

# Discover England Fund Research Outdoor Activities

June 2018



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VisitEngland™

# Background to the project

## This project was run to support the Discover England Fund

### Background

- One Minute to Midnight and Maru completed 2 primary research projects relating to the DEF for VisitEngland in 2017, both qualitative and quantitative. This project builds on that general activities work of Year 1 with a deep-dive extension looking into Outdoor Activities.

### Key Business Objectives

- Provide data & support for DEF bids working in this area
- Understand the most fertile areas for product development in England
- Suggest how best to position the product we have across these markets to make it compelling & believable in marketing communications

### Research Areas

- Activity Groupings//Role of Activities//Trip Repertoires//Drivers & Barriers//Experience//Activity Combinations//Terminology//Market Differences//Regional Awareness//Segment Differences

## Two stages to the research

### QUAL



12 x face to face  
In-Depth  
Interviews,  
Germany

### QUANT



Online Survey  
5 markets  
n=500 per market

### Methodology

- The first stage of research consisted of 12 x qualitative depth interviews with the Germany market
- This was then followed up with an online survey in 5 markets (Germany, France, USA, Netherlands & UK)
- The sample profile for both pieces of research was defined as:
  - *Adult, citizen and lived for 10+ years in market*
  - *Taken an international holiday / domestic trip in past 3 years*
  - *Must not reject a holiday to England*
  - *Must regularly or occasionally do at least 1 activity*
  - *Must have taken part in an outdoor activity on a holiday*

## Activities researched

A core set of outdoor activities were asked about in the research:

- Gentle country walks
- Hill-walking or full day walks
- Mountain Biking
- Road Cycling
- Horse-riding
- Kayaking
- Climbing
- Rafting
- Surfing
- Canyoning
- Windsurfing
- Coasteering



There are a few key ideas that it helps to keep in mind

1

### **Outdoor Activities Appeal**

- The example imagery and suggested activities we showed them were very well-received, and most were interested in trying at least 1 outdoor activity in England on holiday in the future

2

### **But in England?!**

- The big story (for them) was one of surprise that England has this terrain and landscapes on offer – it was significantly surprising to many that England had, for example, the terrain for mountain biking

3

### **Where in England?**

- Regional knowledge was tiny – while they know England and some names of places, they frequently had no idea what the actual place looked like so imagining activity holidays there can be impossible



The Outdoor Activities Audience – Who Are They?



## The Outdoor Activities fan in 6 simple attitudes:

*'they're a way of getting to know the locals'* **68%**

*'I only want to do them when the weather is good'* **62%**

*'I want to push myself as hard as I possibly can'* **46%**



**79%** *'they help me to slow down and relax'*

**70%** *'they give me a real buzz'*

**81%** *'they help me to see places differently'*

## The Outdoor Activities fan appreciates simple things

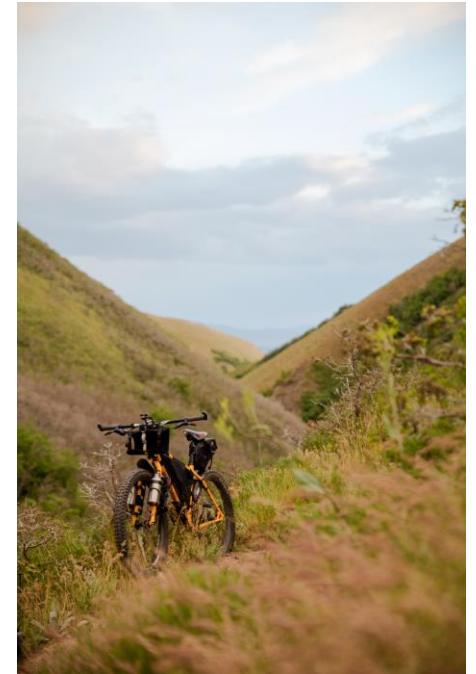
### It's simple - nature and what they can do in it!

#### 1. Vastness

- Die Weite: '*The nothingness; the absence of humans*'
- The raw appeal of nature and the absence of distractions has a special place in their imaginations

#### 2. Movement

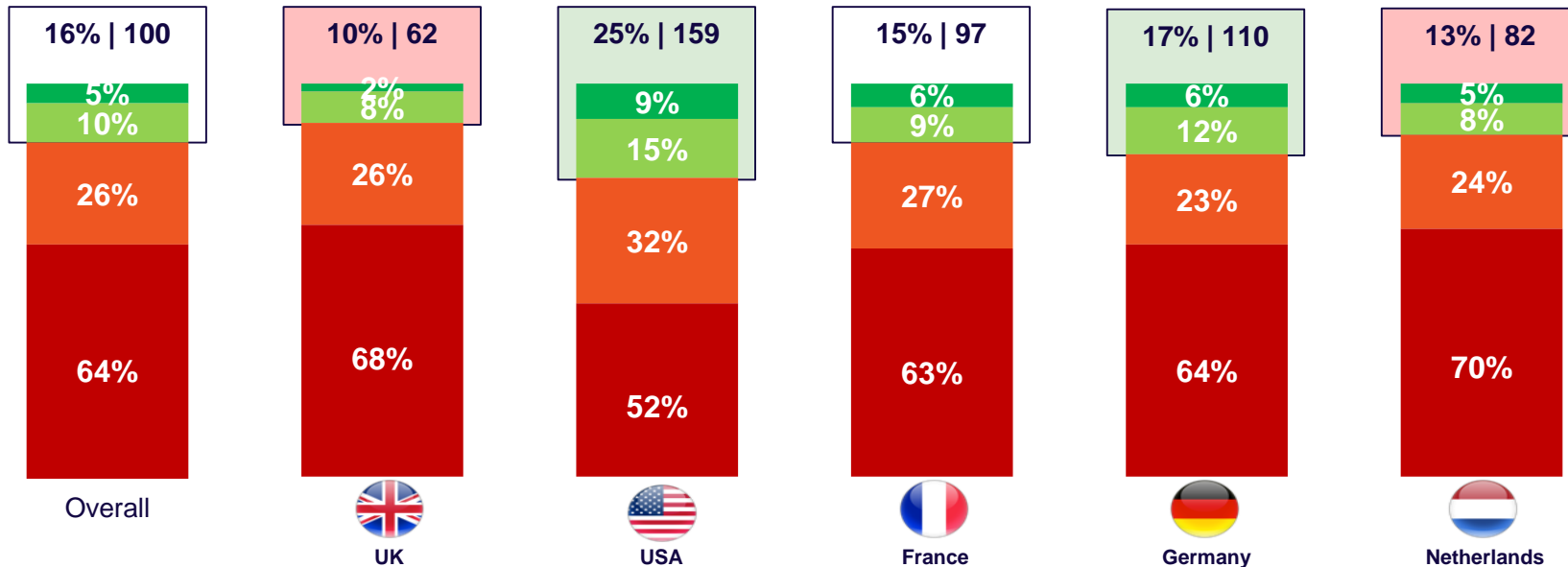
- Bewegung: '*The opposite of being a couch potato*'
- Just the pure pleasure of being active, whether at home or on holiday
- 43% of them fed this need by doing outdoor activities of some sort on their last holiday, while 16% had gone further and tried a Challenge/Action-Filled sports on a holiday



## They apply this 'free spirit' approach to their Outdoor Activity holidays

### INVOLVEMENT OF GUIDES VS DIVISING OF OWN ROUTE FOR ACTIVITIES – ALL P3Y TRIPS INVOLVING ANY ACTIVITY

■ I had a guide all of the time   ■ I had a guide some of the time   ■ I followed a route / set of instructions   ■ I devised my own route

