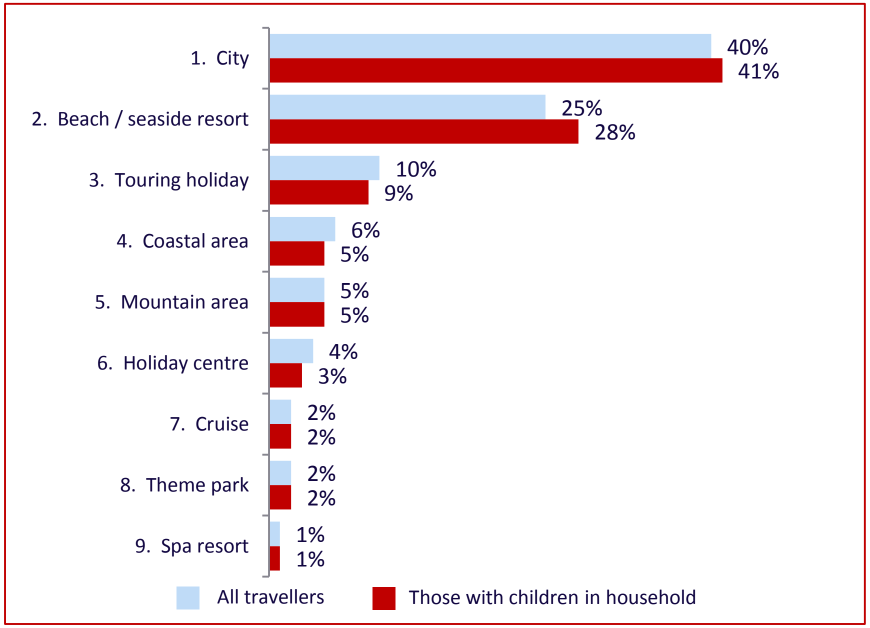
The above chart looks at favourite types of holiday destination among international holiday travellers and how these vary according to key source market. Again, this looks at global destinations and not specifically at GB.

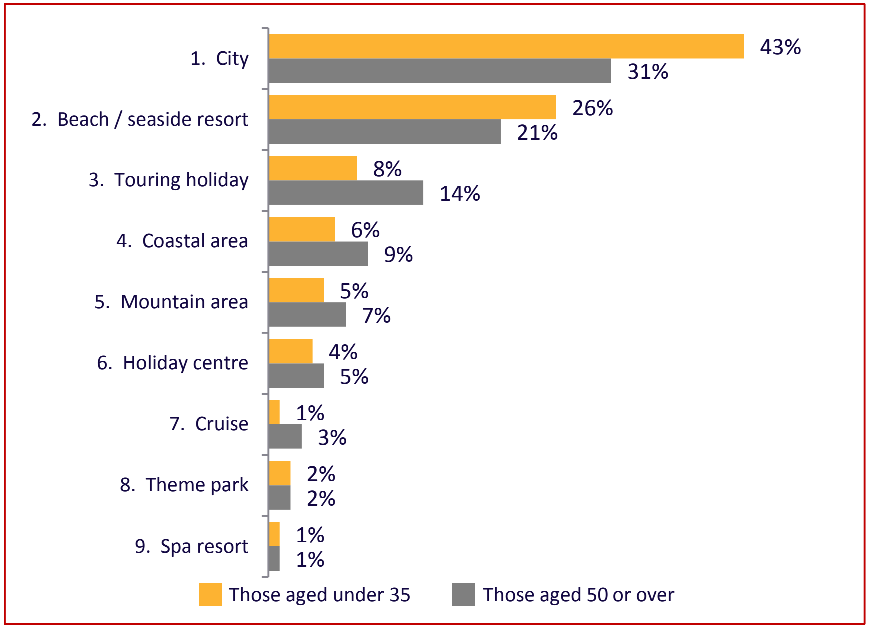
City destinations are clearly key, but particularly among travellers from Spain and Italy.

Beach / seaside resorts are the favourite type of holiday for 25% of travellers (especially likely to be the favourite among Chinese travellers), with a further 6% favouring coastal areas (Germany and the Netherlands rank highest among the key source markets here). Those from the Netherlands are also keenest of the key source markets on mountain areas.

Favourite type of holiday destination in past 3-5 years - younger/older travellers and families

Source: Global Segmentation (Arkenford)





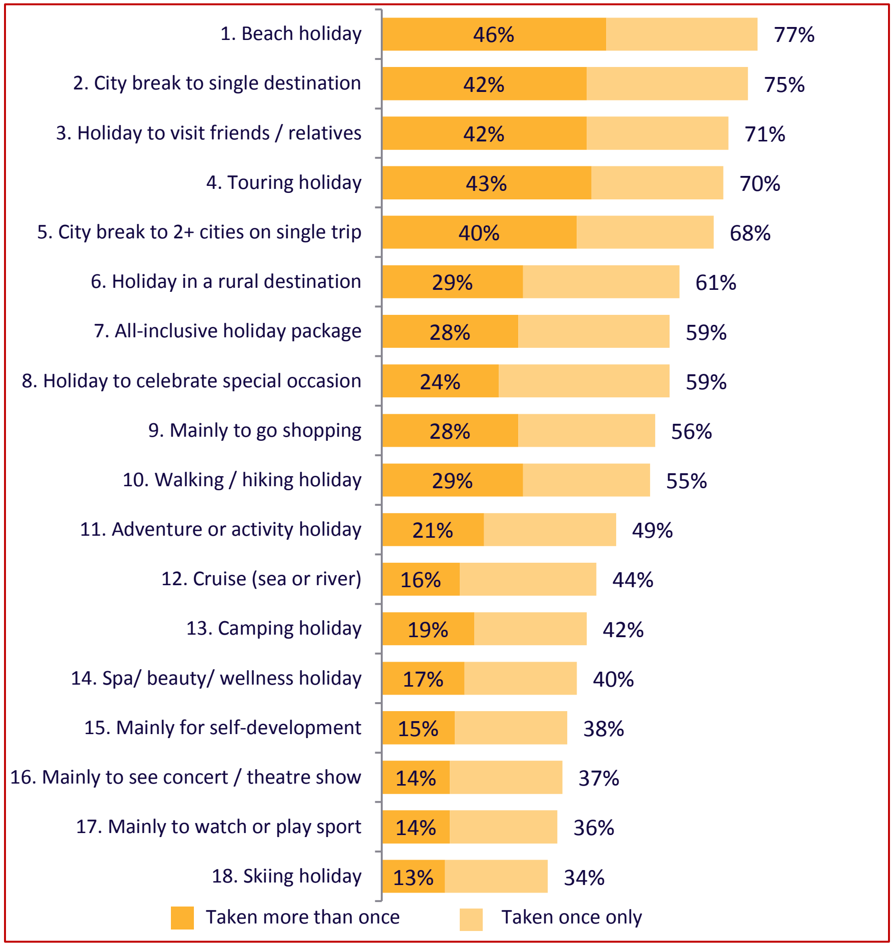
Those with children are more likely to favour beach/seaside resorts, although not significantly. City destinations are still the overwhelming favoured holiday type for this market.

There are some notable differences among older travellers however. They are much less likely to favour the city and beach/seaside destinations than younger travellers and much more likely to favour touring holidays, other coastal areas and mountain areas. This reflects their stronger needs to see 'natural beauty'.

City holidays and beach / seaside resorts particularly dominate among those aged under 35 years.

Types of holiday taken in the past 3-5 years

Source: Global Segmentation (Arkenford)



Beach holidays are the holiday type most likely to have been taken by international travellers in the past 3-5 years (77%), with 46% taking one more than once in this time.

Multi-destination holidays are also common, with 70% having taken a touring holiday and 68% a city break where two or more cities are visited on a single trip.

Of the specific activity holidays, 'walking/hiking holidays' are most common, with holidays 'mainly to go shopping' perhaps surprisingly high – 56% of travellers have taken this type of holiday in the past 3-5 years.

Of the emerging activities, 'spa/beauty/wellness' holidays have been taken by 40% of travellers, 'self-development' holidays by 38% and sport-related holidays by 36%.

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Types of holiday taken in the past 3-5 years - by market

Source: Global Segmentation (Arkenford)

Holiday type	%	Germany	France	Spain	Italy	NL	USA	Australia	China
		Rank Within Key Markets							
1. Beach holiday	77%	1	2	2	2	1	3	2	2
2. City break to single destination	75%	3	3	1	1	2	2	3	3
3. Holiday to visit friends / relatives	71%	2	1	3	3	5	1	1	8
4. Touring holiday	70%	11	5	12	6	10	5	5	**1**
5. City break to 2+ cities on single trip	68%	5	8	4	4	6	6	4	4
6. Holiday in a rural destination	61%	6	6	5	10	**3**	8	7	6
7. All-inclusive holiday package	59%	**4**	**4**	8	8	**4**	10	9	9
8. Holiday to celebrate special occasion	59%	7	7	6	7	9	**4**	6	10
9. Mainly to go shopping	56%	14	13	14	13	12	**12**	8	**5**
10. Walking / hiking holiday	55%	8	10	7	5	13	**11**	14	7
11. Adventure or activity holiday	49%	10	11	10	11	8	**7**	10	12
13. Cruise (sea or river)	44%	18	18	17	17	18	**9**	11	11
14. Camping holiday	42%	12	12	15	16	7	13	12	13
15. Spa/ beauty/ wellness holiday	40%	**9**	15	11	12	15	16	15	14
15. Mainly for self-development	38%	16	14	**9**	**9**	11	18	17	16
16. Mainly to see concert / theatre show	37%	13	16	13	15	17	14	13	18
17. Mainly to watch or play sport	36%	17	17	16	18	16	15	16	15
18. Skiing holiday	34%	15	**9**	18	14	14	17	18	17

N.B. Due to cultural differences in how markets respond to certain question types, some markets are prone to mention a wider variety of holidays taken. Therefore, results from key markets are presented in a ranked format e.g. beach holidays were the most frequently mentioned holiday type within the in German market.

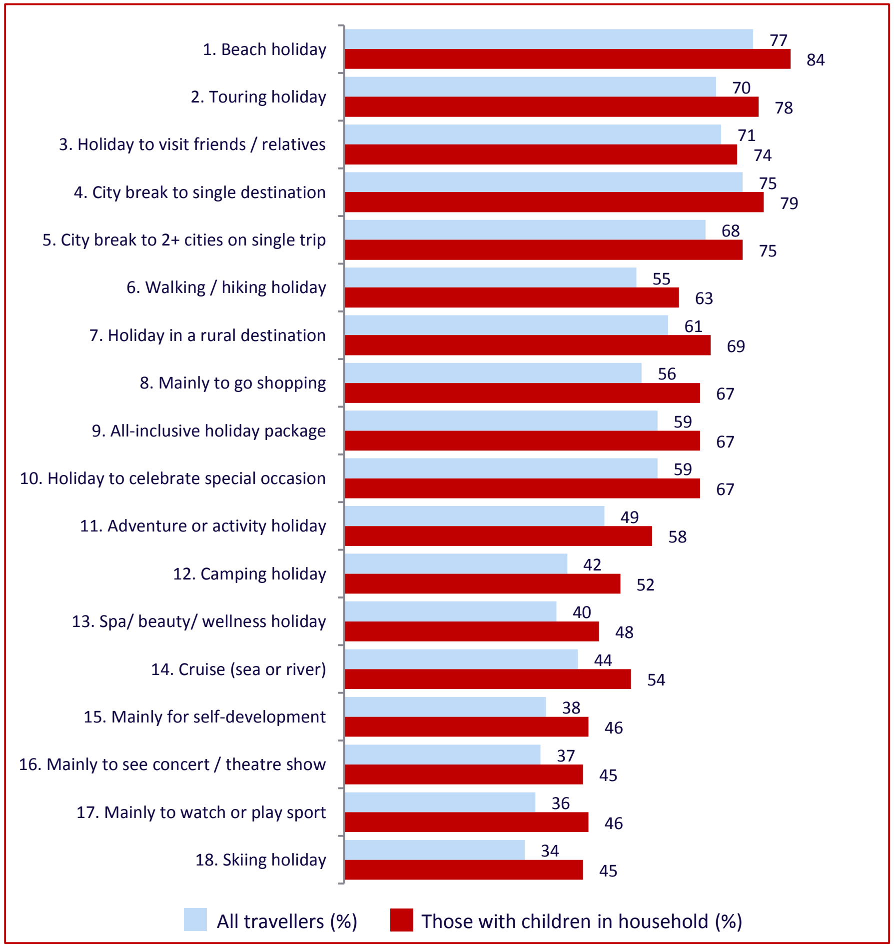
Types of holiday taken vary by market. This chart details the key source markets from the 23 included within the survey for each holiday type.

Holiday types highlighted in green rank particularly highly in that market relative to other markets. For example, those from the Netherlands are particularly likely to have holidayed in a rural destination compared with other markets.

Similarly, touring holidays are most popular among the Chinese market, but rank no higher than 5th most popular in any of the other key markets.

Types of holiday taken in the past 3-5 years - by families

Source: Global Segmentation (Arkenford)



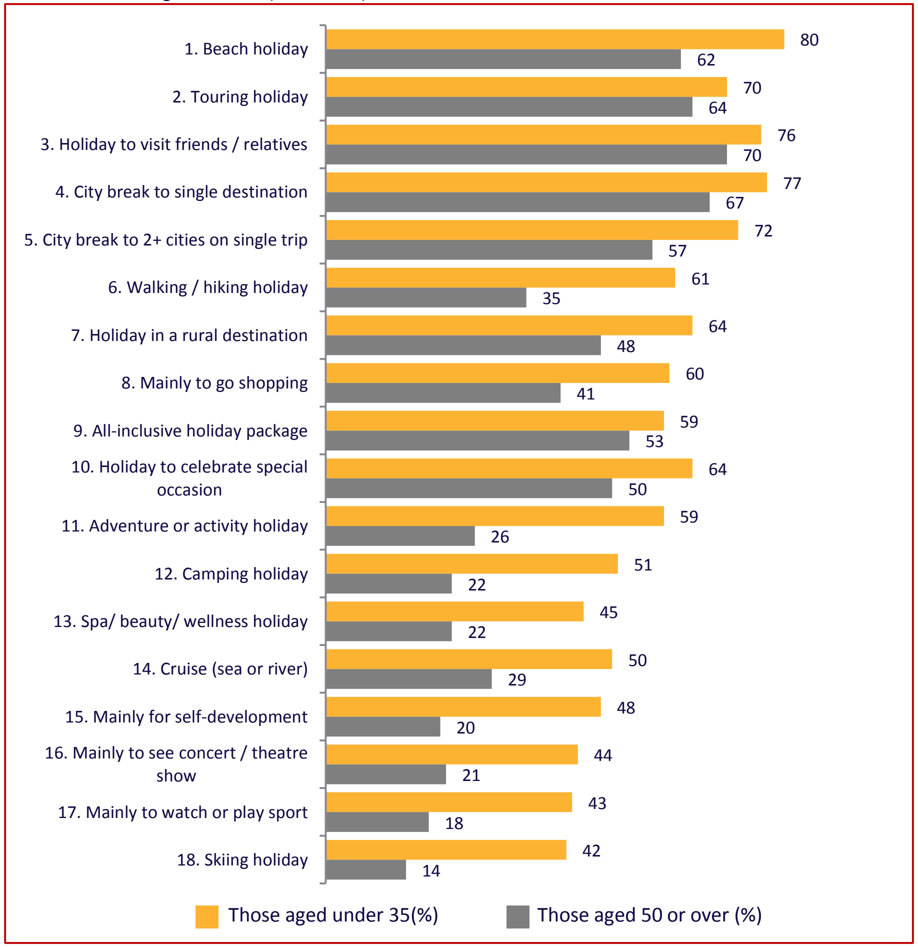
International travellers who have children at home tend to take a broader range of holidays in a 3-5 year period.

Holiday types which are at least nine percentage points higher among those with children in terms of likelihood to have taken in the past 3-5 years are:

- Shopping
- Adventure or activity holiday
- Camping holiday
- Cruise
- To watch / play sport
- Skiing

Types of holiday taken in the past 3-5 years – younger / older travellers

Source: Global Segmentation (Arkenford)



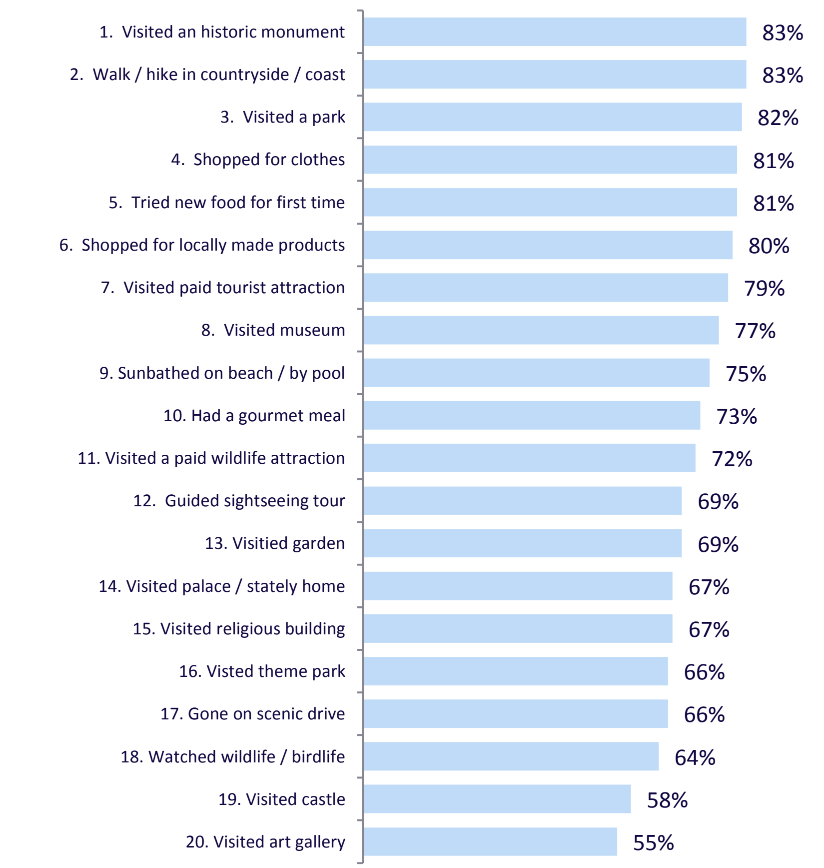
Younger travellers aged under 35 years are much more likely to have taken a broad range of different types of holiday in the past 3-5 years. They are particularly more likely than older travellers to have taken some of the holiday types mentioned less frequently overall, such as an adventure/activity holiday, camping holiday, wellness holiday, self-development holiday or other themed holidays – even cruises.

