

'At a glance' summaries

How to interpret the results
August 2017

CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND AND INDEXING AGAINST "GLOBAL" TOP 2 BOX SCORES. BOTH COLUMNS SHOW / BASED ON NORMALISED DATA

ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
<p><i>Consideration of <u>activity clusters</u> ranked on definitely would or very likely to consider. Indexing highlights differences vs. the 10-market average. An index score of 100 means the market is on par with this average, an index score above 100 indicates that the cluster is considered more within the market in question ...</i></p>		
Experiencing rural life & scenery	67%	110
Attending cultural / music / sports events	44%	82

... whereas an index score below 100 indicates that the cluster is considered less within the market relative to the "global" average.

MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY ON HOLIDAY TO ENGLAND) AND TOP 2 BOX (SOLE/VERY IMPORTANT REASON) IMPORTANCE OF ACTIVITY VS. CHOSING ENGLAND INDEXED AGAINST AVERAGE IMPORTANCE OF ACTIVITIES

ACTIVITY	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
<p><i>Consideration of <u>activities</u> ranked on definitely would or very likely to consider. The indexing of importance indicates whether a given activity is more or less important as a consideration driver. Here an index score of 100 indicates that the activity is of average importance as a driver of consideration vs. the importance of all activities within the market. Conversely, an index score above 100 indicates that the activity is of above average importance ...</i></p>		
Trying local food & drink specialities	70%	137
Visiting a National Park	52%	85

... and an index score below 100 indicates that the importance of the activity in question is average relative to all activities within the market.

Snapshot summary of the most defining characteristics of the market, typically majoring on skews relative to the 10-market average or calling out key findings relating to consideration of activities / clusters and the importance of the latter in driving consideration of England.

Detailed explanation of indexing and the colour coding applied to index scores to highlight more or less pronounced differences relative to the 10-market average or the in-market average.

The demographics block calls out any major skews in the demographic make up people who have booked an England holiday already, indexing scores within sub-groups against the total for the market.

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

18-34	35-54	55+	Male	Female	AB	C1	C2DE
7%	4%	5%	7%	5%	6%	5%	6%
135	69	85	118	82	105	84	116

MARKET SUMMARY (EXAMPLE)

- Most likely reflecting the older demographic skew, action and outdoor activity clusters are not found majorly appealing, whereas rural life and scenery appeals more
- Aside from the classic drivers (famous places, buildings & historic monuments), the prospect of exploring villages / rural areas and local food / drink specialities have the greatest impact on consideration of England
- As a driver contemporary culture punches about its weight, but in terms of consideration, this isn't a key activity

INDEXING

Indexing shows relative differences, e.g. against the global average or the average importance of activities. An index score of 120 next to a 60% score indicates a global average of 50% as does an index score of 80 next to a 40% score.

COLOUR CODING OF INDEX SCORES

Index scores have been colour coded to highlight smaller or greater differences. ■=strong under-indexing (index <80), ■=moderate under-indexing (index 80-89), ■=moderate over-indexing (index 110-119) and ■=strong over-indexing (index 120+)

SOURCE

Online survey of 1,640 respondents. Fieldwork carried out between [02.17] and [03.17].

IMPORTANT FACTORS WHEN TAKING HOLIDAYS GENERALLY & ENGLAND DELIVERY AGAINST THESE

TOP 2 BOX IMPORTANCE (VERY IMPORTANT / EXTREMELY IMPORTANT) GENERALLY, AND INDEXED AGAINST GLOBAL IMPORTANCE, COMPARED TO TOP 2 BOX ENGLAND DELIVERY AGAINST THIS (SCORED 6 OR 7 WHERE 7 MEANS ENGLAND IS A REALLY GREAT PLACE FOR THIS)

IMPORTANT WHEN TAKING HOLS	DEFINITELY / VERY LIKELY GENERALLY	INDEX VS GLOBAL	DEFINITELY / VERY LIKELY ENGLAND	DIFF VS GENERALLY
Enjoying the natural world / scenery	77%	108	53%	-24%

Comparison of important factors when it comes to choosing a destination generally and England specifically. Expressed in terms of extremely important or very important and indexed vs. the “global”, 10-market average to highlight instances where a factor or “need” is more or less important in the market relative to the 10-market average. The difference – expressed in percentage points – between what’s important generally and when it comes to choosing England draws attention to areas where England suffers from a “capabilities gap” vs. areas where England is in a position of relative strength.