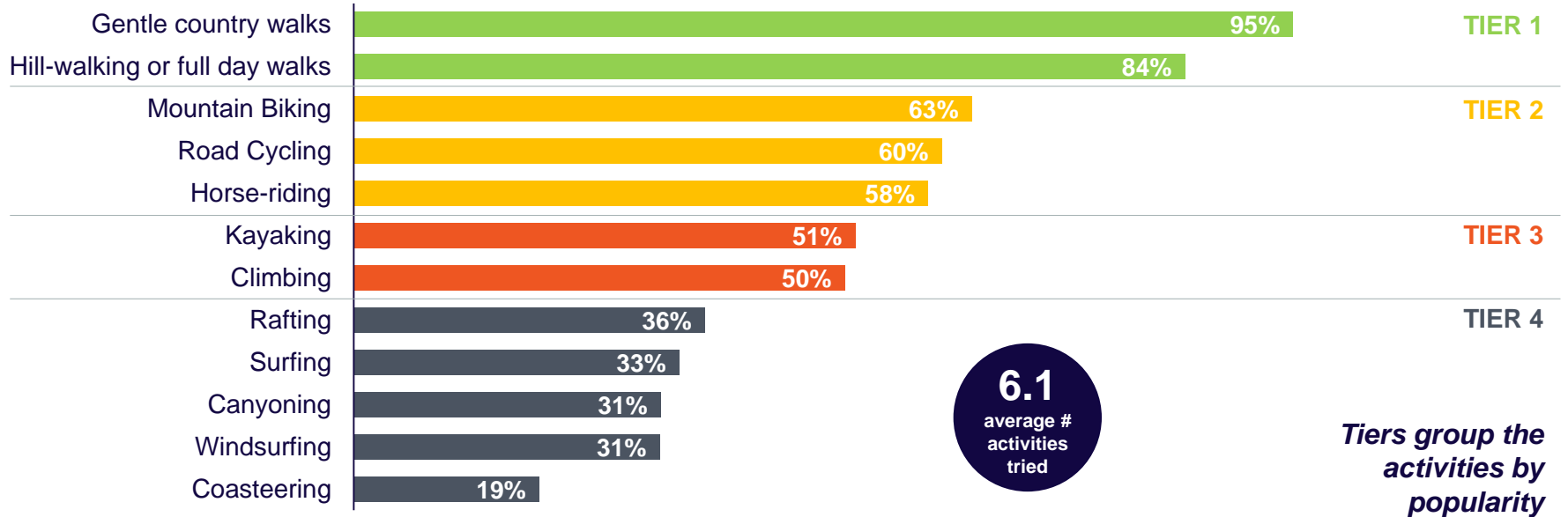


Q25. Were you accompanied by a guide or did you devise your own route for [MAIN ACTIVITY]?

Base: All P3Y trips (n=6191)

Over the years they've usually tried a really broad range of activities, with country walking and hiking the most common

PARTICIPATION IN ACTIVITIES – NET OF TRIED IN THE PAST / SOMETHING I DO NOWADAYS

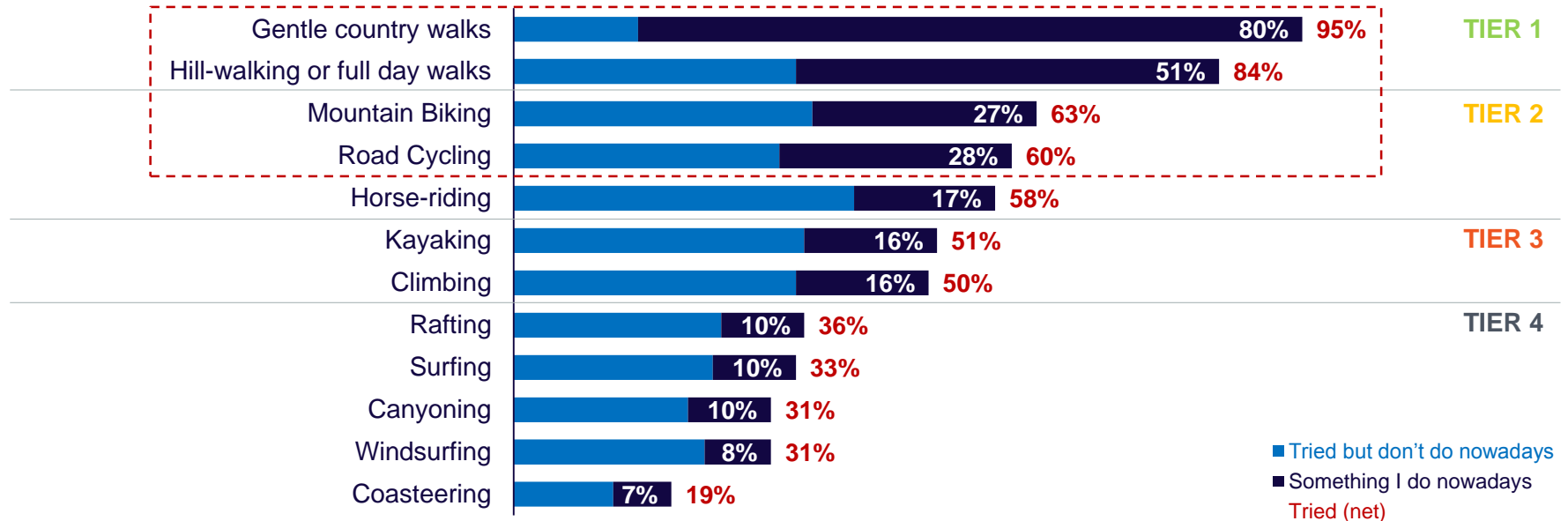


Q8. For each of the following activities, please let us know if you have taken part in these previously?

Base: All respondents (n=2542)

## Walking and cycling dominate the activities they're still doing day-to-day

### PARTICIPATION IN ACTIVITIES – TRIED IN THE PAST / SOMETHING I DO NOWADAYS. CROSS-MARKET DATA



Q8. For each of the following activities, please let us know if you have taken part in these previously?

Base: All respondents (n=2542)

## Many have gone through similar phases of doing more serious activities, and then softer post-children

### Activity holidays can be a time to rediscover activities tried or loved before

- Many seem to go through an intuitive life-stage journey
  - More serious activities pre-children
  - No activities young-children
  - Softer activities post-children
- Family holidays are often a chance to rekindle a love of a particular activity or introduce family to it



*“Depends who you’re talking to – Peter with children or without his children. I have a mountain bike - it was very expensive - but my wife doesn’t like it. I’d love to do this but will maybe need to wait 5 years for my kids to be older so they could do it with me” – Male, Germany*

## Country walks appeal more to an older demographic, whilst the faster paced activities over-index amongst those aged under 44

### ACTIVITIES DONE NOWADAYS BY AGE

Market scores indexed vs. total	Total	18-24	25-34	35-44	45-54	55-64	65-74
Gentle country walks	80%	80	89	99	110	116	115
Hill-walking or full day walks	51%	86	100	104	112	96	78
Road Cycling	28%	93	118	118	86	82	64
Mountain Biking	28%	96	122	130	96	56	33
Horse-riding	17%	129	129	124	94	53	35
Kayaking	16%	144	119	119	81	50	31
Climbing	16%	181	163	106	50	25	19
Surfing	10%	150	140	140	40	30	0
Canyoning	10%	160	160	120	60	40	10
Rafting	10%	150	150	130	60	40	10
Windsurfing	8%	125	150	138	38	25	25
Coasteering	7%	129	157	143	43	14	14

■ >130  
■ >115  
■ <85  
■ <70

Index refers to the difference to total.  
 Green = significantly higher than the total  
 Orange / red = significantly lower

Q8. For each of the following activities, please let us know if you have taken part in these previously?

Base: All respondents (n=2542)

## They might have been hardcore once, but life's caught up with many and holidaying closer to home has its benefits

### They've often got more to think about than holidays

- Many are ex-adrenalin junkies/adventurers who now have a family and less adventurous partners to consider
- 56% of this Outdoor Activity fan audience interested in England have at least one child on the household
- And so there's an extra positive to England straight away for the European audiences – it's close enough to get a family to!