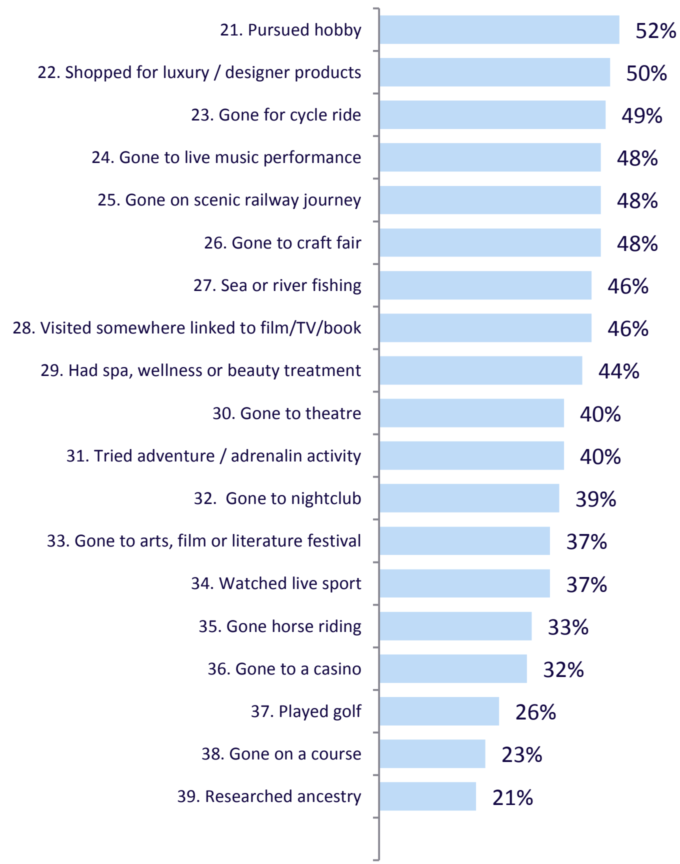
International travellers who are aged over 50 years are much less likely to take a range of holidays in the past 3-5 years. The only holiday types which come close to the average in terms of likelihood of taking are ‘holidays to visit friends/relatives’, ‘touring holidays’ and ‘all-inclusive holiday packages’.

This age cohort are currently much less likely to take themed holidays such as spa/beauty/wellness, self-development, shows or sport-related.

Activities taken part in on holiday in past 3-5 years - summary

Source: Global Segmentation (Arkenford)





Activities taken part in on holiday in past 3-5 years - by market / 1

Source: Global Segmentation (Arkenford)

Top 20 Activities	%	Germany	France	Spain	Italy	NL	USA	Australia	China
		Rank Within Key Markets							
1. Visited an historic monument	83%	7	1	1	1	5	8	7	2
2. Walk / hike in countryside / coast	83%	1	12	3	2	1	1	5	4
3. Visited a park	82%	6	6	2	7	6	2	2	7
4. Shopped for clothes	81%	4	3	12	5	4	4	**1**	8
5. Tried new food for first time	81%	5	7	6	3	9	3	3	6
6. Shopped for locally made products	80%	12	**2**	13	8	16	5	6	**3**
7. Visited paid tourist attraction	79%	10	13	10	13	**3**	7	**4**	**5**
8. Visited museum	77%	8	9	**4**	**4**	10	6	12	9
9. Sunbathed on beach / by pool	75%	**3**	4	5	6	**2**	11	15	10
10. Had a gourmet meal	73%	17	11	18	22	14	9	9	**1**
11. Visited a paid wildlife attraction	72%	9	16	14	15	12	12	11	11
12. Guided sightseeing tour	69%	15	14	17	18	17	14	14	16
13. Visited garden	69%	16	10	**7**	11	21	16	10	14
14. Visited palace / stately home	67%	13	20	11	12	15	19	17	15
15. Visited religious building	67%	21	8	8	9	8	17	13	18
16. Visited theme park	66%	20	21	15	20	13	13	19	13
17. Gone on scenic drive	66%	**2**	**5**	19	10	7	10	8	23
18. Watched wildlife / birdlife	64%	14	17	20	16	18	18	16	12
19. Visited castle	58%	11	15	**9**	14	11	28	25	19
20. Visited art gallery	55%	26	23	16	17	28	20	18	26

N.B. Due to cultural differences in how markets respond to certain question types, some markets are prone to mentioning a wider variety of activities taken on holiday. Therefore, results from key markets are presented in a ranked format e.g. visiting an historic monument was the seventh most frequently mentioned activity within the German market.

This and the previous chart detail the activities taken part in by international travellers over the past 3-5 years on any holiday. It details how participation in the Top 20 activities varies across key source markets and highlights in green the activities which are significantly more common within a given market. So, for example, 'having a gourmet meal' is the most frequently mentioned activity within the Chinese market, but only the 10th most frequently mentioned activity across the 23 markets overall.

Activities taken part in on holiday in past 3-5 years - by market / 2

Source: Global Segmentation (Arkenford)

Bottom 19 Activities	%	Germany	France	Spain	Italy	NL	USA	Australia	China
		Rank Within Key Markets							
21. Pursued hobby	52%	19	22	25	26	20	27	33	21
22. Shopped for luxury / designer products	50%	28	29	37	31	29	31	29	17
23. Gone for cycle ride	49%	18	19	33	21	19	25	32	25
24. Gone to live music performance	48%	24	24	23	34	26	21	22	28
25. Gone on scenic railway journey	48%	27	27	34	28	24	37	26	22
26. Gone to craft fair	48%	22	18	21	23	34	29	28	27
27. Sea or river fishing	46%	34	31	31	34	35	30	30	20
28. Visited somewhere linked to film/TV/book	46%	29	32	27	27	25	33	27	24
29. Had spa, wellness or beauty treatment	44%	23	26	24	25	30	32	24	29
30. Gone to theatre	40%	31	34	26	29	31	23	23	34
31. Tried adventure / adrenalin activity	40%	30	30	29	33	23	26	34	31
32. Gone to nightclub	39%	25	28	22	19	22	22	21	36
33. Gone to arts, film or literature festival	37%	35	35	30	35	32	34	35	32
34. Watched live sport	37%	32	33	28	30	27	24	31	33
35. Gone horse riding	33%	37	36	32	37	37	35	39	30
36. Gone to a casino	32%	33	25	35	32	33	15	20	38
37. Played golf	26%	39	38	39	39	36	36	36	35
38. Gone on a course	23%	36	37	36	36	38	39	38	37
39. Researched ancestry	21%	38	39	38	38	39	38	37	39

N.B. Due to cultural differences in how markets respond to certain question types, some markets are prone to mentioning a wider variety of activities taken on holiday. Therefore, results from key markets are presented in a ranked format e.g. visiting an historic monument was the seventh most frequently mentioned activity within the German market.

This chart details how participation in the Bottom 19 activities varies across the key source markets. So, for example, visiting a casino is the 15th most frequently mentioned activity within the US market compared with being the 36th most frequently mentioned activity across the 23 markets as a whole.

Activities taken part in on holiday in past 3-5 years - by families

Source: Global Segmentation (Arkenford)

		All	Children in household			All	Children in household
1.	Visited an historic monument	83%	**84%**	21.	Pursued hobby	52%	**59%**
2.	Walk / hike in countryside / coast	83%	**87%**	22.	Shopped for luxury / designer products	52%	**60%**
3.	Visited a park	82%	**84%**	23.	Gone for cycle ride	49%	**56%**
4.	Shopped for clothes	81%	**85%**	24.	Gone to live music performance	48%	**54%**
5.	Tried new food for first time	81%	**83%**	25.	Gone on scenic railway journey	48%	**57%**
6.	Shopped for locally made products	80%	**84%**	26.	Gone to craft fair	48%	**55%**
7.	Visited paid tourist attraction	79%	**82%**	27.	Sea or river fishing	46%	**57%**
8.	Visited museum	77%	**80%**	28.	Visited somewhere linked to film/TV/book	46%	**53%**
9.	Sunbathed on beach / by pool	75%	**80%**	29.	Had spa, wellness or beauty treatment	44%	**50%**
10.	Had a gourmet meal	73%	**78%**	30.	Gone to theatre	40%	**46%**
11.	Visited a paid wildlife attraction	72%	**80%**	31.	Tried adventure / adrenalin activity	40%	**49%**
12.	Guided sightseeing tour	69%	**73%**	32.	Gone to nightclub	39%	**42%**
13.	Visited garden	69%	**72%**	33.	Gone to arts, film or literature festival	37%	**46%**
14.	Visited palace / stately home	67%	**71%**	34.	Watched live sport	37%	**46%**
15.	Visited religious building	67%	**68%**	35.	Gone horse riding	33%	**43%**
16.	Visited theme park	66%	**77%**	36.	Gone to a casino	32%	**34%**
17.	Gone on scenic drive	66%	**70%**	37.	Played golf	26%	**33%**
18.	Watched wildlife / birdlife	64%	**72%**	38.	Gone on a course	23%	**29%**
19.	Visited castle	58%	**63%**	39.	Researched ancestry	21%	**26%**
20.	Visited art gallery	55%	**58%**				

This chart looks at how activities taken part in by international travellers on holiday differs among those with children in the household. Generally, those with children in the household are more likely to take part in a variety of activities over the course of their holidays during the past 3-5 years.

In particular, they are much more likely to have visited a theme park, gone on a scenic railway journey, gone sea/river fishing, tried an adventure/adrenalin activity, attended a festival, watched live sport or gone horseriding.

Activities taken part in on holiday in past 3-5 years - by younger / older travellers

Source: Global Segmentation (Arkenford)

		All	Aged under 35	Aged 50+			All	Aged under 35	Aged 50+
1.	Visited an historic monument	83%	**82%**	**83%**	21.	Pursued hobby	52%	**57%**	**41%**
2.	Walk / hike in countryside / coast	83%	**84%**	**78%**	22.	Shopped for luxury / designer products	52%	**51%**	**36%**
3.	Visited a park	82%	**81%**	**79%**	23.	Gone for cycle ride	49%	**55%**	**34%**
4.	Shopped for clothes	81%	**82%**	**71%**	24.	Gone to live music performance	48%	**51%**	**37%**
5.	Tried new food for first time	81%	**81%**	**76%**	25.	Gone on scenic railway journey	48%	**51%**	**39%**
6.	Shopped for locally made products	80%	**78%**	**80%**	26.	Gone to craft fair	48%	**47%**	**44%**
7.	Visited paid tourist attraction	79%	**79%**	**74%**	27.	Sea or river fishing	46%	**50%**	**33%**
8.	Visited museum	77%	**77%**	**78%**	28.	Visited somewhere linked to film/TV/book	46%	**52%**	**31%**
9.	Sunbathed on beach / by pool	75%	**75%**	**65%**	29.	Had spa, wellness or beauty treatment	44%	**45%**	**32%**
10.	Had a gourmet meal	73%	**71%**	**73%**	30.	Gone to theatre	40%	**44%**	**32%**
11.	Visited a paid wildlife attraction	72%	**72%**	**63%**	31.	Tried adventure / adrenalin activity	40%	**52%**	**18%**
12.	Guided sightseeing tour	69%	**66%**	**68%**	32.	Gone to nightclub	39%	**46%**	**28%**
13.	Visited garden	69%	**67%**	**71%**	33.	Gone to arts, film or literature festival	37%	**43%**	**20%**
14.	Visited palace / stately home	67%	**66%**	**67%**	34.	Watched live sport	37%	**43%**	**22%**
15.	Visited religious building	67%	**67%**	**68%**	35.	Gone horse riding	33%	**39%**	**17%**
16.	Visited theme park	66%	**70%**	**47%**	36.	Gone to a casino	32%	**32%**	**28%**
17.	Gone on scenic drive	66%	**66%**	**61%**	37.	Played golf	26%	**27%**	**15%**
18.	Watched wildlife / birdlife	64%	**62%**	**58%**	38.	Gone on a course	23%	**31%**	**11%**
19.	Visited castle	58%	**59%**	**50%**	39.	Researched ancestry	21%	**25%**	**12%**
20.	Visited art gallery	55%	**55%**	**54%**					

Once again, those aged under 35 years tend to be much more likely to have taken part in each individual activity during the past 3-5 years than older travellers. The only activities in which older travellers are more likely to participate than travellers overall are visiting museums, visiting gardens and visiting religious buildings. They are also as likely as other age cohorts to visit historic monuments, shop for locally made products, have a gourmet meal and visit a palace or stately home.

Again, younger travellers have a greater appetite for a wider range of activities across their holidays, especially the more physically active areas such as theme park visiting, adrenalin activities and playing golf, but also activities which ‘broaden horizons’ such as going on a course or going to arts/literature festivals.

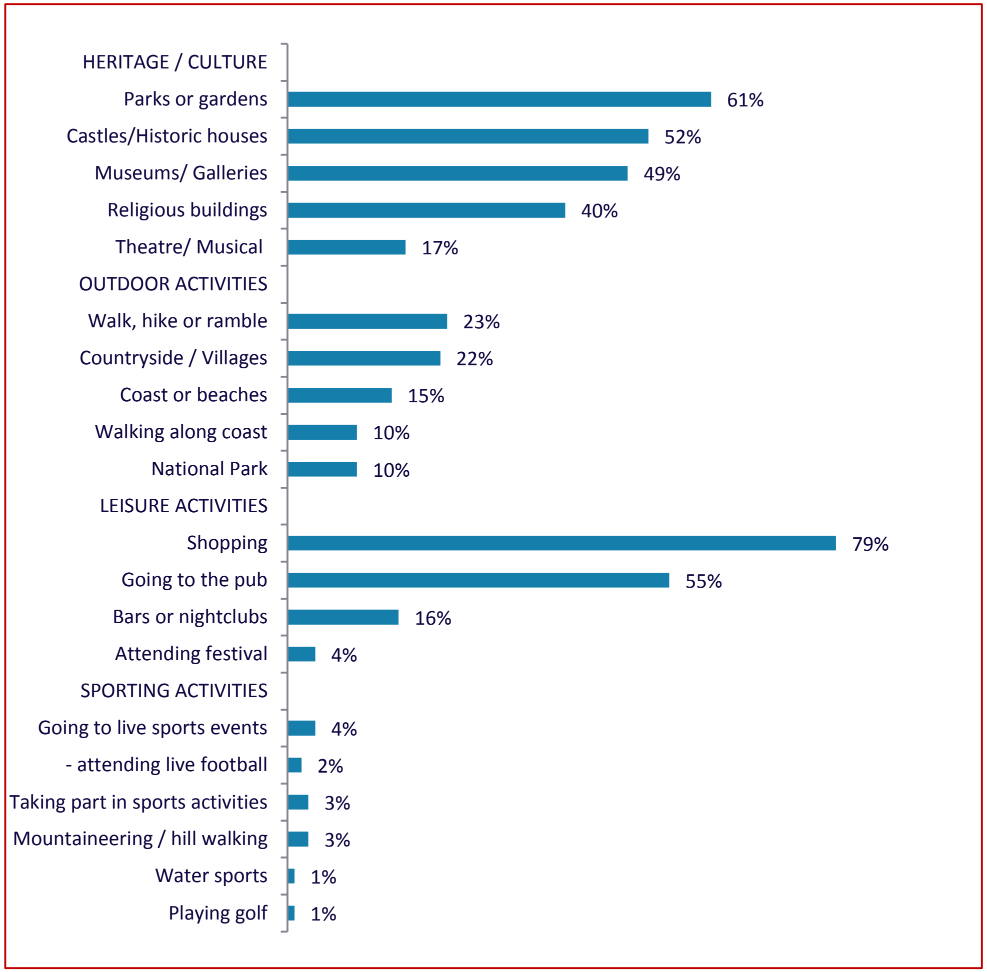
What activities does England deliver?

Data taken predominantly from International Passenger Survey data from 2010-2014. During these years, a range of 'participation in activities' questions were asked covering a range of activities during this period

N.B. Although these activities questions were also asked as far back as 2006, it was felt that data prior to 2010 was now insufficiently up-to-date.