Consideration of locations indicates preferences for London vs. other England locations. Scores indexed to highlight differences vs. the 10-market average...

LOCATIONS CONSIDERED IN ENGLAND		INDEX VS GLOBAL
London	84%	103
Coastal or beach locations	71%	116
Modern towns and cities (i.e. outside London)	41%	81

... meaning that an index over 100 indicates a stronger preference for that location relative to the “global”, 10-market average (and vice versa).

QUALITATIVE SUMMARY

Additional observations from supplementary qualitative interviews conducted as part of this research programme

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Market level data
August 2017



69%

NET England consideration

ATTITUDE TOWARDS TAKING A HOLIDAY TO ENGLAND IN FUTURE



CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

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ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
Visiting famous / iconic attractions / places	88%	108
Experiencing city life	76%	107
Exploring history and heritage	75%	100
Experiencing rural life & scenery	67%	110
Attending cultural / music / sports events	44%	82
Outdoor leisure pursuits	41%	72
Challenge and / or action	21%	67

Parks/gardens, short walks & museums are widely considered, but their impact as drivers of visitation are average. Villages/rural areas punch above their weight

MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY ON HOLIDAY TO ENGLAND) AND TOP 2 BOX (SOLE/VERY IMPORTANT REASON) IMPORTANCE OF ACTIVITY VS. CHOSING ENGLAND INDEXED AGAINST AVERAGE IMPORTANCE OF ACTIVITIES

ACTIVITY (1-10 of 40)	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
Seeing world famous or iconic places	82%	197
Visiting a castle/palace/historic house	79%	149
Visiting a historic monument	75%	137
Visiting a park/garden	74%	105
Trying local food & drink specialities	70%	137
Short (< 2hrs) country or coastal walk	69%	104
Visiting a museum	56%	106
Exploring villages / rural areas	54%	131
Visiting a National Park	52%	85
Event associated with local traditions	52%	101

List continues overleaf ...





MOST CONSIDERED ACTIVITIES ON HOLIDAY TO ENGLAND AND IMPORTANCE VS. CHOOSING ENGLAND

ACTIVITY (11-20 of 40)	DEFINITELY / VERY LIKELY	INDEX IMPORTANCE
Long (> ½ day) country or coastal walk	46%	109
Experiencing local nightlife	46%	101
Visiting a religious building	43%	91
Shopping for locally made products/craft	43%	93
Having a gourmet meal	41%	86
Food & drink tour or attraction	39%	99
Shopping for clothes	39%	95
Film/TV/Literature attraction	39%	96
Watching a play / musical	37%	81
Visiting contemporary culture attraction	36%	111

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

18-34	35-54	55+	Male	Female	AB	C1	C2DE
25%	17%	8%	18%	13%	20%	14%	19%
159	106	51	114	83	123	89	117

MARKET SUMMARY

- Action and outdoor activity clusters are not found majorly appealing, whereas rural life and scenery appeal more
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Enjoying the natural world / scenery	77%	108	53%	-24%
Learning more about the destination / country	77%	115	64%	-13%
Seeing the most famous sights ...	70%	105	73%	+2%
Experiencing local culture	66%	104	58%	-7%
Rest and relaxation	64%	104	35%	-30%
Learning about history and heritage	61%	104	66%	+5%
Treating / spoiling yourself / others	60%	106	33%	-27%
Fun for all the family	51%	90	33%	-18%
Meeting new people	35%	97	50%	+15%
Helping the local community / environment	24%	98	40%	+16%
Achieving something challenging	19%	77	37%	+18%
Thrill and excitement from activities / sports	17%	61	30%	+14%
Partying	11%	53	45%	+34%

BEEN TO ENGLAND IN PAST 3 YEARS INDEXED AGAINST GLOBAL

28%
Index 66

LOCATIONS CONSIDERED IN ENGLAND	INDEX VS GLOBAL
London	103
Coastal or beach locations	116
Historic towns and cities (i.e. outside London)	93
Countryside / villages	92
Modern towns and cities (i.e. outside London)	81

QUAL SUMMARY

- Very sophisticated travel market – often with detailed and extensive experience of visiting England and of particular areas and attractions
- Open to getting beyond the cliché – greater familiarity with the country and confidence about visiting means they're a little more open to considering things not on the 'tourist trail'
- Happy to drive – interested in renting even if flown, so less concerned about public transport links and less likely to be influenced by them
- Tend to think of Brits as exotic – one of the most able to find exotic in the mundane (and laugh at it!)
- Get excited about the outdoors and the history