#### KEY IDEA

*In principle, England suits the needs of this slightly 'softer' adventurer well*

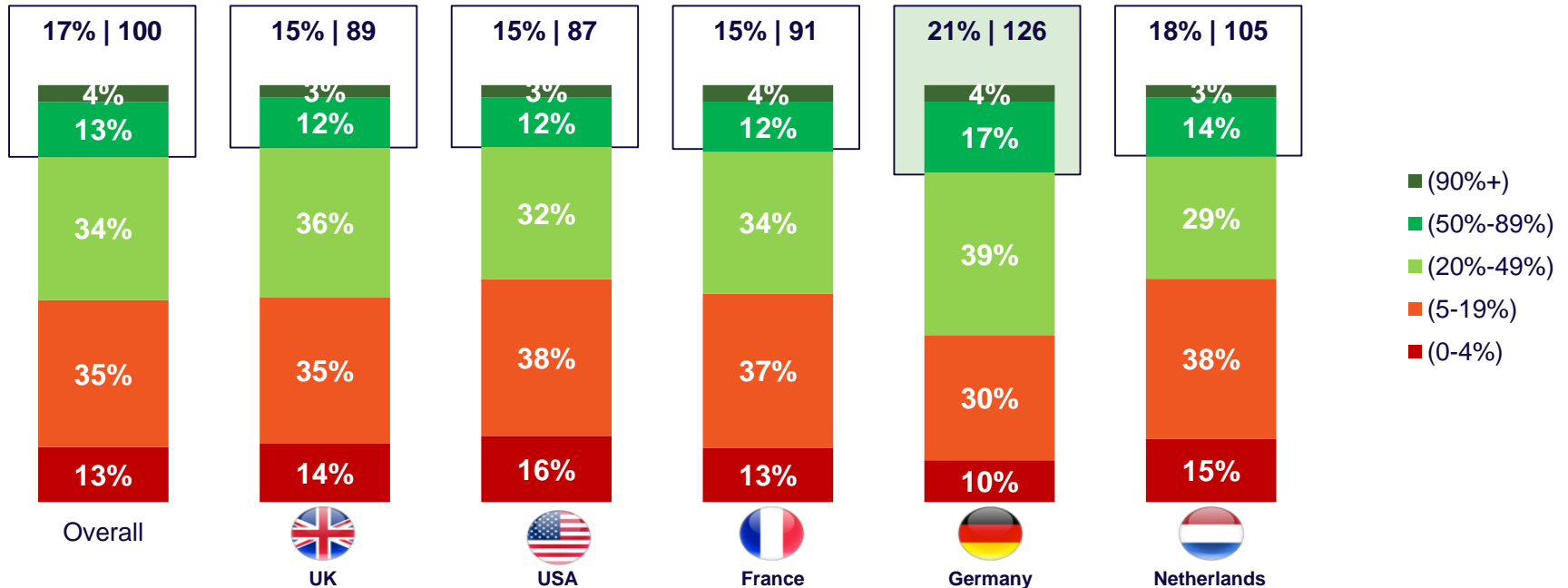


*"In the past I never wanted to do Europe because thought could do it when I was old, but now want to do Europe because can't put baby on flight for 12 hours! It's just important it's not Germany, I want to see the planet I live on. We have a map in the corridor and we put pins in it" – Germany*



# Outdoor Activities can actually be relatively peripheral in terms of time spent

## TIME SPENT ON MAIN ACTIVITY – ALL PAST 3 YEAR TRIPS INVOLVING ANY ACTIVITY

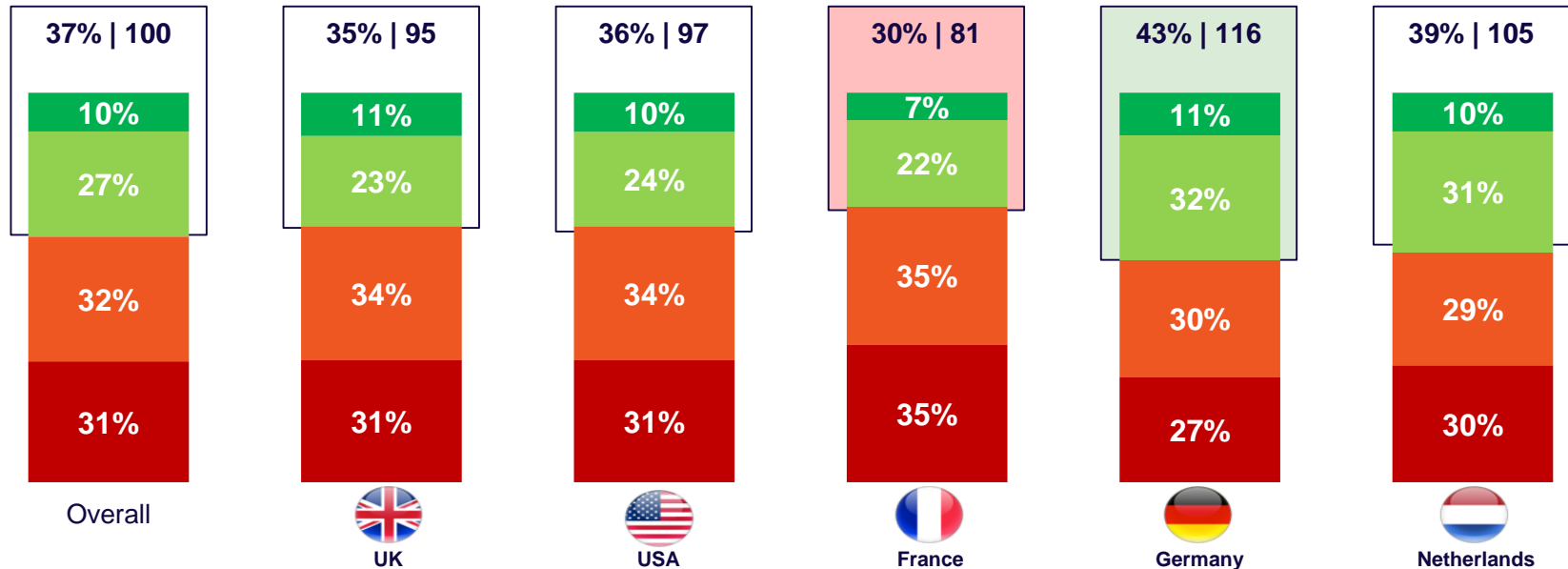


Q27. How much of your time did you spend doing [MAIN ACTIVITY] on this holiday or short break?  
 Base: All P3Y trips (n=6191)

## But over a third of their trips are heavily influenced by doing Outdoor Activities

### EXTENT TO WHICH MAIN ACTIVITY WAS REASON FOR GOING ON HOLIDAY – ALL PAST 3 YEAR TRIPS INVOLVING ACTIVITY

■ Main reason for holiday ■ Significant influence ■ Some small influence ■ No influence