Participation in activities on holiday in England

Source: IPS 2010, 2011, 2014



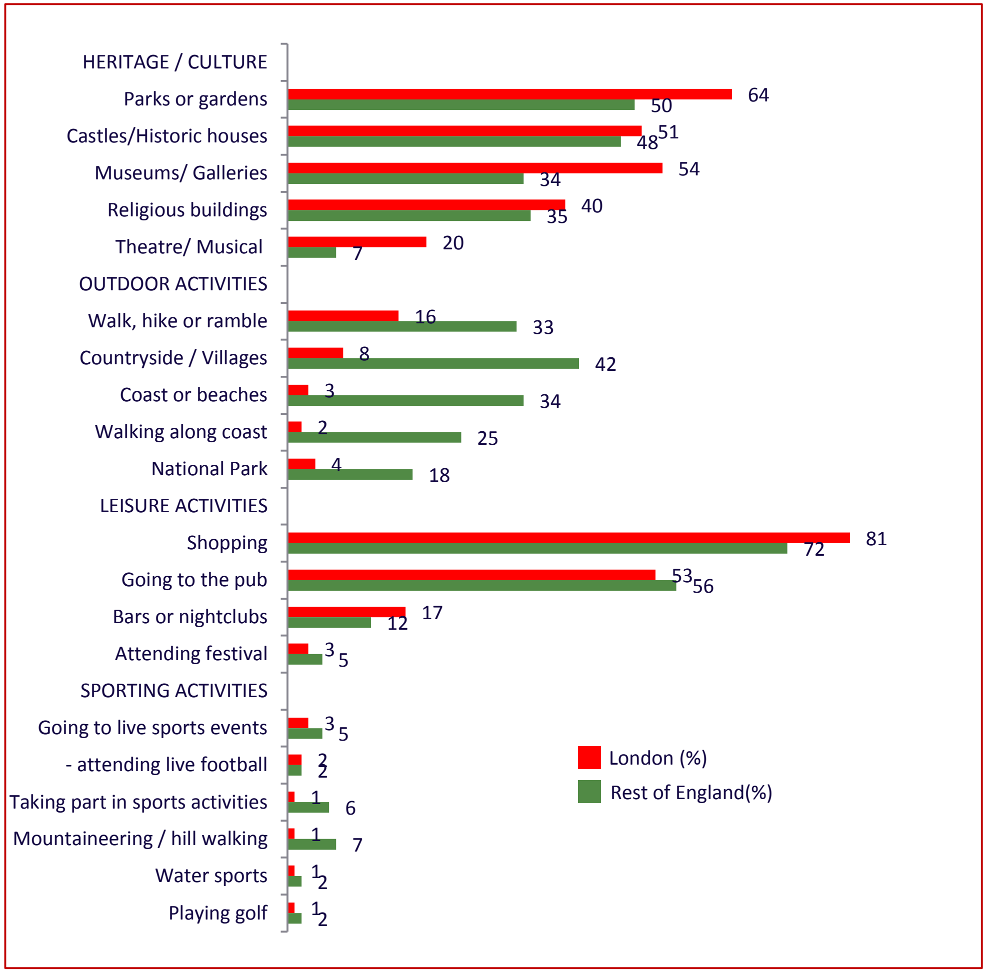
Between 2010 and 2014, VisitBritain added supplementary questions to the International Passenger Survey on specific activities overseas visitors conducted in England on their holiday.

In line with motivations and perceptions, the activities conducted centred on England's sight-seeing offer. Of the activities mentioned, 4 of the top 6 were heritage or culture venues. Shopping and visits to the pub also featured very highly.

England's rural offer, be it visits to the countryside/villages or going to the coast/beaches featured further down the list.

Participation in activities on holiday in England's regions

Source: IPS 2010, 2011, 2014



N.B. Data compares overseas visitors staying only in London with other overseas visitors who stayed only in other regions of England.

The chart shows how participation in activities differs between those staying in London and those staying elsewhere in England.

Heritage and culture activities are currently much more likely to be undertaken by those staying in London, particularly visiting museums / galleries, visiting parks / gardens and going to the theatre / musicals.

Conversely, those staying outside of London are self-evidently much more likely to be taking part in outdoor activities such as visiting the countryside or coast. Indeed, those staying outside of London are more likely to be visiting the countryside/villages than visiting museums/galleries.

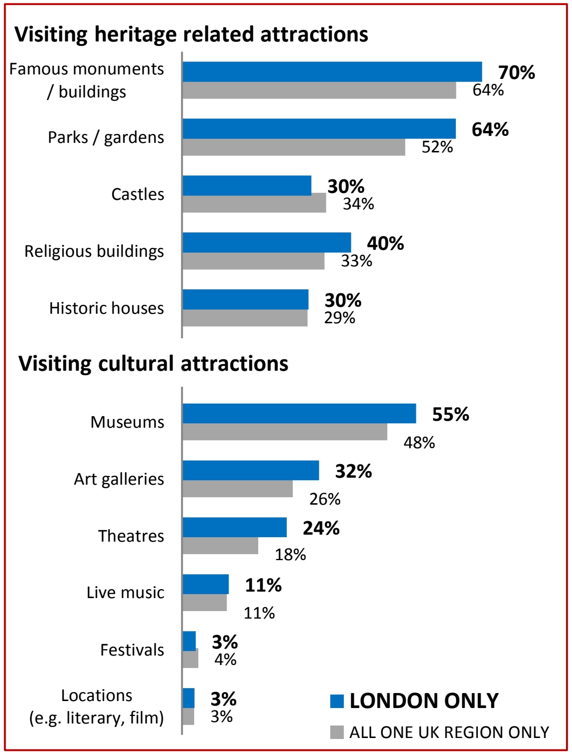
A third of those staying outside of London visit the coast or beaches. A small proportion (3%) of those staying in London also visit the coast – taking day trips outside of London.

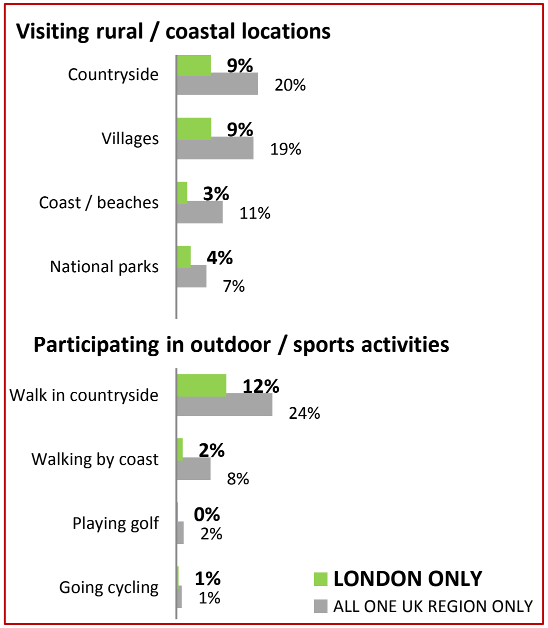
Shopping is an extremely popular holiday activity, both in London and elsewhere, as is visiting pubs.

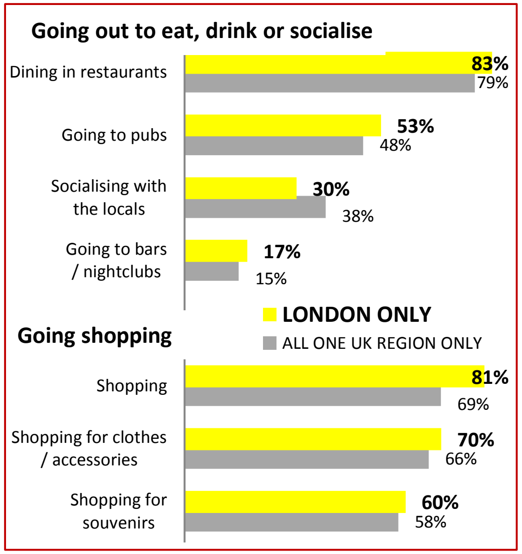
Sporting activities are also slightly more popular outside of London.

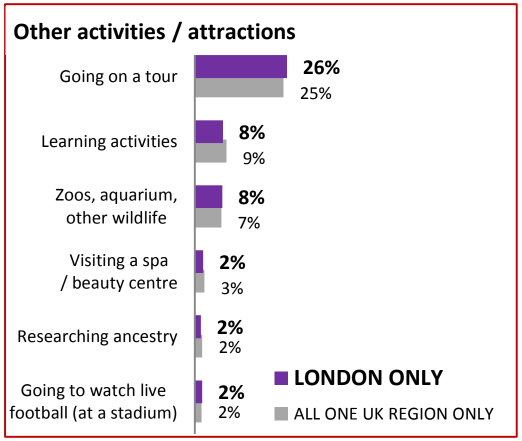
London – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity







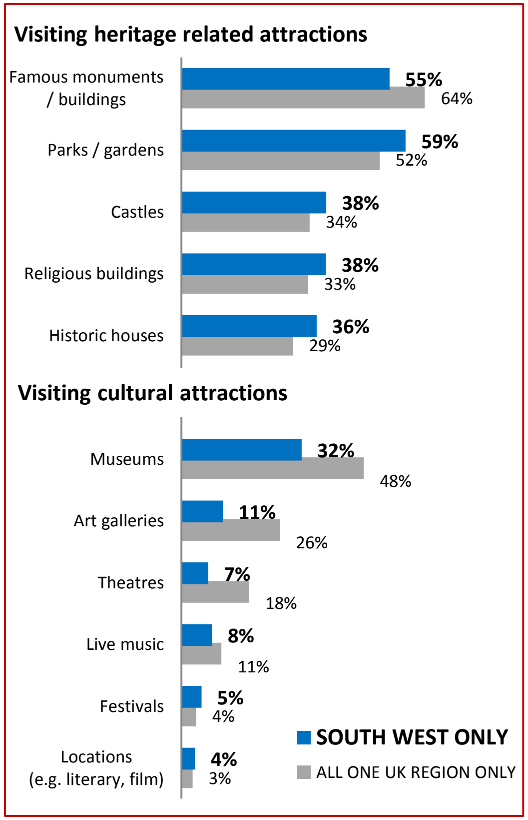


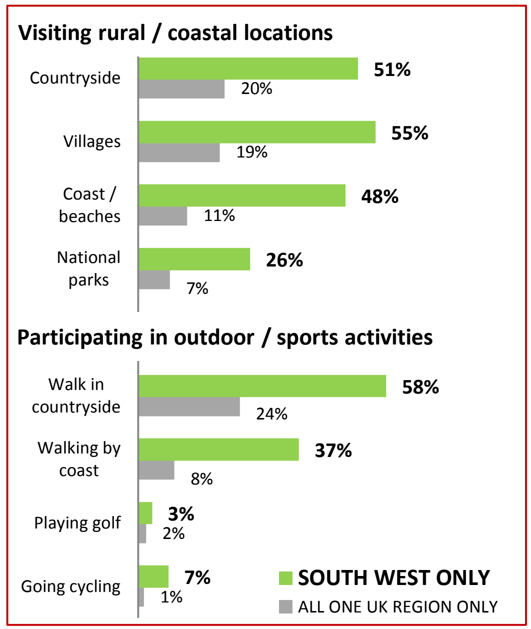
N.B. Data compares overseas visitors staying only in London with other overseas visitors who stayed only in another region of the UK.

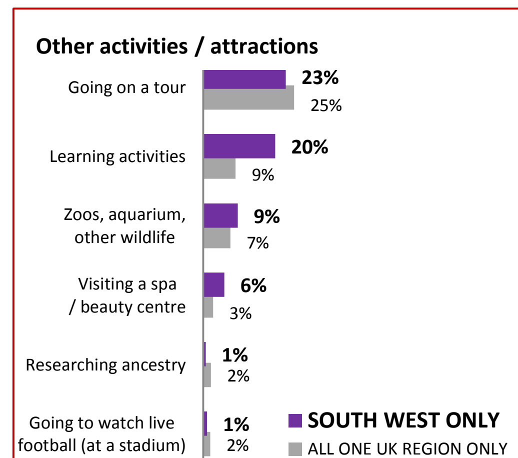
Source: IPS

South West – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity





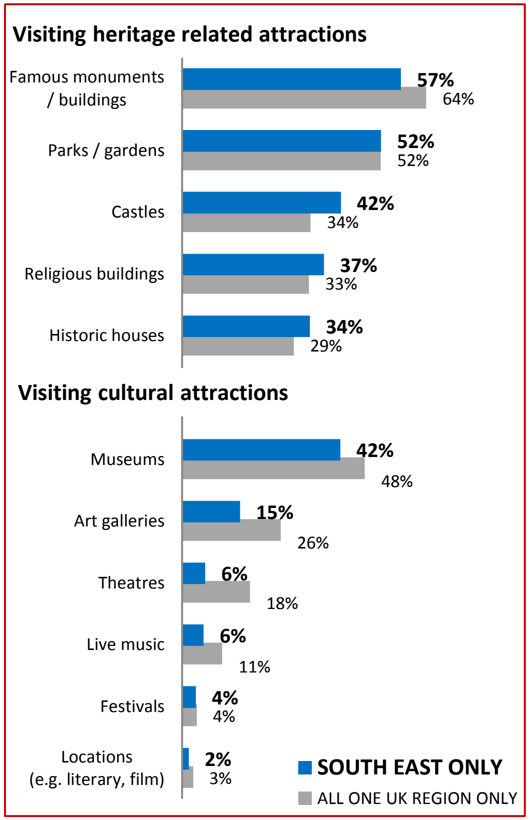


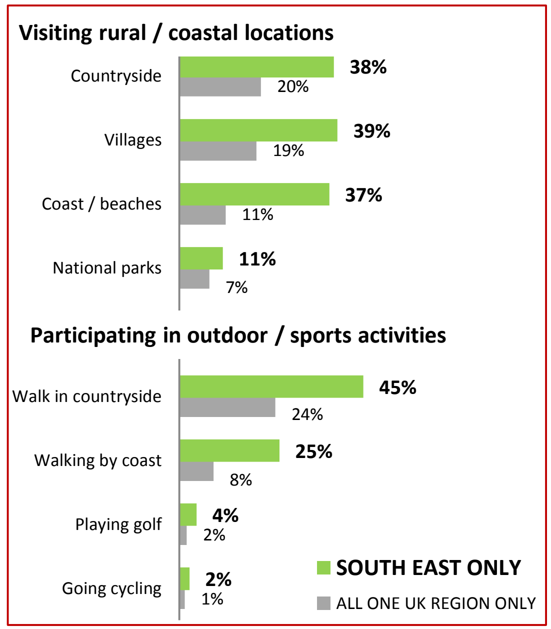
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

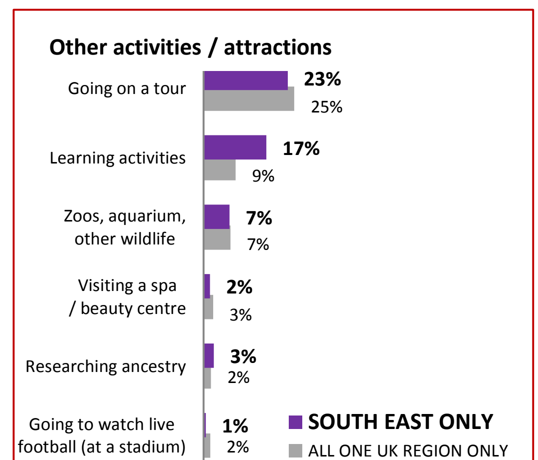
Source: IPS

South East (excl. London) – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity





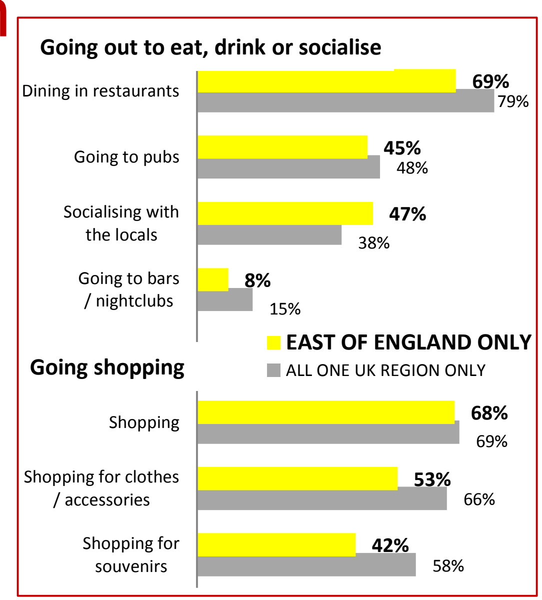


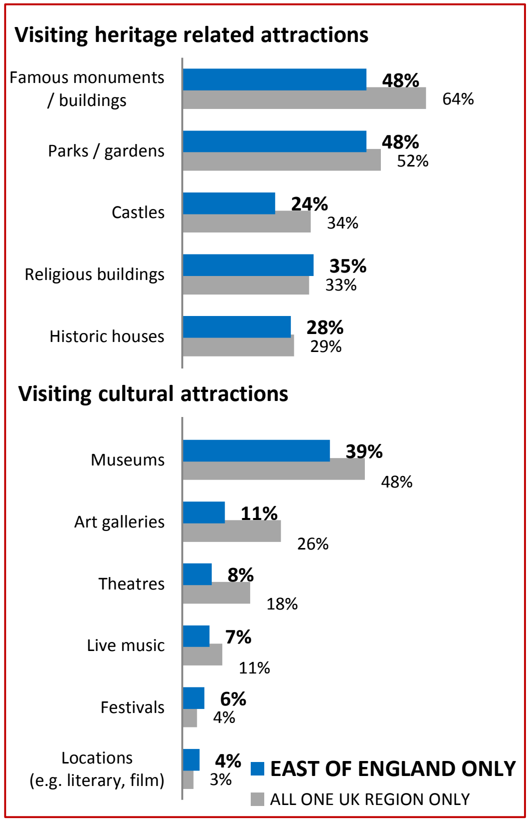
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

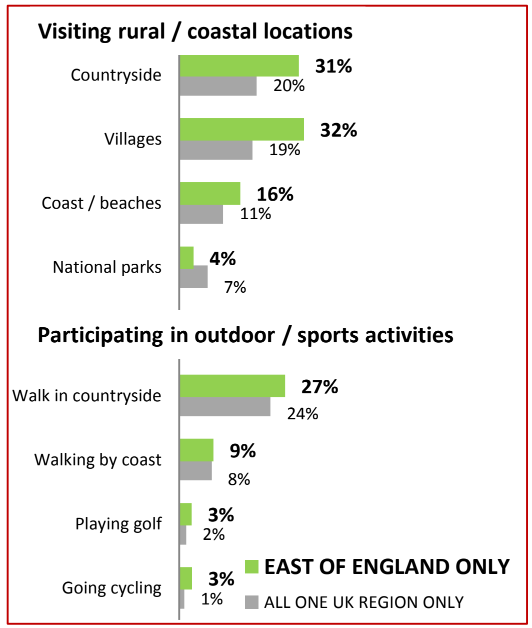
Source: IPS

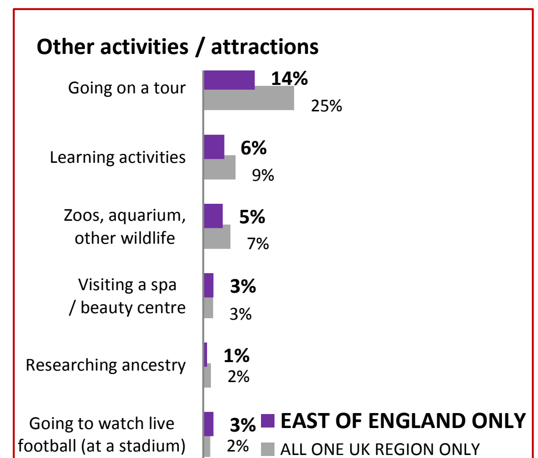
East England– activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity







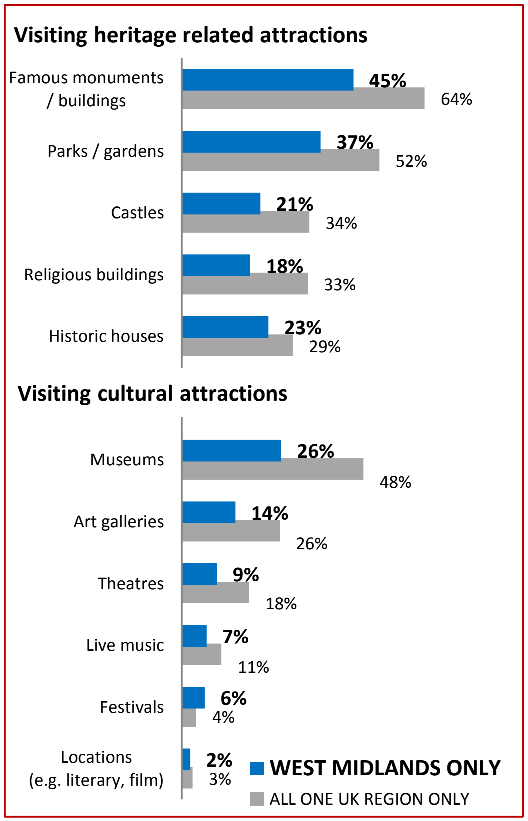


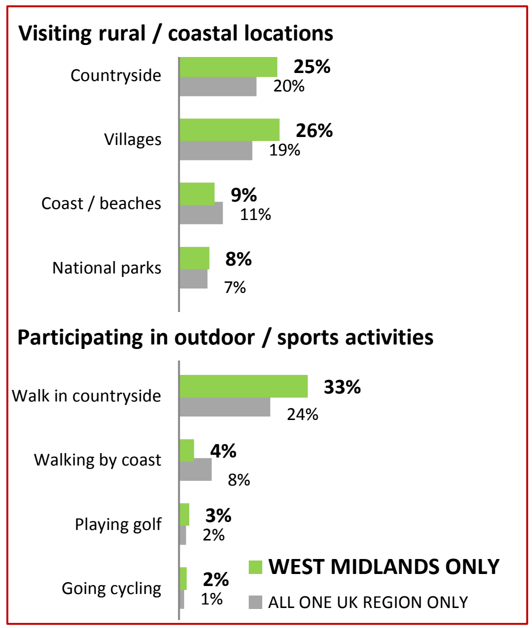
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

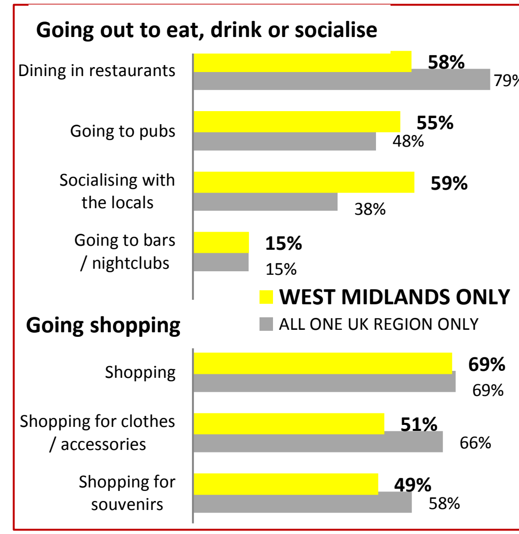
Source: IPS

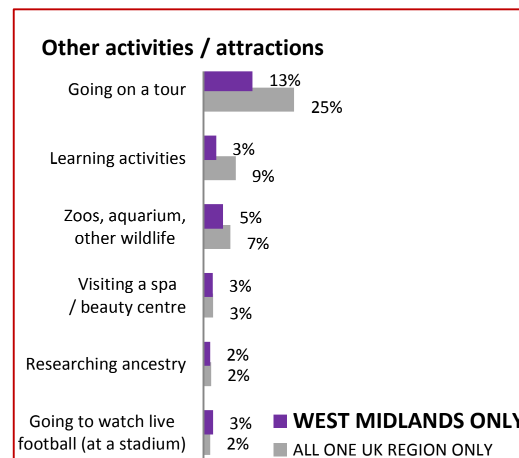
West Midlands – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity







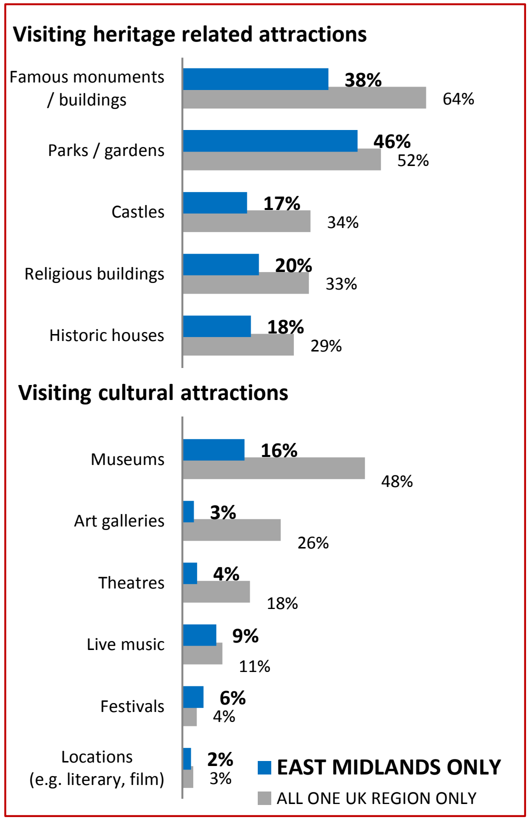


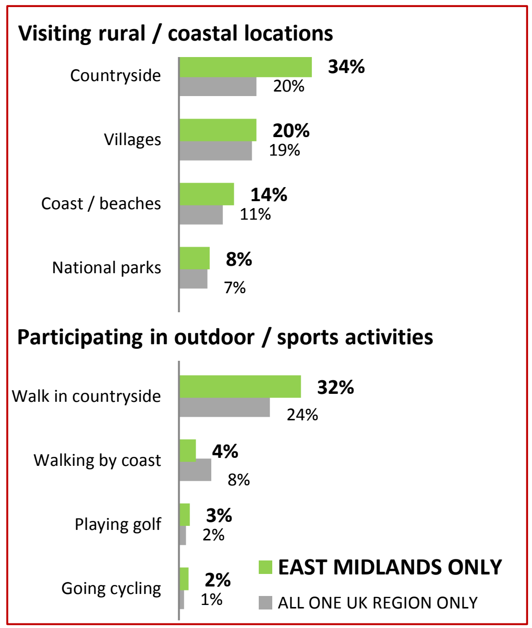
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

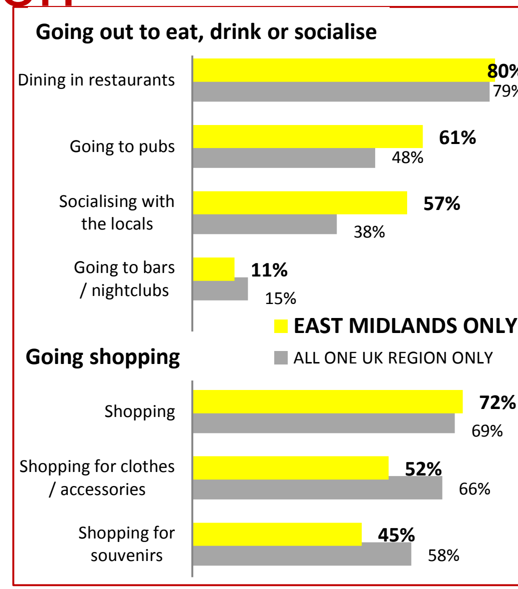
Source: IPS

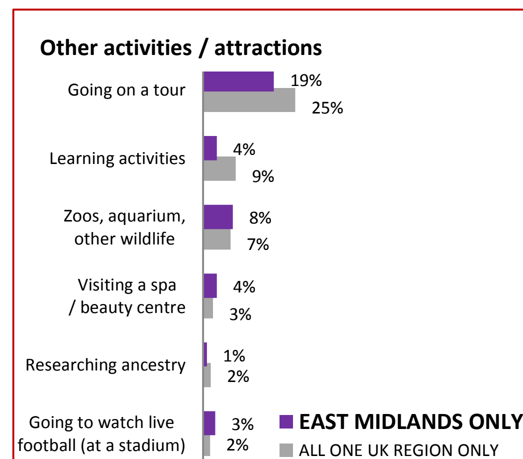
East Midlands – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity







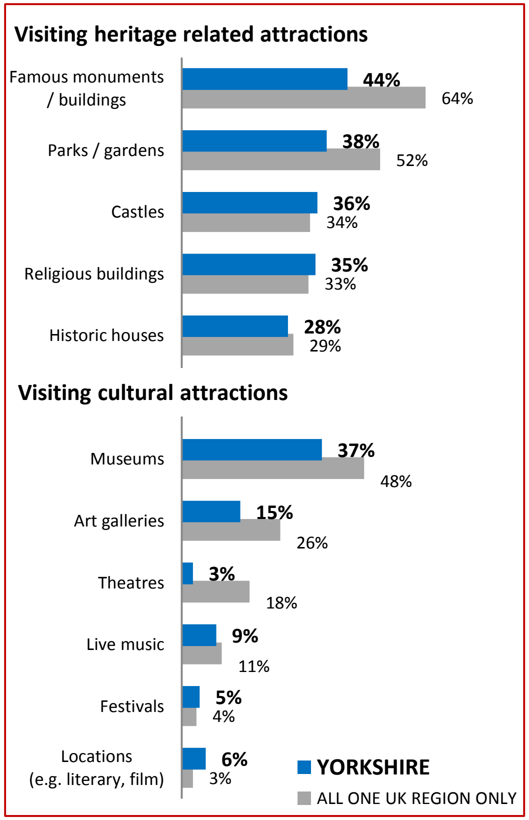


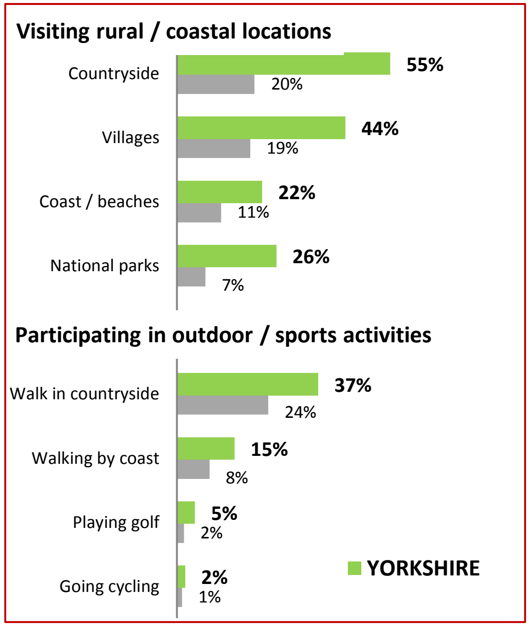
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

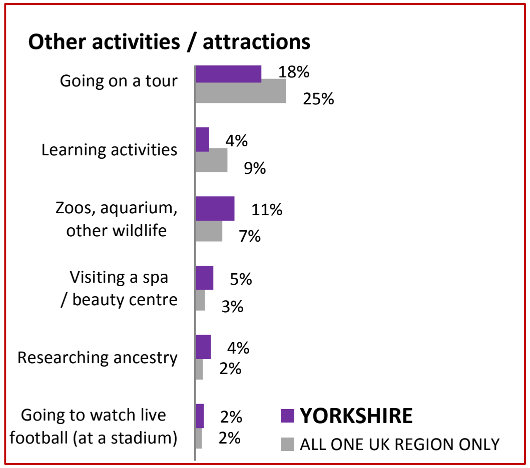
Source: IPS

Yorkshire – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity





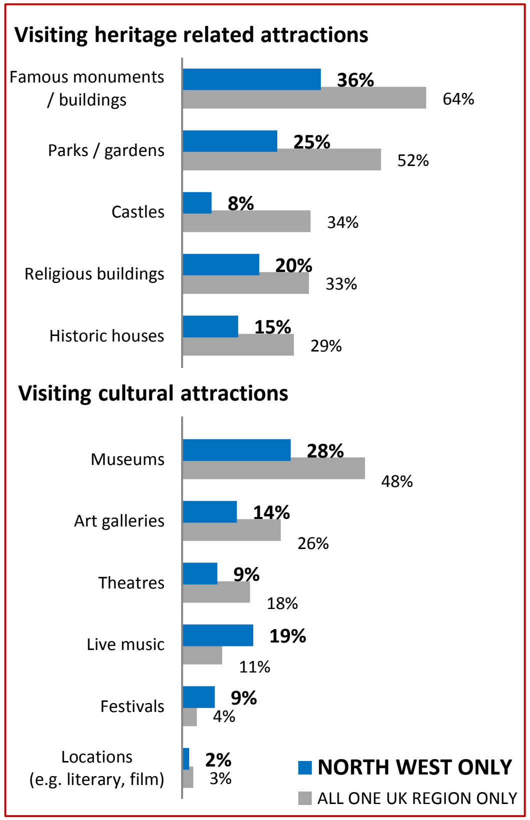


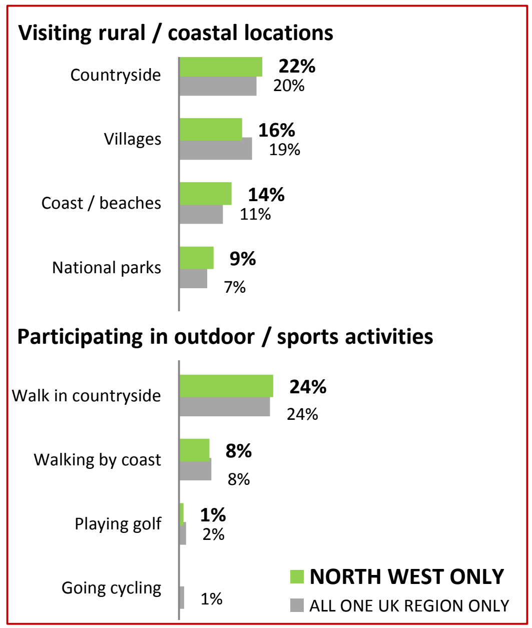
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

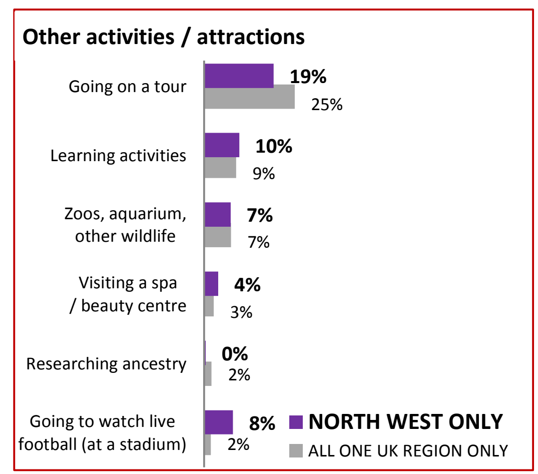
Source: IPS

North West England – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity





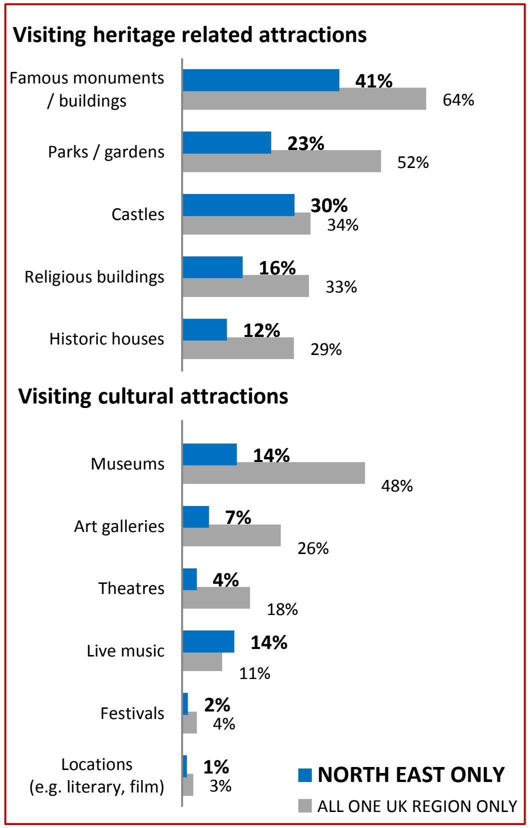


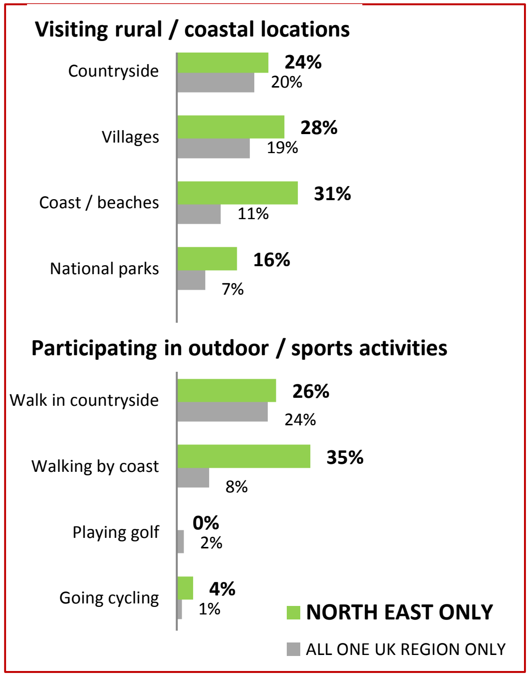
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

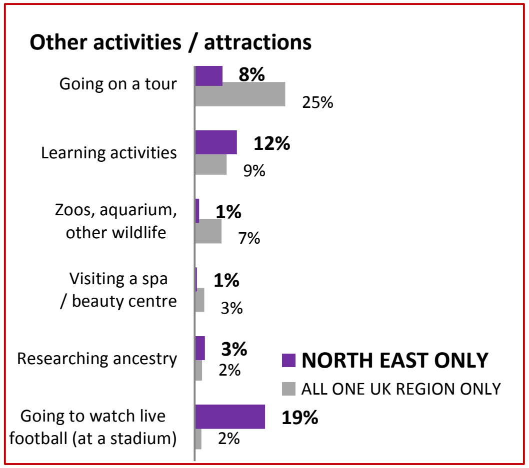
Source: IPS

North East England – activity participation

Charts illustrate the % of visitors staying in the region who take part in each activity







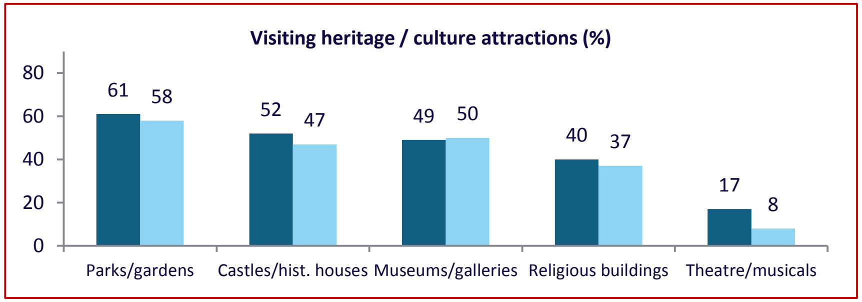
N.B. Data compares overseas visitors staying only in the South West with other overseas visitors who stayed only in another region of the UK (including London).

