'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
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 …		
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
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 …		
Trying local food & drink specialities	70%	137 ▼
… and an index score below 100 indicates that the importance of the activity in question is average relative to all activities within the market.		
Visiting a National Park	52%	85 ▼

List continues overleaf …

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.

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].

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

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

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

| Modern towns and cities (i.e. outside London)	41%	81

QUALITATIVE SUMMARY

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

'At a glance' summaries

Market level data

August 2017

ATTITUDE TOWARDS TAKING A HOLIDAY TO ENGLAND IN FUTURE

16%	48%	33%
Would definitely consider	Actively considering	England holiday already booked

96%
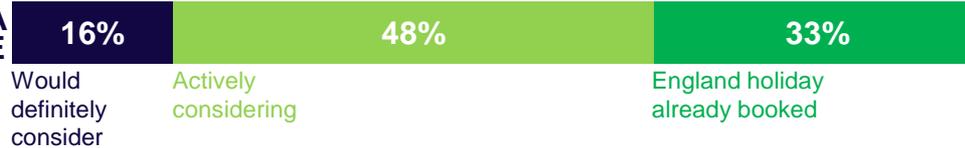
NET England consideration

CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

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ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
Visiting famous / iconic attractions / places	75%	92
Experiencing rural life & scenery	74%	122
Exploring history and heritage	71%	95
Outdoor leisure pursuits	64%	112
Experiencing city life	60%	84
Attending cultural / music / sports events	50%	92
Challenge and / or action	31%	99

Gourmet meals (like parks/garden visits) play lesser roles in driving visitation, whereas long country or coastal walks are punching above their weight in this sense ◀

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	72%	158
Visiting a castle/palace/historic house	72%	122
Exploring villages / rural areas	68%	128
Short (< 2hrs) country or coastal walk	68%	115
Visiting a historic monument	68%	114
Trying local food & drink specialities	68%	126
Visiting a National Park	66%	98
Visiting a park/garden	65%	86
Having a gourmet meal	58%	88
Long (> half day) country or coastal walk	58%	137

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
Visiting a museum	57%	84
Food & drink tour or attraction	52%	91
Visiting places linked to family history	51%	93
Event associated with local traditions	45%	84
Shopping for locally made products/craft	45%	73
Shopping for clothes	43%	80
Visiting contemporary culture attraction	42%	121
Boating (boat trips, canal boating)	42%	72
Film/TV/Literature attraction	42%	80
Visiting an art gallery	42%	80

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

18-34	35-54	55+	Male	Female	AB	C1	C2DE
31%	32%	35%	32%	33%	33%	32%	33%
95	97	106	98	102	101	98	102

MARKET SUMMARY

- Lower appeal of the city life activity cluster, whereas rural life & scenery is widely considered and exploration of villages / rural areas is an above average driver of consideration at an activity level

- Gourmet meals not a particularly key driver, although local food and drink is clearly important (and widely considered)

- Whilst certainly more niche in terms of consideration, contemporary culture has a relatively profound impact on consideration of England

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