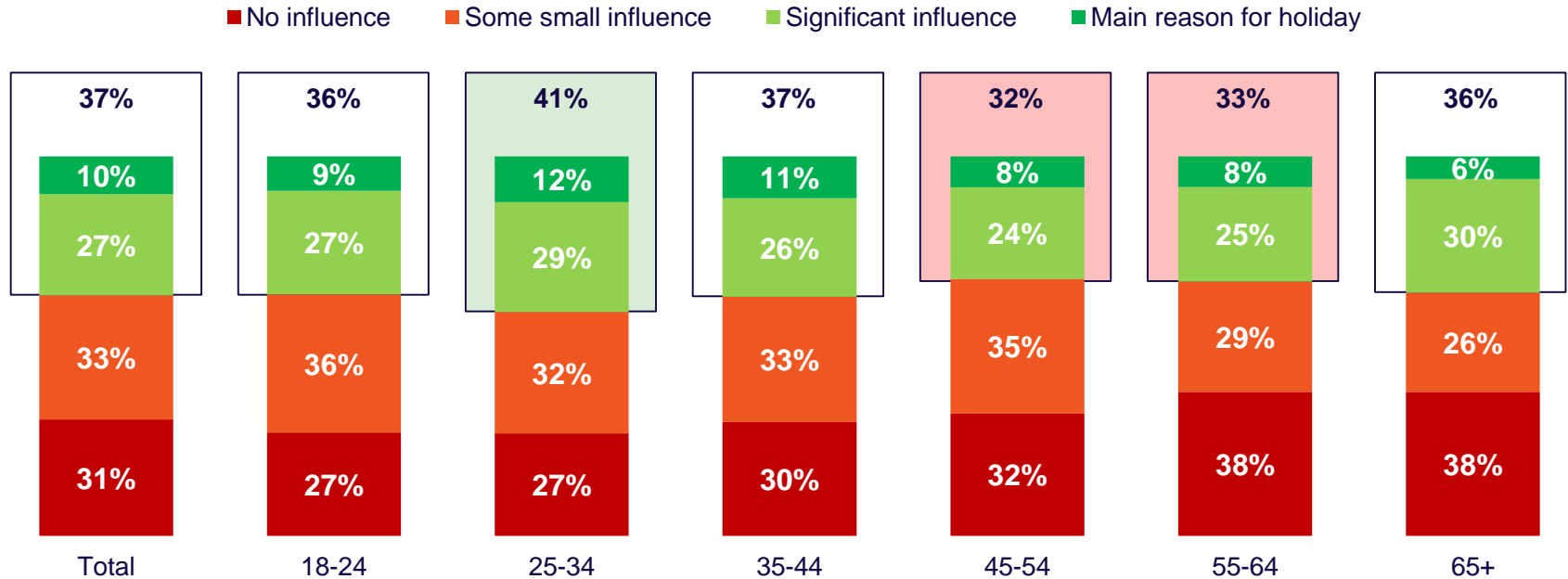


Q26. Which of the following best describes the extent to which [MAIN ACTIVITY] was the reason for going on this holiday?

Base: All P3Y trips (n=6191)

# The influence of activities dips slightly between 45-64, but is slightly higher amongst 25-34 year olds

EXTENT TO WHICH MAIN ACTIVITY WAS REASON FOR GOING ON HOLIDAY – ALL P3Y TRIPS INVOLVING ANY ACTIVITY

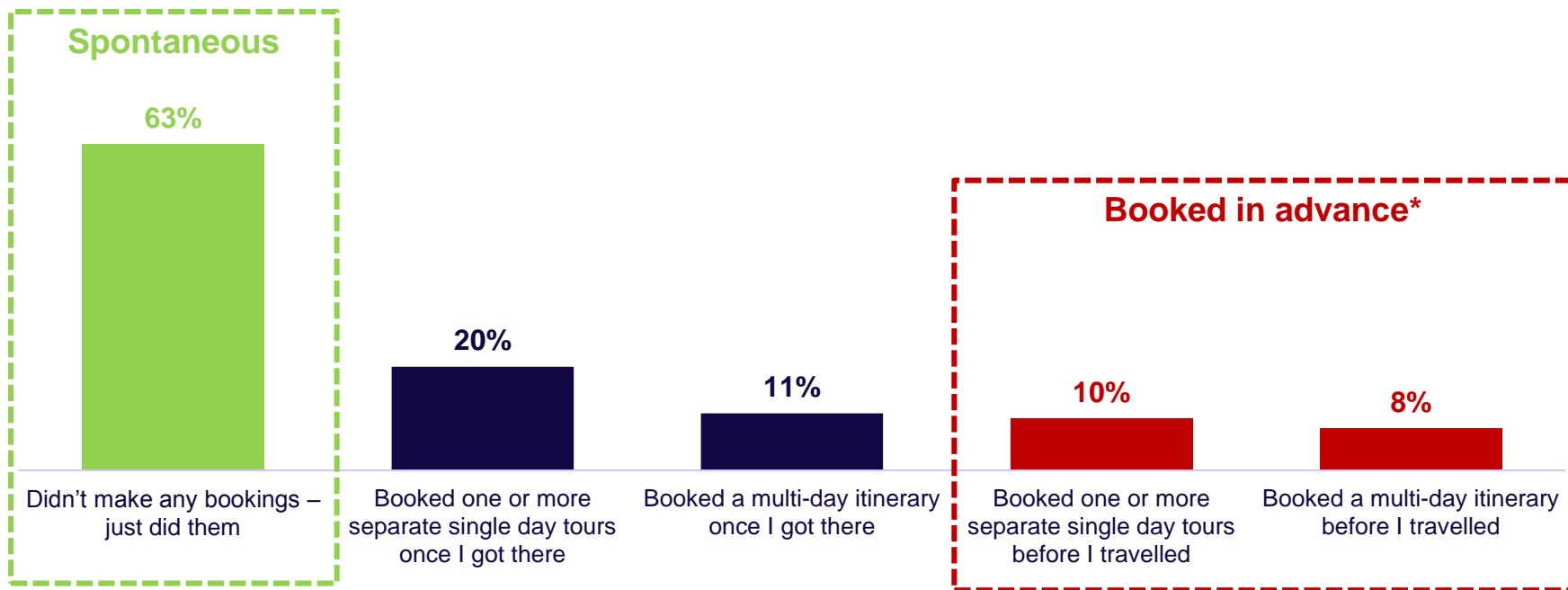


Q26. Which of the following best describes the extent to which [MAIN ACTIVITY] was the reason for going on this holiday?

Base: All P3Y trips (n=6191)

But importance doesn't mean that activities are booked in advance – many aren't booked at all

BOOKING OF MAIN ACTIVITY – ALL PAST 3 YEAR TRIPS INVOLVING ANY ACTIVITY

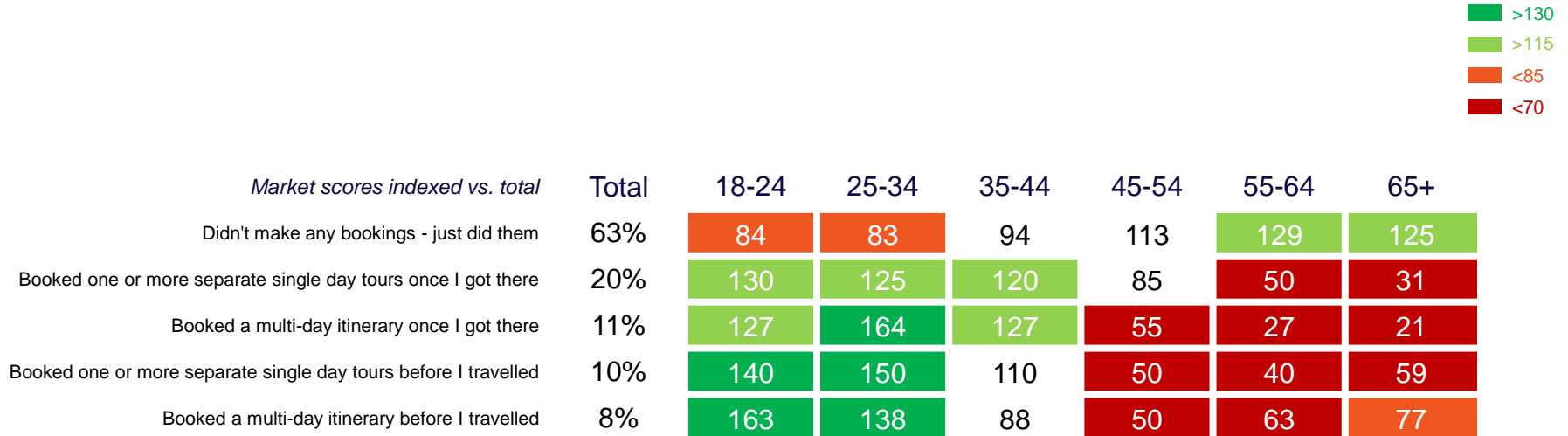


Q24. How did you book the [Activity 1] elements / itineraries of your trip?  
Base: All P3Y trips (n=6191)