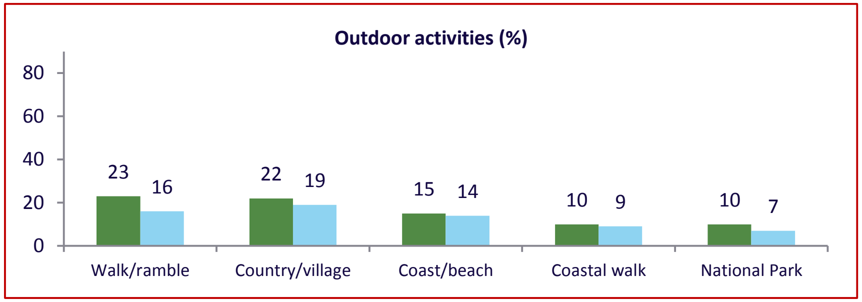
Source: IPS

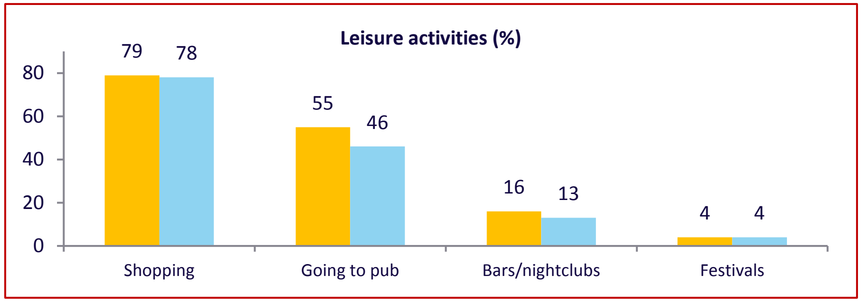
Activity participation by source market / France

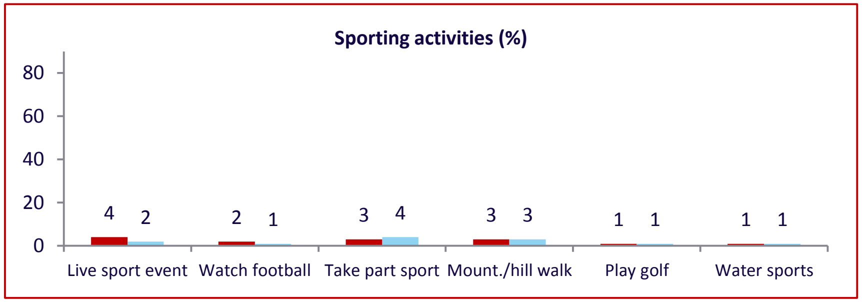
Source: IPS 2010-2014

N.B. Left hand bars represent ‘All markets’, right hand bars represent visitors from France









As a short haul, shorter length of stay destination, visitors from France are generally less likely to take part in each activity than inbound markets to England overall – shorter stay means less opportunity to take part in an activity.

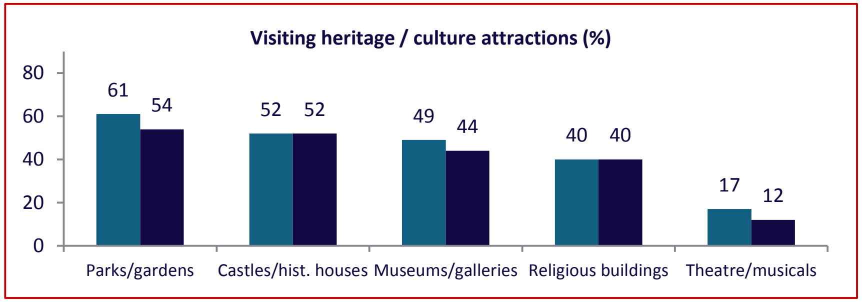
Nevertheless, visitors from France are much less likely to go to the theatre/musicals, go for a walk/ramble and especially, go to a pub.

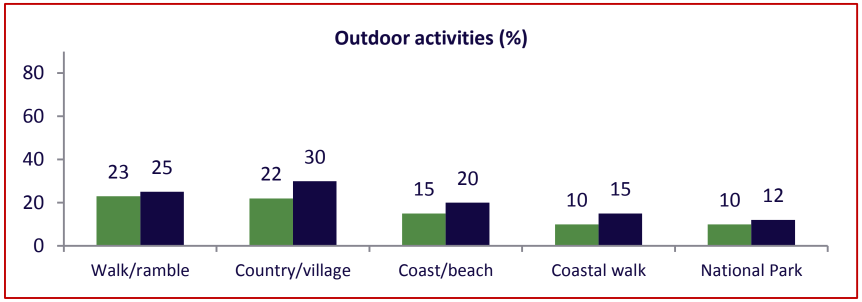
Conversely, they are slightly more likely to visit museums/galleries and take part in sport than other markets and almost as likely to go shopping, visit the coast/beach and go on a coastal walk and visit festivals

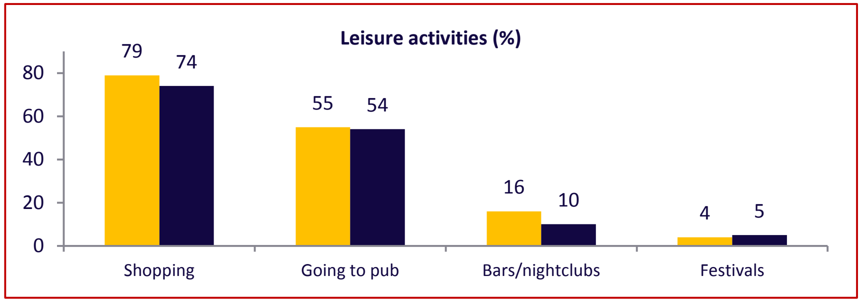
Activity participation by source market / Netherlands

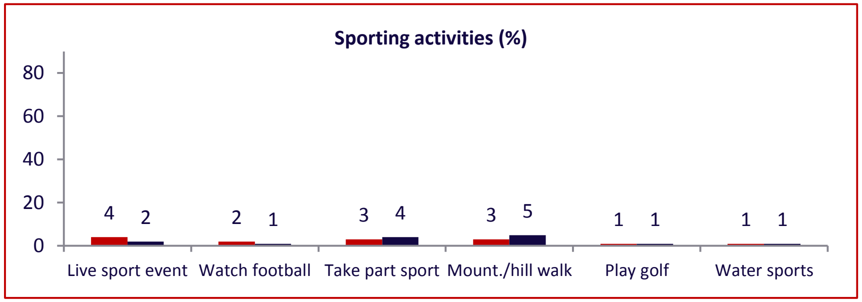
Source: IPS 2010-2014

N.B. Left hand bars represent 'All markets', right hand bars represent visitors from Netherlands









Visitors from the Netherlands are much more likely to take part in outdoor activities than inbound markets to England overall. They are more likely to visit the coast and the countryside / villages and go mountain/hill walking.

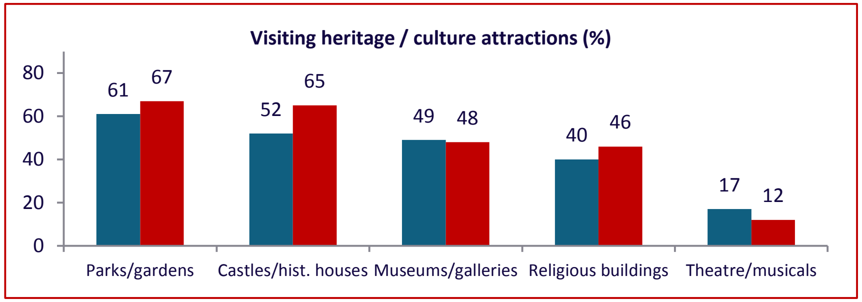
Although still strong, visitors from the Netherlands are less likely to go shopping in England while on holiday. They are also less likely to visit bars/nightclubs and go to the theatre/musicals.

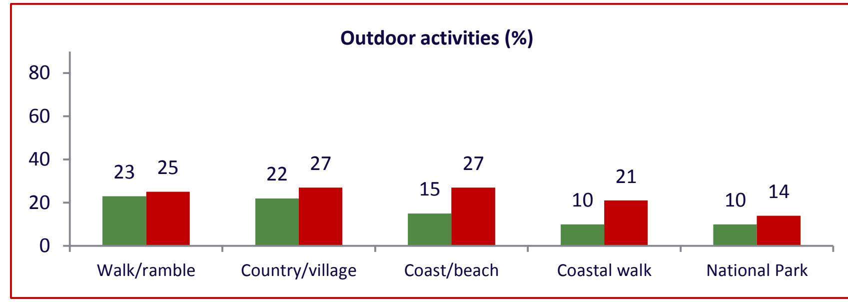
Whilst as likely to visit castles/historic houses, visitors from the Netherlands are less likely to visit other cultural venues such as museums/galleries and parks/gardens or visit a live sports event.

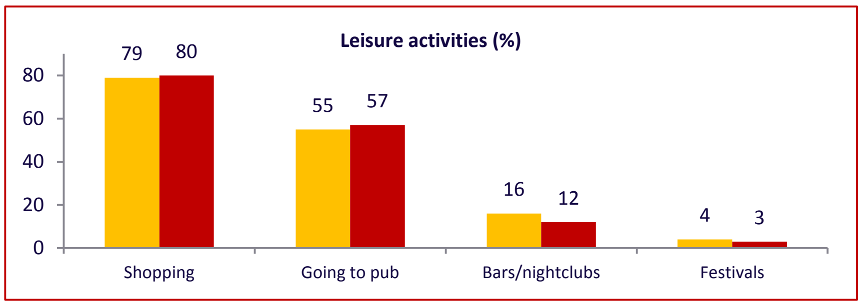
Activity participation by source market / Germany

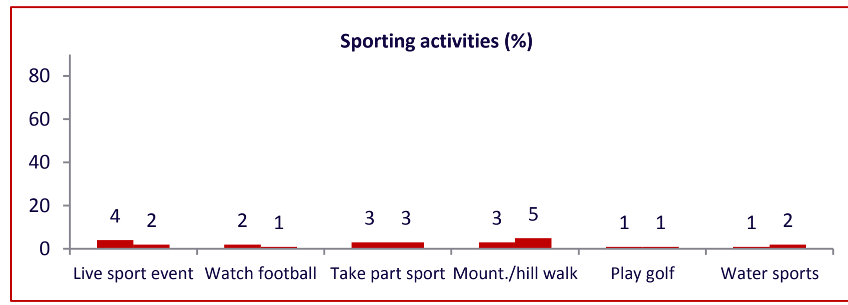
Source: IPS 2010-2014

N.B. Left hand bars represent ‘All markets’, right hand bars represent visitors from Germany









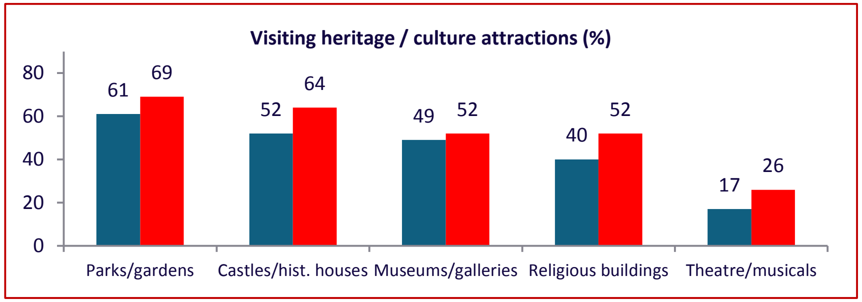
Although slightly less likely to visit museums/galleries than inbound markets to England overall, visitors from Germany are much more likely to visit castles/historic houses and religious buildings. They are also much more likely to visit the coast and to a lesser extent, the countryside / villages and national parks.

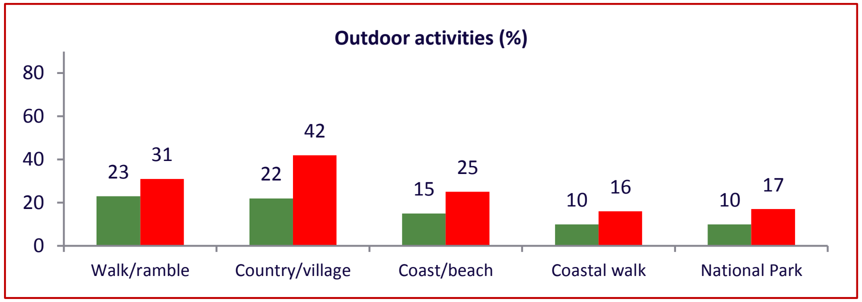
Although still popular, visitors from Germany are no more likely than visitors from other markets to go shopping or go to the pub and are slightly less likely to go to bars/nightclubs or attend sports events.

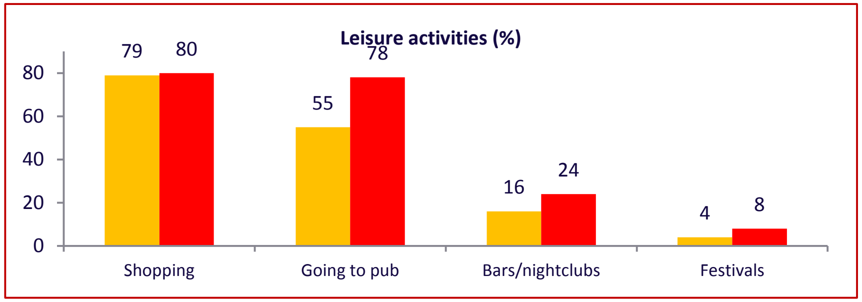
Activity participation by source market / Australia

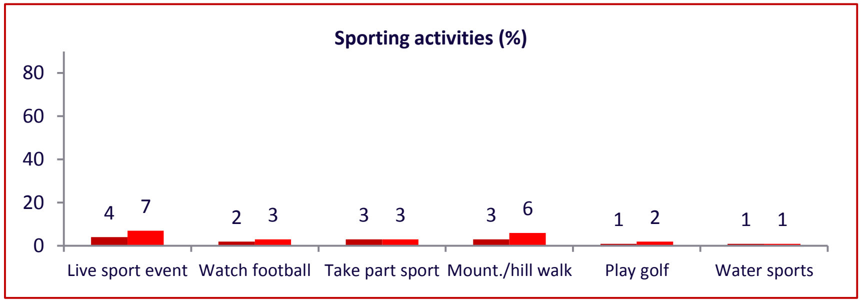
Source: IPS 2010-2014

N.B. Left hand bars represent ‘All markets’, right hand bars represent visitors from Australia









As a long haul source market with longer stays in England and more opportunity to take part in a range of activities, visitors from Australia have a corresponding stronger propensity to take part in most activities while on holiday in England.

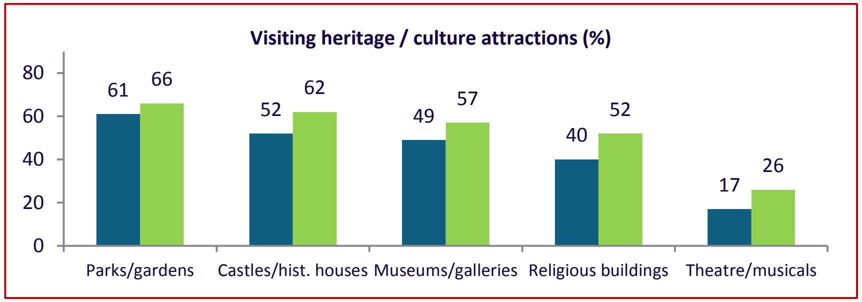
Notwithstanding this, visitors from Australia were still much more likely than other inbound visitors to England to undertake leisure activities such as visiting pubs, nightclubs/bars and attending festivals.

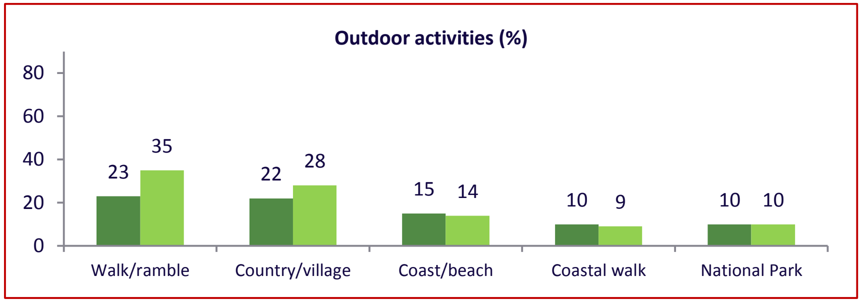
In terms of outdoor activities, visitors from Australia were particularly likely to visit the countryside/villages. Culturally, they were especially more likely to visit castles/historic houses or religious buildings and go to the theatre/musicals, but not significantly more likely to visit museums/galleries.

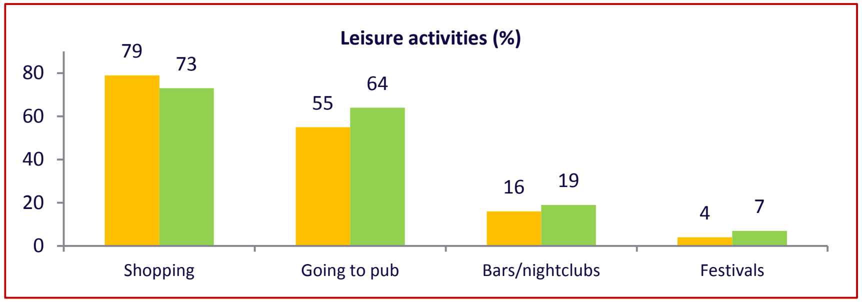
Activity participation by source market / USA

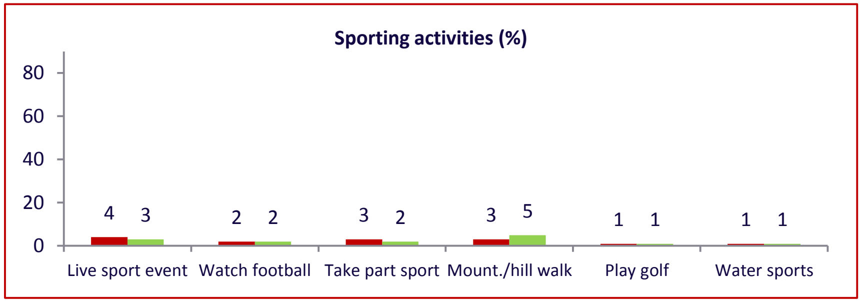
Source: IPS 2010-2014

N.B. Left hand bars represent 'All markets', right hand bars represent visitors from USA









As a long haul source market with longer stays in England and more opportunity to take part in a range of activities, visitors from USA also have a corresponding stronger propensity to take part in most activities while on holiday in England.

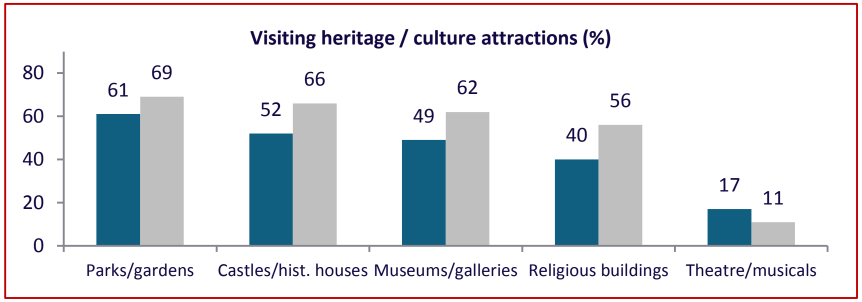
However, there are some activities which visitors from the USA are less likely to participate in – shopping, visiting the coast and watching/taking part in sport.

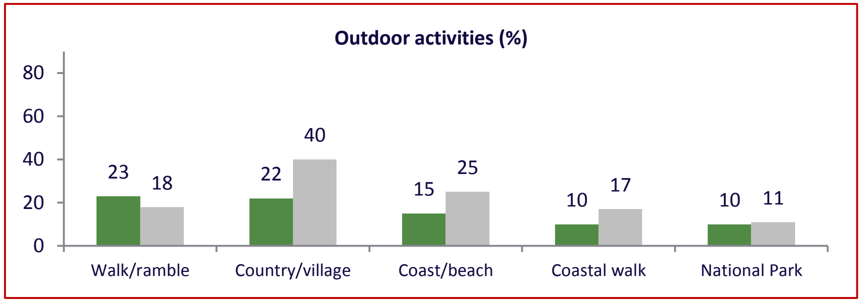
Visitors from the USA were particularly likely to take part in cultural activities such as visiting castles/historic houses, museums/galleries and especially religious buildings. They are also more likely to be theatre/musical goers.

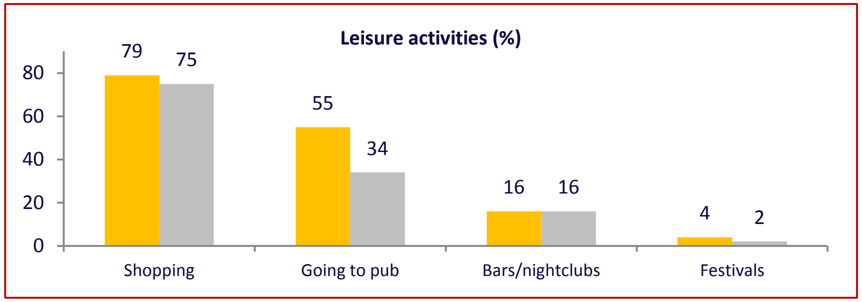
Activity participation by source market / China

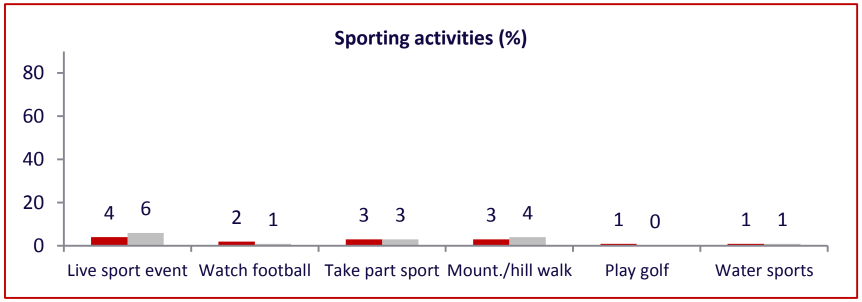
Source: IPS 2010-2014

N.B. Left hand bars represent 'All markets', right hand bars represent visitors from China









As a long haul source market with longer stays in England and more opportunity to take part in a range of activities, visitors from China also have a corresponding stronger propensity to take part in most activities while on holiday in England. However, there are some activities which visitors from China are less likely to participate in – going to the theatre and in particular, going to pubs.

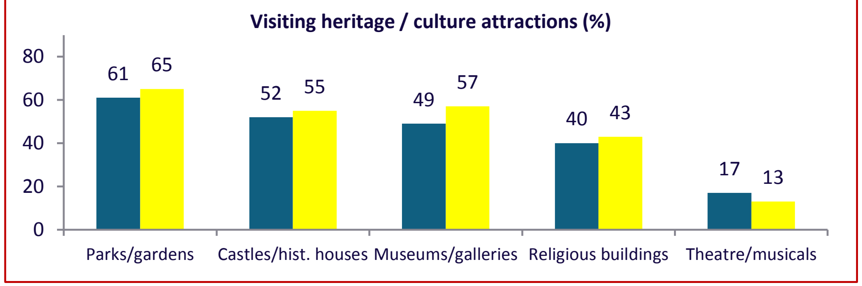
Culture and heritage activities are high on the agenda of visitors from China, especially religious buildings, castles/historic houses and museums/galleries.

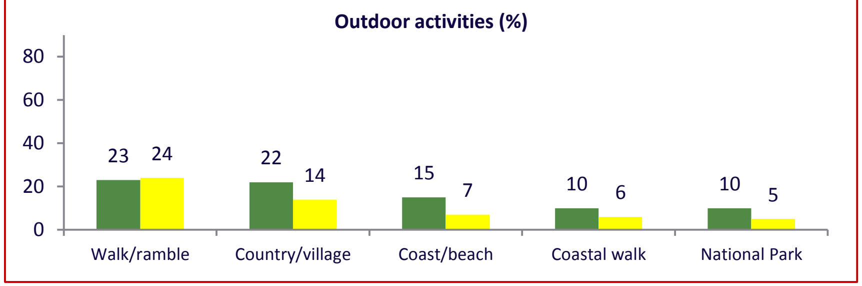
Although walking/rambling is less popular, visitors from China do tend to be more likely to visit the countryside and coast.

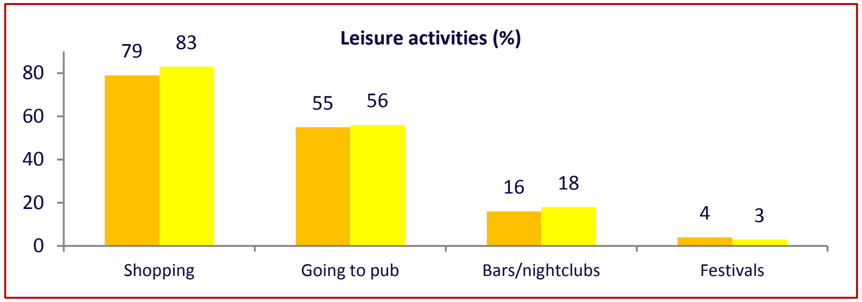
Activity participation by source market / Spain

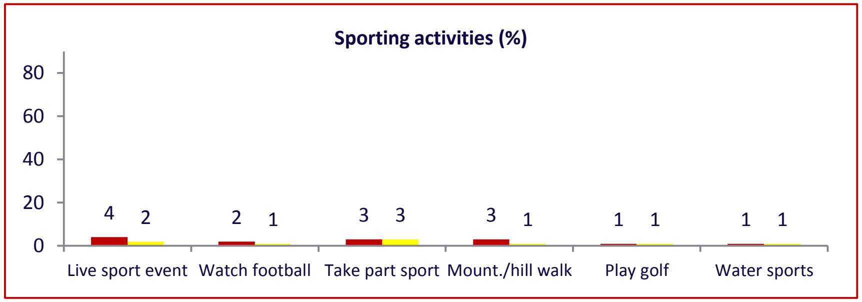
Source: IPS 2010-2014

N.B. Left hand bars represent 'All markets', right hand bars represent visitors from Spain









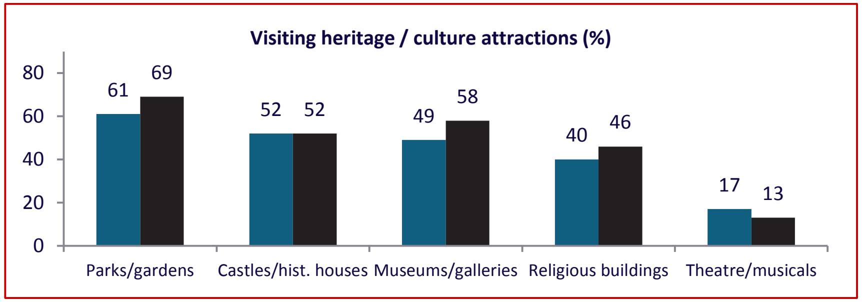
The focus of visitors from Spain tends to be cultural activities, being more likely to visit each of parks/gardens, castles/historic houses, museums/galleries and religious buildings. They are also likely to be keen shoppers, 83% having been shopping on their visit. They are less likely to be theatre/musical goers.

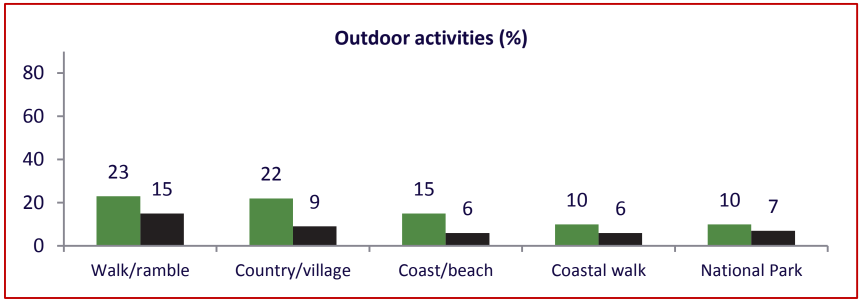
Conversely, visitors from Spain are much less likely to visit coastal and rural destinations during their visit.

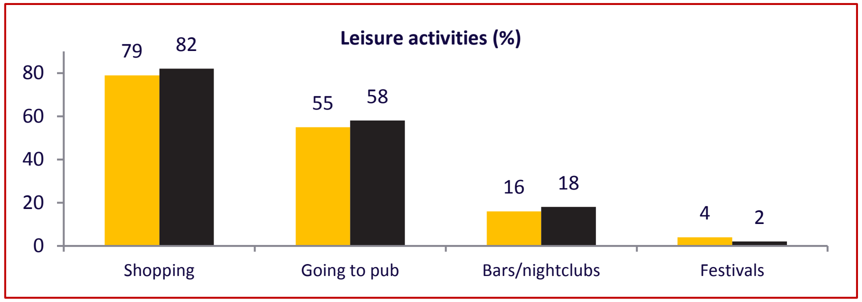
Activity participation by source market / Italy

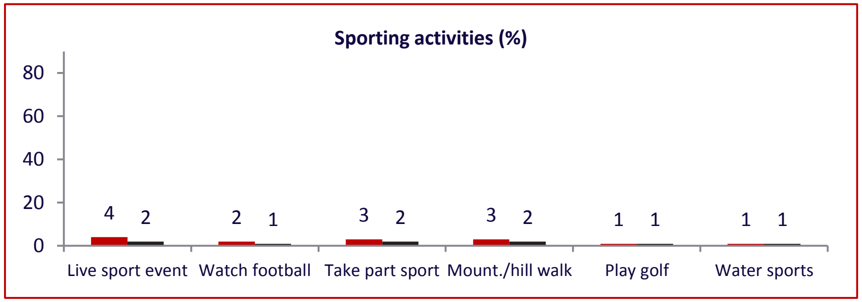
Source: IPS 2010-2014

N.B. Left hand bars represent ‘All markets’, right hand bars represent visitors from Italy









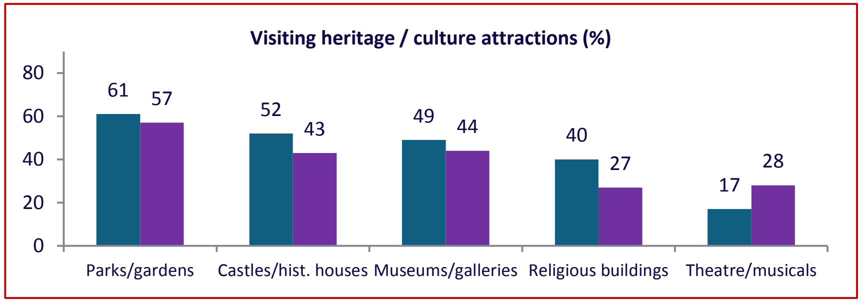
Visitors from Italy tend to be more likely to visit cultural attractions than inbound visitors to England overall, especially museums/galleries and religious buildings. However, they are less likely to be theatre/musical goers.

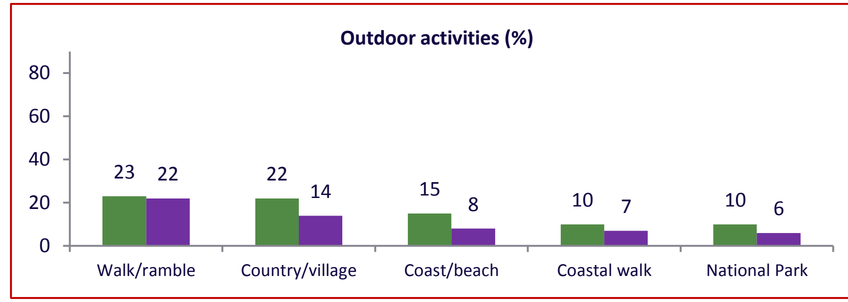
Visitors from Italy are also slightly more likely to take part in leisure activities – shopping, visiting pubs and bars/nightclubs.

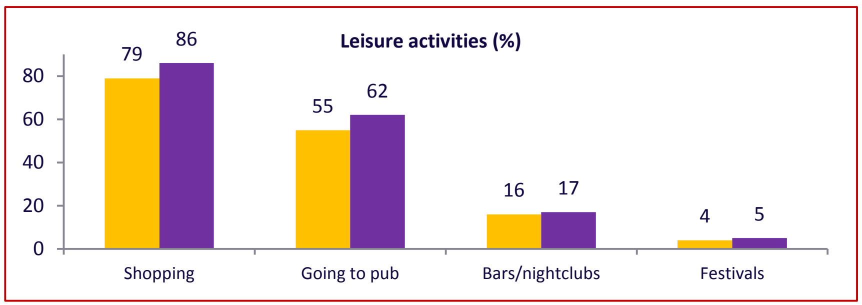
Conversely, outdoor activities are much less popular, visitors from Italy being much less likely to visit coast or countryside or take a walk/ramble.