\*More info on those who booked in advance in later Booking section

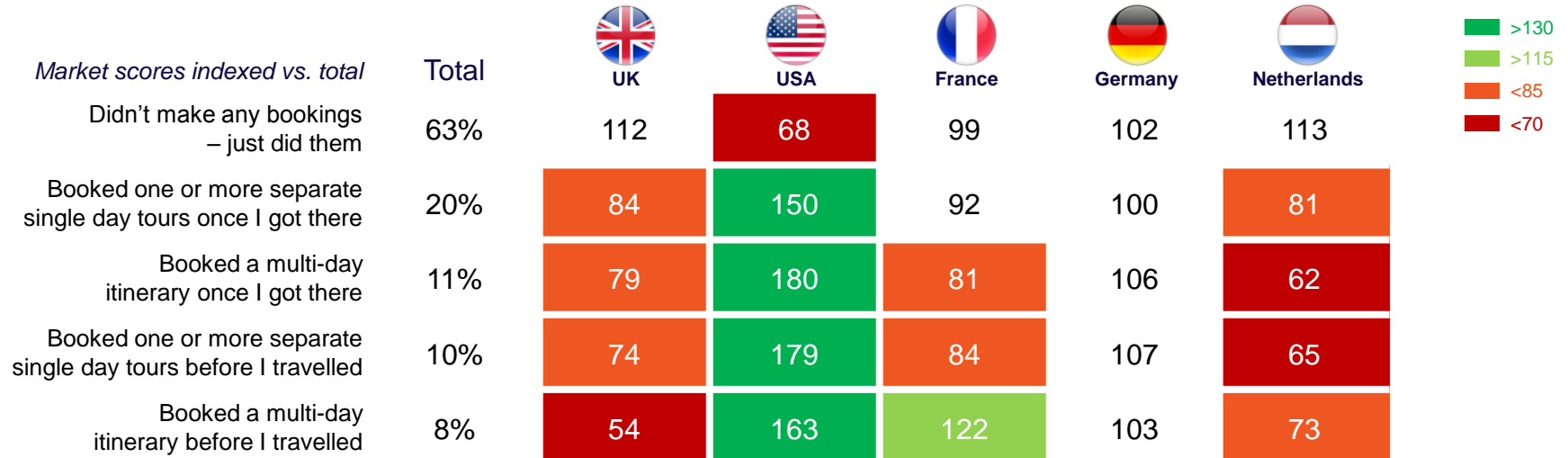
## Booking is more prevalent amongst 18-34s, though most still don't book activities

### BOOKING OF MAIN ACTIVITY – ALL P3Y TRIPS INVOLVING ANY ACTIVITY



## US tourists are looking far more likely to book in advance

### BOOKING OF MAIN ACTIVITY – ALL P3Y TRIPS INVOLVING ANY ACTIVITY



## In general, people simply do not know enough about the English landscape to plan

### Their perceptions of England are dominated by London

- Many have been to London in the past and even those who have not visited London yet have a clear picture
- Top-of-mind are London's tourist attractions:  
Big Ben, Buckingham Palace, Tower Bridge, black cabs, red telephone boxes, Royals/Queen, London Eye, etc.
- London is seen as a vibrant, dynamic city but for some, the attractiveness is limited when considered in isolation:  
Hardly anything surprising to expect  
A touristy city that is not typical for England

*"This is the problem – the coasts of England are unknown, maybe it's just me but there's only adverts about London but never about England. All you see is Big Ben and Madame Tussauds" – Germany*

*"For me London = England and England = London – when we talk about it we always say London, we know far too little about the area around London." – Germany*

#### KEY IDEA

*Regional knowledge of England is tiny for this OA fan – most of the images were a total surprise*



## This lack of awareness means most just don't know how good England can be

### But when they're shown, they get excited

- Specific parks/areas/towns etc. do not work very hard for Outdoor Activity holidays in the way they might for other destinations around the world e.g. the Alps, Appalachia
  - **40%** agree or strongly agree that *'Other countries have better terrain / landscapes for the activities I like'*
- However, the majority find England appealing for most activities and believe it to be appealing, although not 'world-class' for each of the activities
  - **46%** agree or strongly agree that *'I might like to try my favourite activities in England, but wouldn't know where to go'*

*"The Lake District for cycling - vastness, this sense it's never-ending! You can have it in Germany of course - just go to Bavaria – but only England is England!" – Germany*

*"It will offer you a completely different landscape and environment. Better than Germany, but maybe not better than the US" – Germany*

#### KEY IDEA

*There's a sweet spot of 'good enough' and 'close enough' that England hits for much of the the audience*



## Summary: The Outdoor Activities Audience & Their Approach

1

### **Most Are Self-Guiding**

- Independence and freedom aren't just for the activity – it's the whole way they approach the trip and we need to find ways to enable this

2

### **They're a Bit 'Post-Adventure'**

- They've done a lot of activities, but do fewer and fewer as they get older and have families, so they get 'softer' – which might be ideal for the terrain and activities on offer in England

3

### **Outdoor Activities Are Influential**

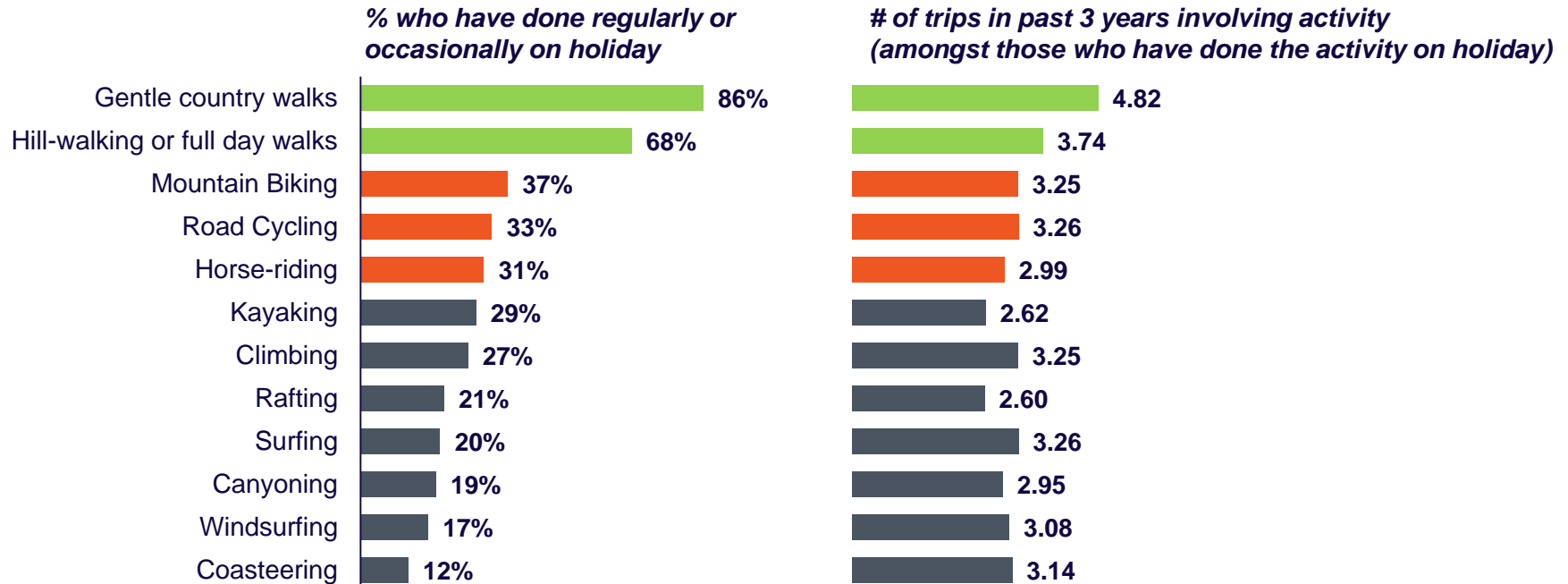
- They drive decision-making – especially in Germany and the Netherlands – but are often late decisions, so we need to reassure that England is an easy place to 'pick up' activities



Outdoor Activities In England - What's The Opportunity?

## Some of the more niche activities have a loyal and enthusiastic fan base

### ACTIVITIES DONE REGULARLY OR OCCASIONALLY ON HOLIDAY AND # HOLIDAYS INVOLVING ACTIVITY

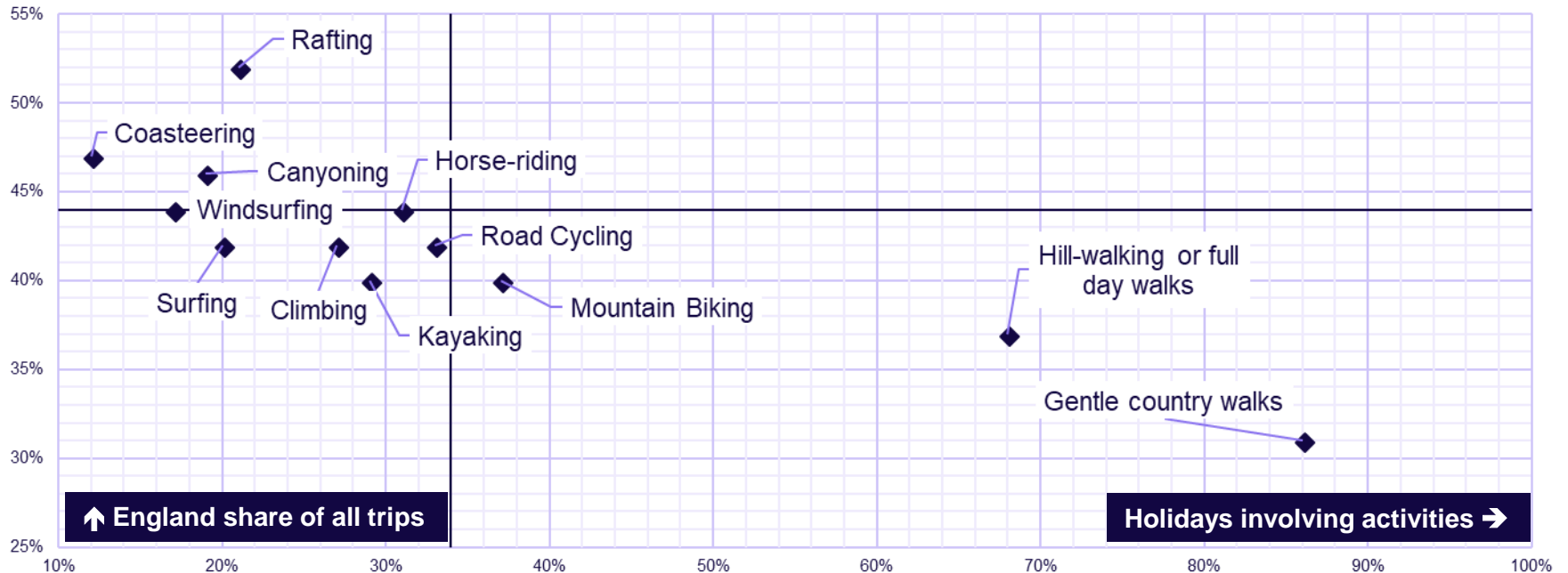


Q11. For each of the below activities please indicate how often, if at all, you have participated in them on holiday or a short break?

Base: All respondents (n=2542)

## It seems England currently does well at attracting more niche outdoor activities

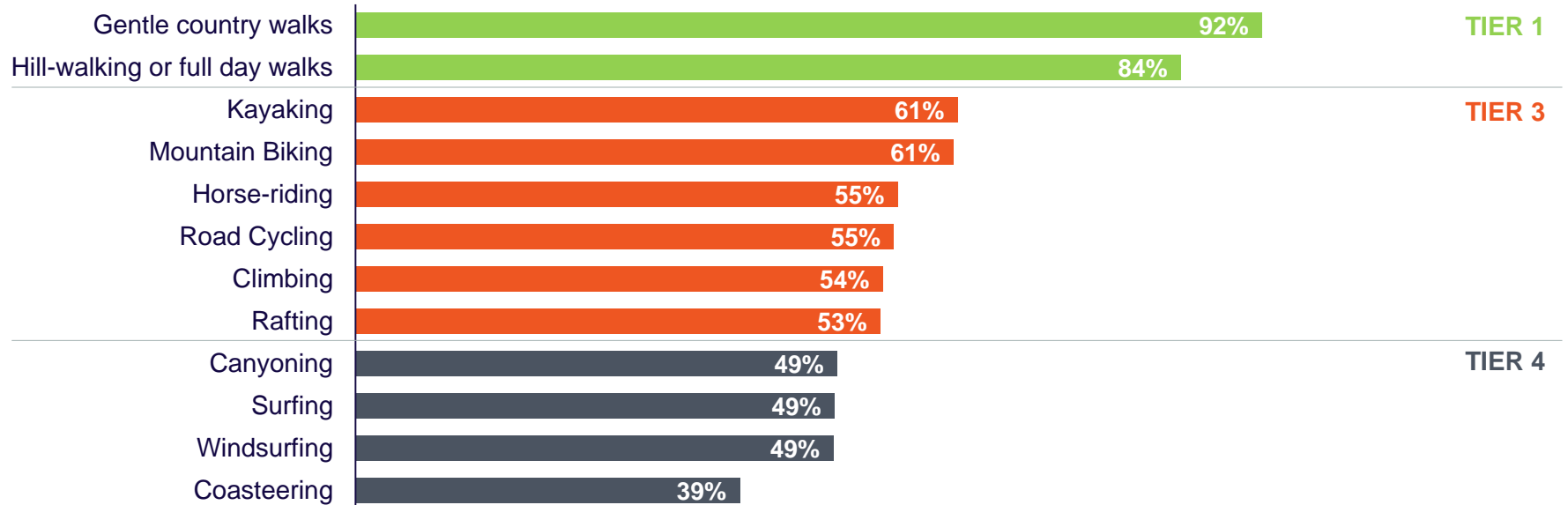
ACTIVITIES DONE ON HOLIDAY (OCCASIONALLY OR REGULARLY) VS. SHARE OF TRIPS “CLAIMED” BY ENGLAND



Q8. For each of the following activities, please let us know if you have taken part in these previously?  
 Q9a/b. How interested would you be in trying these activities(again) in the future? **Base:** All respondents (n=2542)