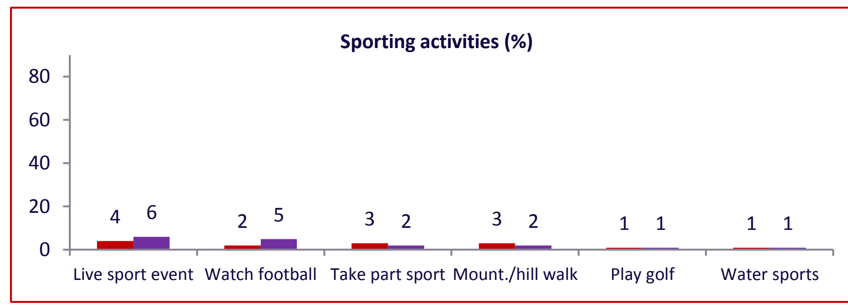
Activity participation by source market / Nordics

Source: IPS 2010-2014 N.B. Left hand bars represent 'All markets', right hand bars represent visitors from Nordics









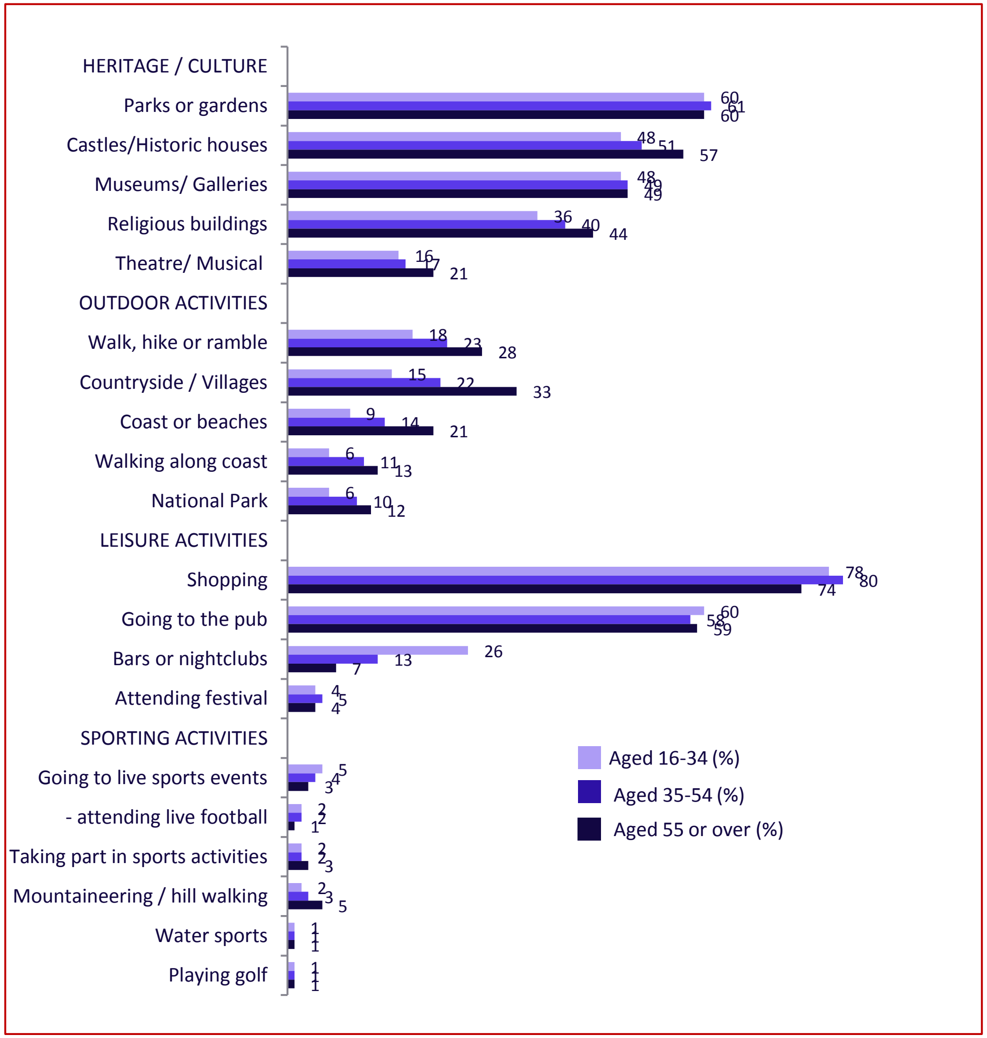
Visitors from the Nordic countries (Norway, Sweden, Finland, Denmark and Iceland) are more likely than visitors from other inbound markets to be event driven. They are more likely to visit the theatre/musicals, attend live sporting events (including football) and attend festivals.

Visitors from the Nordics are also much more likely to go shopping during their visit and go to a pub.

Conversely, cultural attractions tend to be lower on their agenda as are outdoor activities such as visiting the coast or countryside.

Participation in activities on holiday – by age group

Source: IPS 2010, 2011, 2014



The chart shows how the likelihood of participation in activities on a holiday in England varies by age.

Although those from older age groups are much less likely to take a range of different types of holiday in the past 3-5 years, on any given holiday in England their participation in different activities is as wide, if not wider, than those from younger age groups. This reflects the longer average length of stay of those from older age groups - those aged 55 or over tend to be more likely to participate in most activities.

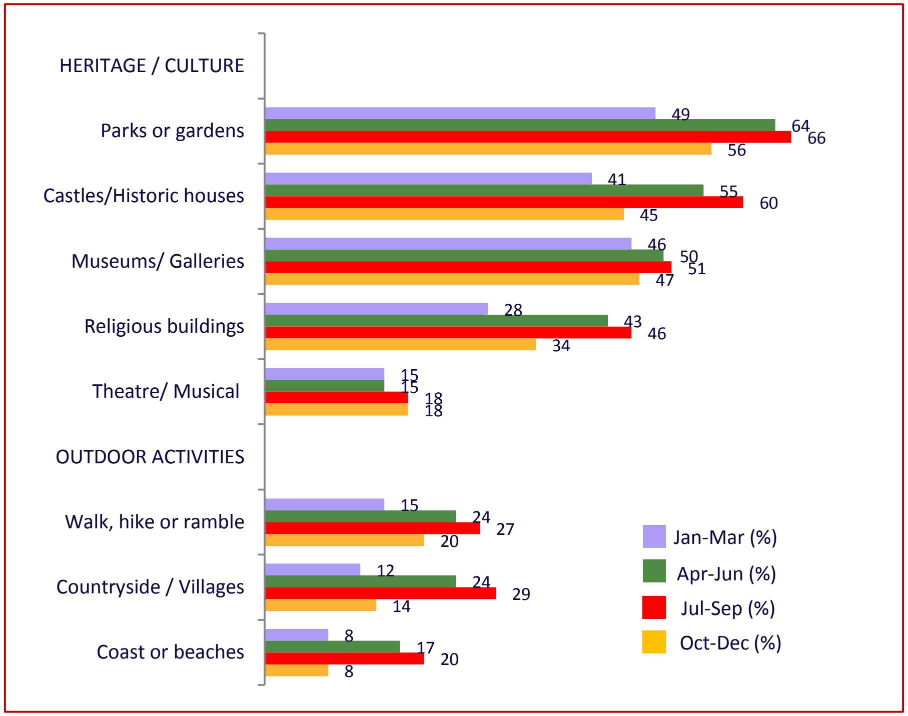
In particular, as age increases, so does likelihood of participating in most heritage/culture activities (with the exception of parks/gardens) and outdoor activities – especially visiting the coast or countryside/villages.

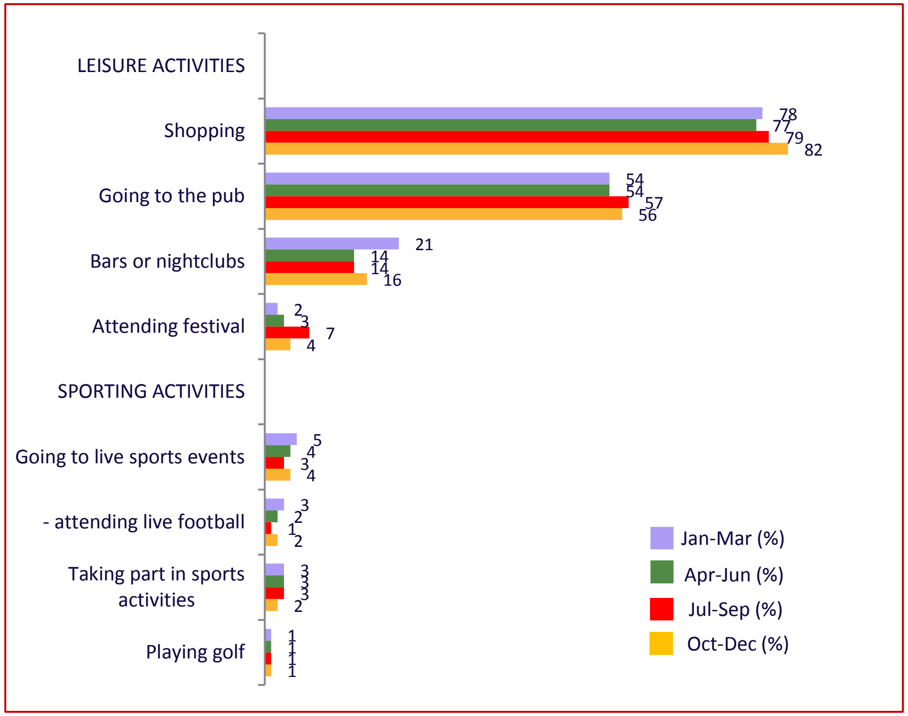
Conversely, leisure activities tend to be as likely to be participated in by younger as older age groups – going shopping and visiting the pub. Indeed, bars/nightclubs are much more likely to be frequented by the 16-34 year olds.

Sports activities are also as likely to be the domain of the young as the old.

Participation in activities on holiday – by season of visit

Source: IPS 2010, 2011, 2014



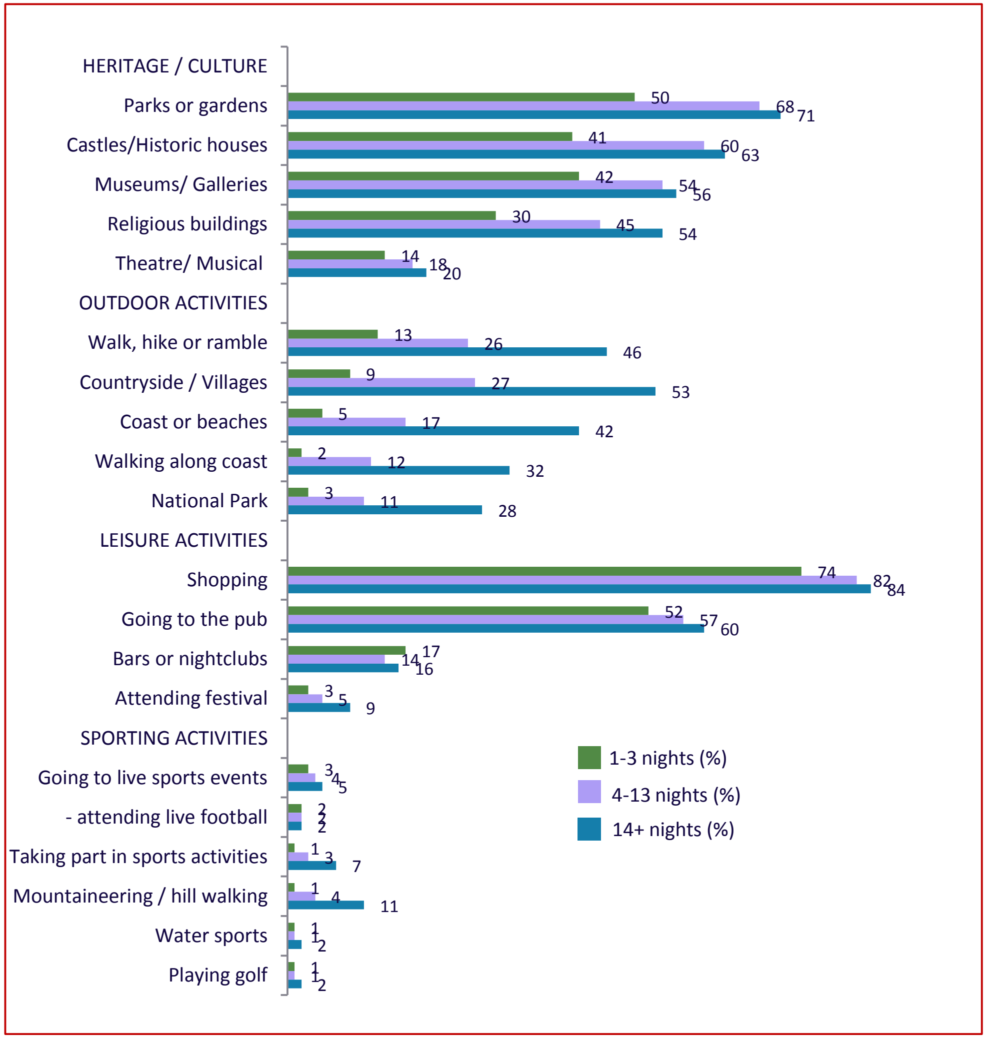


The chart shows how likelihood of participation in activities in England varies by season of visit. For most leisure and sport activities there is little seasonal difference. Festival going is slightly more likely during July-September and visiting bars/nightclubs during the January-March period.

For both heritage/culture activities and outdoor activities, participation tends to be highest in the July-September period, closely followed by the April-June period. This tends to be less the case for museums/galleries visiting and going to the theatre/musicals, where participation is more evenly spread throughout the year.

Participation in activities on holiday – by length of stay

Source: IPS 2010, 2011, 2014



The chart shows how the likelihood of participation in activities in England increases as length of stay becomes longer. For some activities, participation is almost as likely on a short break as a longer holiday – shopping, going to the theatre/musical, going to the pub, going to a nightclub/bar or attending sports events.

For other activities, participation only becomes significant among those who are staying for more than two weeks – in particular the outdoor activities, so visiting the coast, countryside/villages, national parks or walking/hiking.

For most of the heritage / culture activities, participation picks up among those staying between 4-13 nights and does not increase significantly among those staying longer than this.

How well do we deliver these activities?

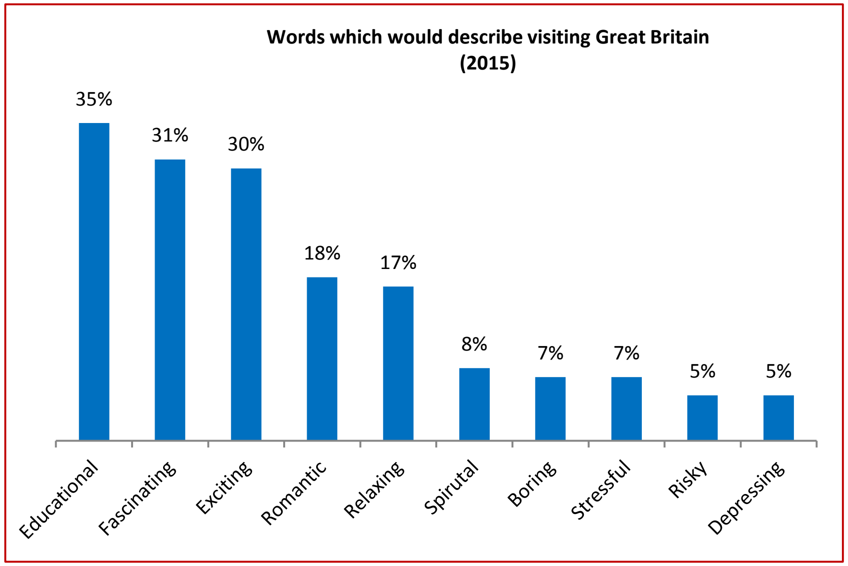
Data based on a combination of Anholt GfK Nations Brand Index (2013 and 2014) and BDRC Continental's Global Tourism Monitor (2015)

Overseas visitor perceptions of the UK

Source: GfK Anholt Nations Brand Index, 2015

UK Rankings for Tourism Attributes, 2008- 2015								
	2008	2009	2010	2011	2012	2013	2014	2015
Tourism (overall)	4	5	5	4	4	4	3	4
Is rich in historic buildings and monuments	4	4	4	4	5	5	5	5
Has a vibrant city life	4	4	4	4	4	4	4	4
Would like to visit if money was no object	7	8	8	6	6	6	5	6
Is rich in natural beauty	23	24	22	22	22	20	20	18

Source: GfK Anholt Nations Brand Index, 2015



By way of introduction as to how well activities are perceived to be delivered by England, we can look at the GfK Anholt Nations Brand Index survey. This asks 20,000 consumers across 20 countries to score 50 nations on an array of attributes including tourism, culture and welcome, exports, governance and immigration/investment. The scores given across all these attributes are combined to calculate an overall 'Nation Brand' index.

In 2015, the UK was ranked 4th for tourism, a strong position it has broadly held for a number of years. In terms of activity delivery, the UK's highest attribute rankings were for contemporary culture and vibrant city life. It also scored very highly for being rich in historic buildings and monuments.

The UK is less well regarded for being 'rich in natural beauty', an attribute for which it is ranked 18th. Despite the lower ranking, perceptions of the UK's natural offer are improving - the 2015 ranking was the highest to date, and represents a gradual improvement in recent years.

Potential motivations for taking a SHORT BREAK in England

Source: BDRC Continental Global Tourism Intentions Monitor 2015

	ANY REASON		MOST IMPORTANT REASON	
	England	All World Destinations	England	All World Destinations
ANY SIGHTSEEING	**69%**	**60%**	**40%**	**35%**
See main tourist sights /places of interest	48%	38%	27%	18%
Experience scenery / natural beauty	30%	37%	9%	13%
See less well known sights / places of interest	25%	22%	5%	5%
ANY ACTIVITY / EXPERIENCES	**72%**	**70%**	**37%**	**38%**
Experience the local culture	40%	33%	10%	9%
Experience or learn something new	30%	25%	7%	7%
Go shopping	27%	21%	7%	6%
Experience some adventure or thrill	13%	15%	4%	3%
Go to a specific event	13%	10%	4%	2%
Improve physical fitness / body	7%	10%	3%	4%
Taste the local cuisine	19%	29%	1%	4%
Take part in hobby	9%	10%	-	2%
ANY PEOPLE	**37%**	**26%**	**16%**	**8%**
Meet new people	20%	15%	12%	7%
Visit friends/ relatives	22%	14%	4%	2%
ANY REST / RELAXATION	**30%**	**47%**	**6%**	**17%**
Rest mind or body	19%	28%	4%	7%
Do as little as possible	10%	13%	1%	2%
Visit beaches / coastal areas	11%	21%	-	5%
Guaranteed sun / good weather	8%	16%	-	3%

Delivery of activities

In 2015, BDRC Continental conducted a survey of 16,800 interviews across 24 different countries to understand motivations and experience of visiting a wide range of holiday destinations among the general population. England was included as one of the destinations.