## But there's plenty of interest in walking, cycling ... and even kayaking

### INTEREST IN ACTIVITIES – NET OF QUITE / VERY INTERESTED ACROSS THOSE WHO HAVE / HAVEN'T TRIED ACTIVITY

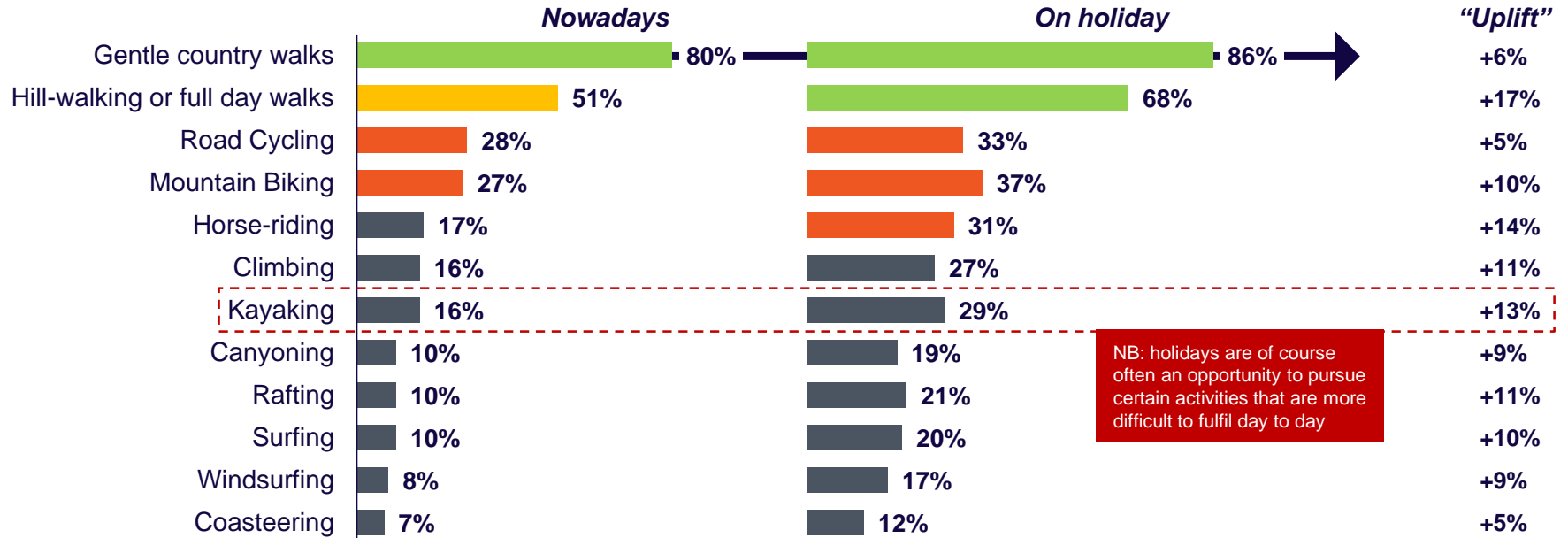


Q9a/b. How interested would you be in trying these activities(again) in the future?

Base: All respondents (n=2542)

## And holidays are often an opportunity to pursue new or less everyday activities

### ACTIVITIES DONE NOWADAYS VS. ACTIVITIES DONE REGULARLY OR OCCASIONALLY ON HOLIDAY



Q8. For each of the following activities, please let us know if you have taken part in these previously?

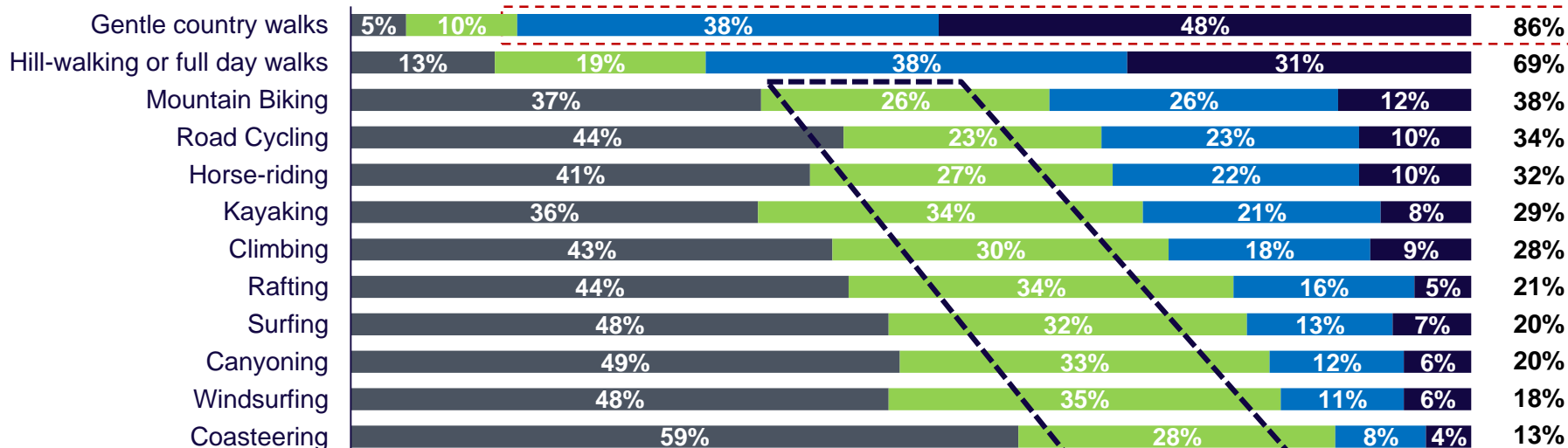
Q11. For each of the below activities please indicate how often, if at all, you have participated in them on holiday or a short break? **Base:** All respondents (n=2542)

# So 'activities tried before' are easiest to tap into, but there may be more potential

## ACTIVITIES DONE REGULARLY OR OCCASIONALLY ON HOLIDAY AND INTEREST IN ACTIVITIES GENERALLY

➔ NB: composed of interest in pursuit of activities on holidays and generally!

■ Uninterested ■ Interested ■ Occasionally participate on hols ■ Regularly participate on hols



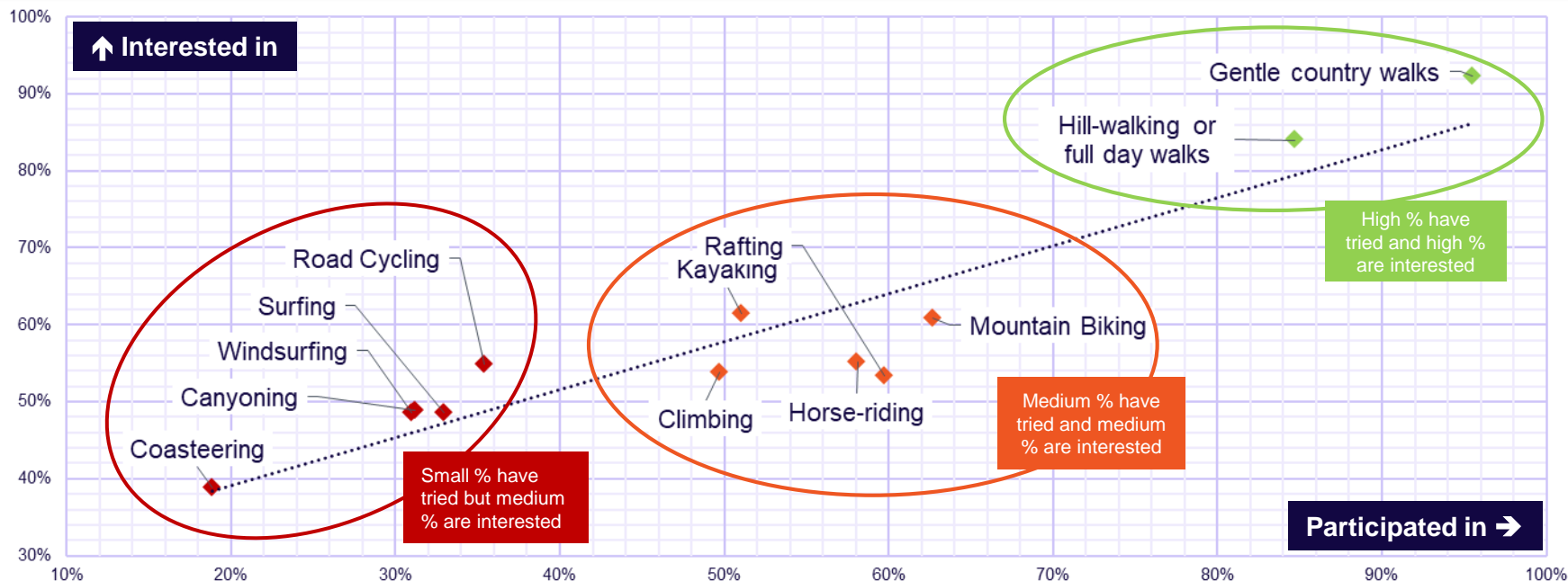
NOTE POTENTIAL

Q9a. How interested would you be in trying these activities in the future?