The data revealed some interesting trends in perceptions of how well England delivers on a range of activities.

Short breaks to England are more likely than destinations overall to be seen as delivering 'seeing the main sights', reinforcing GB's strong Nations Brand Index rating for 'historic buildings and monuments'. Also scoring higher than average is the appeal of England's local culture and shopping.

Underlining England's ability to deliver an 'active holiday' rather than a relaxing holiday is the lower than average motivation of visiting to 'rest mind or body'.

A holiday to England is also less likely to be perceived as being able to deliver 'scenery/natural beauty', 'tasting local cuisine' or 'visiting beaches/coastal areas'.

Potential motivations for taking a LONGER HOLIDAY in England

Source: BDRC Continental Global Tourism Intentions Monitor 2015

	ANY REASON		MOST IMPORTANT REASON	
	England	All World Destinations	England	All World Destinations
ANY SIGHTSEEING	**69%**	**63%**	**39%**	**34%**
See main tourist sights /places of interest	47%	39%	23%	16%
Experience scenery / natural beauty	41%	41%	10%	13%
See less well known sights / places of interest	26%	24%	7%	4%
ANY ACTIVITY / EXPERIENCES	**72%**	**70%**	**36%**	**35%**
Experience the local culture	41%	37%	9%	9%
Experience or learn something new	28%	28%	2%	4%
Go shopping	23%	19%	5%	4%
Experience some adventure or thrill	15%	17%	3%	4%
Go to a specific event	16%	9%	5%	2%
Improve physical fitness / body	8%	10%	3%	3%
Taste the local cuisine	24%	31%	8%	8%
Take part in hobby	8%	9%	1%	2%
ANY PEOPLE	**42%**	**28%**	**20%**	**9%**
Meet new people	20%	17%	18%	7%
Visit friends/ relatives	28%	15%	2%	1%
ANY REST / RELAXATION	**33%**	**52%**	**5%**	**21%**
Rest mind or body	21%	28%	-	7%
Do as little as possible	12%	13%	1%	2%
Visit beaches / coastal areas	9%	25%	3%	6%
Guaranteed sun / good weather	6%	22%	-	6%

Delivery of activities

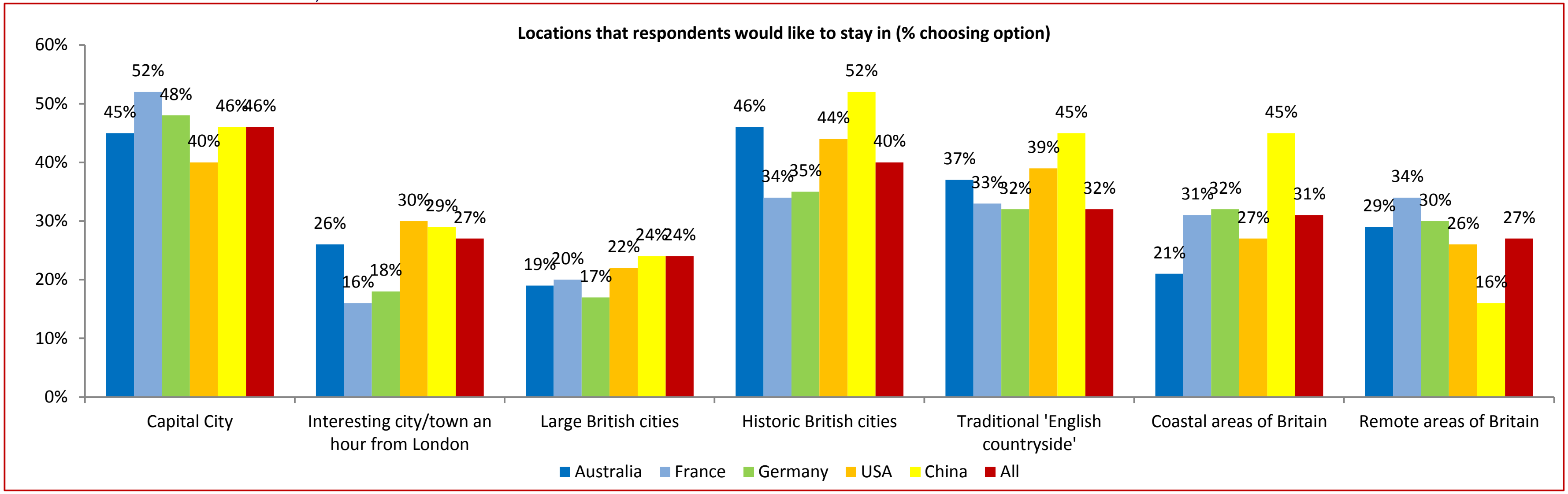
'Seeing the main sights/places of interest' is also a leading perceived feature for longer holidays to England, as is 'experiencing the local culture' and 'shopping'.

'Experiencing scenery/natural beauty' is only marginally weaker than average as a potential motivation for taking a longer holiday to England, reflecting the greater propensity to visit outside London on a longer holiday.

As with short breaks, 'resting mind or body', 'visiting beaches/coastal areas' and 'tasting local cuisine' are lower potential motivations than average.

Locations where overseas markets would like to stay in the UK

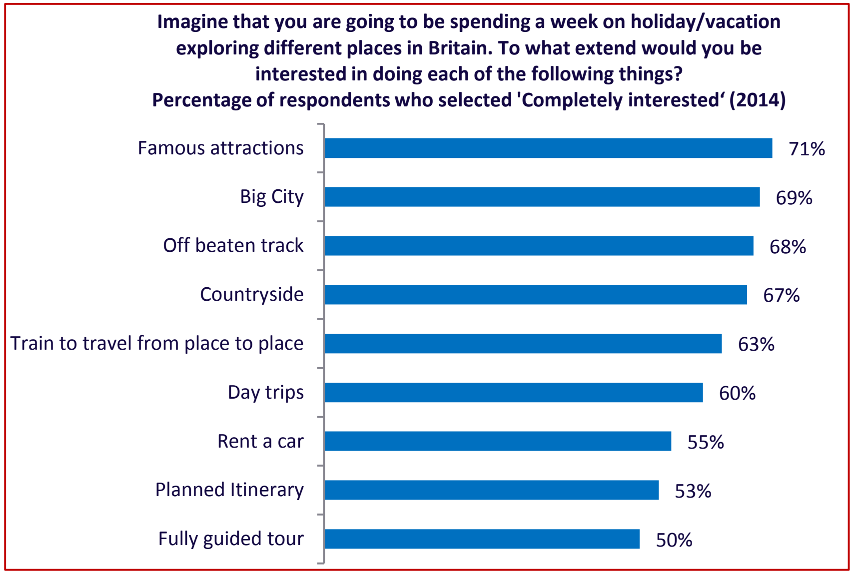
Source: GfK Anholt Nations Brand Index, 2013



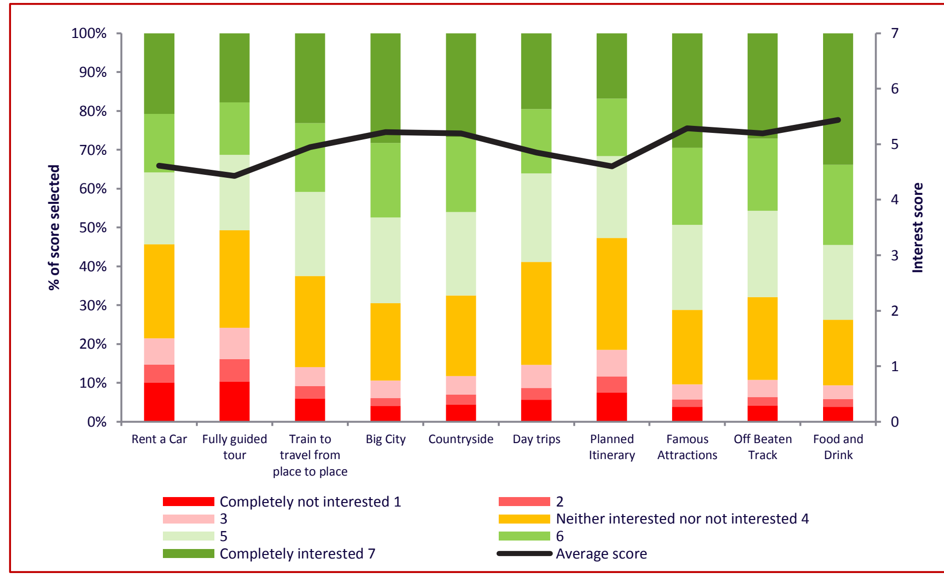
According to the Nations Brand Index, overseas markets are most likely to want to stay in the capital city and historic British cities on a holiday in the UK. Respondents from France are most likely to show a desire to stay in the capital city. The China holiday market is most likely to want to stay in a historic British city, traditional English countryside and coastal areas of Britain pointing to future potential for this market.

Interest in taking part in activities in GB among overseas markets

Source: GfK Anholt Nations Brand Index, 2014



Source: GfK Anholt Nations Brand Index, 2014

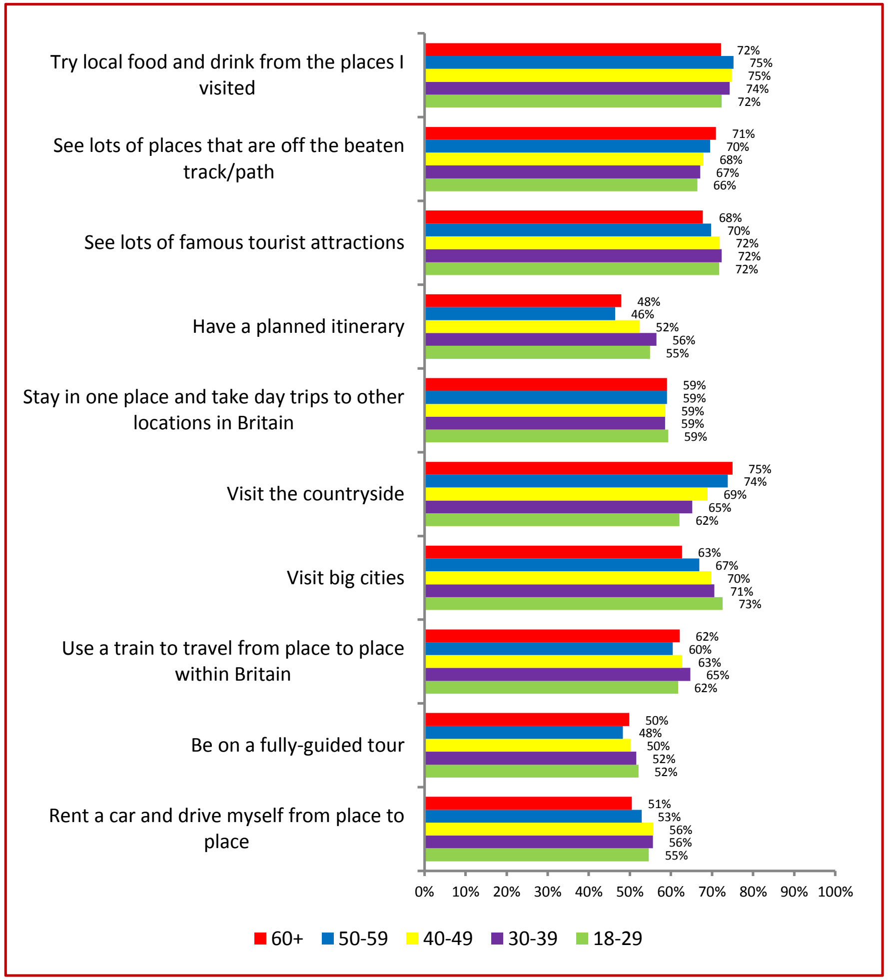


One indicator of how well a nation can deliver on activities is the level of interest in taking part in those activities among potential visitors.

When Nations Brand Index respondents stated how interested they would be in doing a selection of activities on an imagined holiday in the UK, they were most likely to state ‘famous attractions’, ‘big city’ and ‘off beaten track’.

Interest in taking part in activities in GB – by age group

Source: GfK Anholt Nations Brand Index, 2014



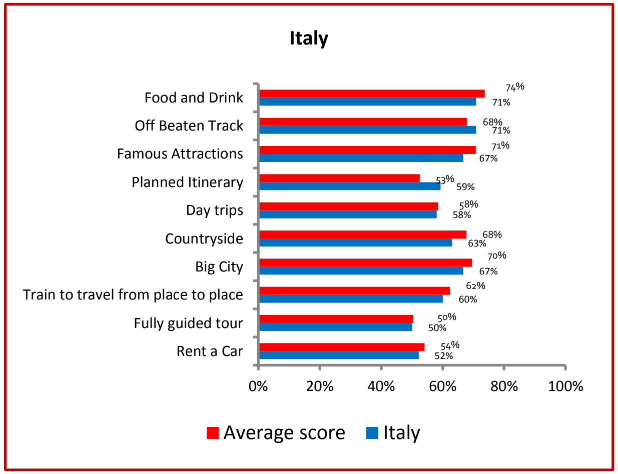
Effect of age is most noticeable when looking at whether potential visitors were more interested in visiting cities or countryside. Older people rated visiting the countryside highest of all statements and were also more interested in seeing places off the beaten track than the younger people.

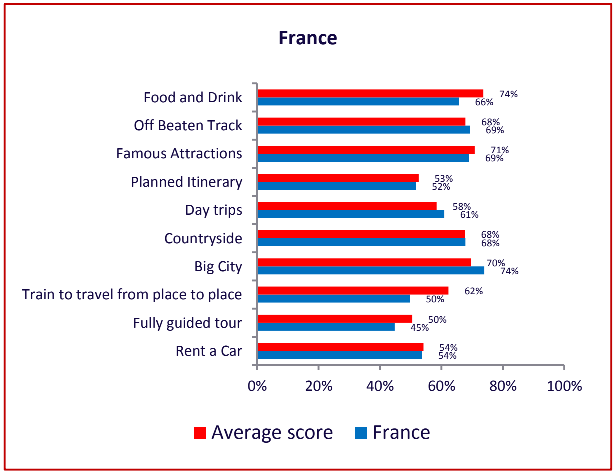
Those under the age of 30 showed most interest towards visiting big cities alongside seeing famous tourist attractions.

Interest in a planned itinerary or fully-guided tour is also stronger among younger potential visitors – those aged under 50 years. Interest in planned itineraries, in particular, drops off quickly after this point.

Interest in taking part in activities in GB - by overseas market / 1

Source: GfK Anholt Nations Brand Index, 2014





With their shorter likely lengths of stay and potentially greater focus around London as the sole destination, those from European markets such as France, Germany and Italy tend to be less likely to be interested in each individual activity.

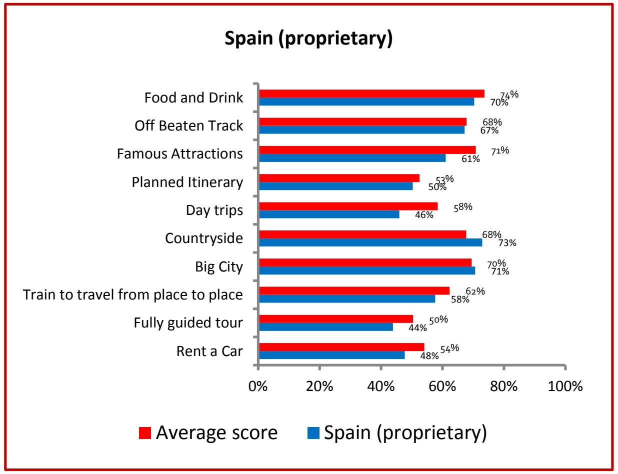
In particular, those from Germany are much less likely to be interested in planned itineraries / guided tours. However, day trips and visiting the countryside are much higher on the agenda.

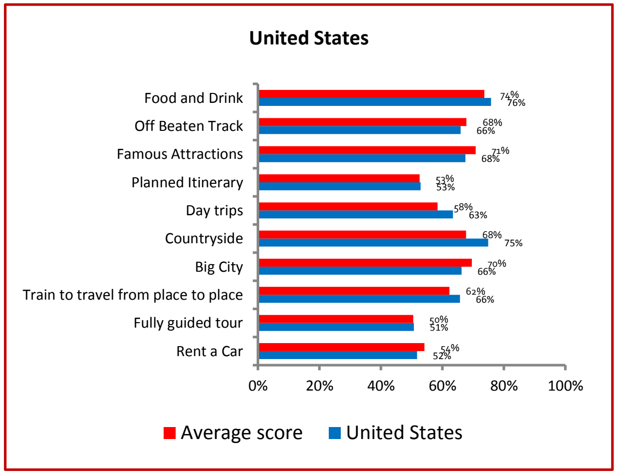
Those from Italy are much more likely to be interested in planned itineraries, guided tours and getting off the beaten track.

Big cities are of much greater interest among those from France, but they also have a desire the get off the beaten track.

Interest in taking part in activities in GB – by overseas market / 2

Source: GfK Anholt Nations Brand Index, 2014





Those from Spain are most likely to be interested in both the big cities and countryside.

With their potentially longer stays, those from Australia and the USA are more likely to be interested in each of the activities. In particular, those from Australia are interested in the countryside, food and drink, famous attractions and renting a car.

Those from the USA are also interested in the countryside, but much more likely to favour train travel over renting a car.

Further information

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