Q11. For each of the below activities please indicate how often, if at all, you have participated in them on holiday or a short break? **Base:** All respondents (n=2542)

# Crossing activities tried with interest in trying suggests three broad opportunities

## PARTICIPATION IN ACTIVITIES VS. INTEREST IN ACTIVITIES



Q8. For each of the following activities, please let us know if you have taken part in these previously?

Q9a/b. How interested would you be in trying these activities(again) in the future? **Base:** All respondents (n=2542)



## Summary: The Opportunity for Outdoor Activities In England

1

### **An Island of Activities?**

- England has a reasonable share of 'land-based' activities, but given the coastline could perhaps look to dominate water-based outdoor activities as a definitive outdoor activity destination

2

### **Opportunities For Mass-Appeal**

- England has a good share of some of the more niche activities, but could perhaps look to grow cycling, horse-riding and coastal activity provision and marketing to the levels enjoyed by walking

3

### **Beginner-Friendly Is Important**

- There's medium interest in a large number of outdoor activities on holiday, but for 10/12 activities there is low experience among the audience, so communicating the accessibility looks to be essential



## Outdoor Activities In England – Profiling The Opportunity

# Designing an 'active' holiday in England

Respondents were asked to design a hypothetical, yet realistic trip to England of at least 2 nights, and involving **at least one** outdoor activity.

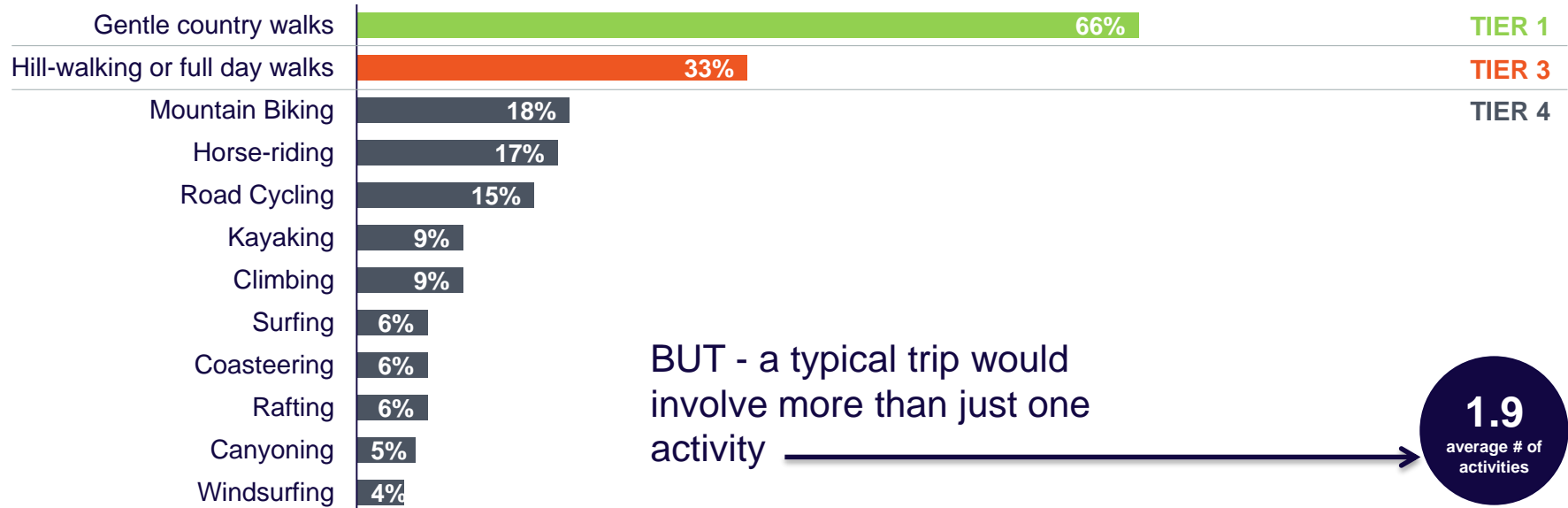
Respondents detailed the activities (outdoors and other) that they would do, how long and where they would stay, as well as time of year and choice of travel companion(s).

The following slides show the opportunity for England.



## Activities involving walking and cycling look to represent high volume potential

### ACTIVITIES LIKE TO PARTICIPATE IN ON A HOLIDAY / SHORT BREAK TO ENGLAND

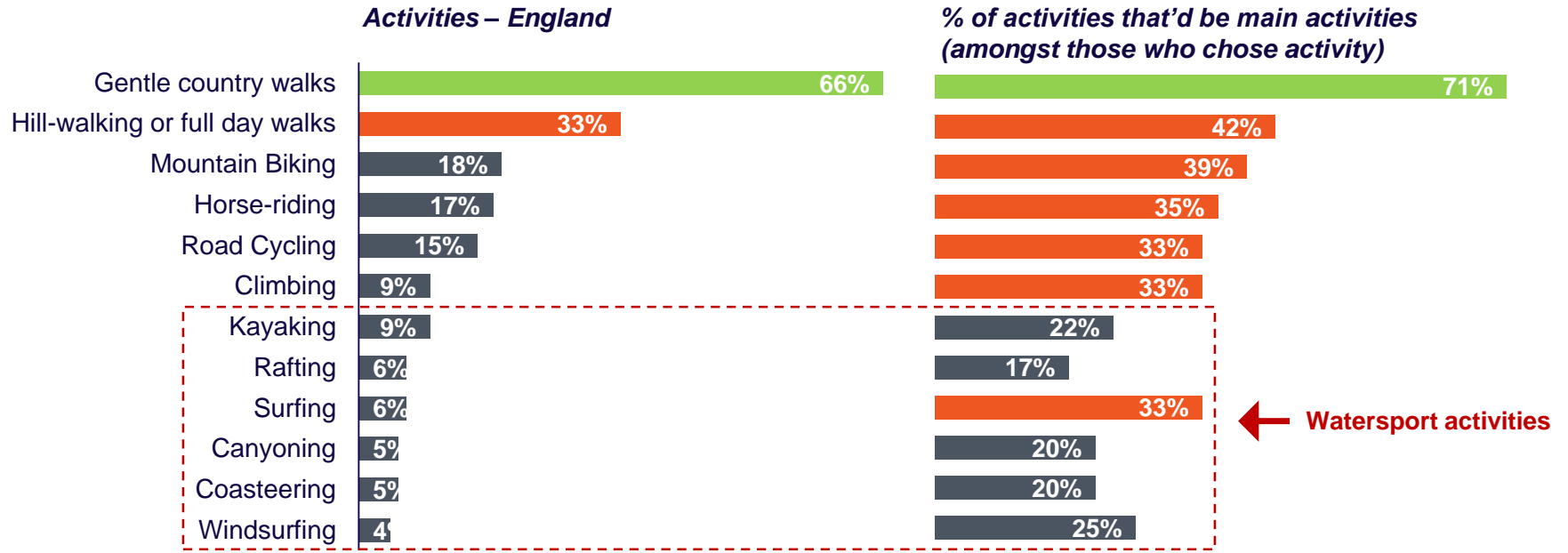


Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)

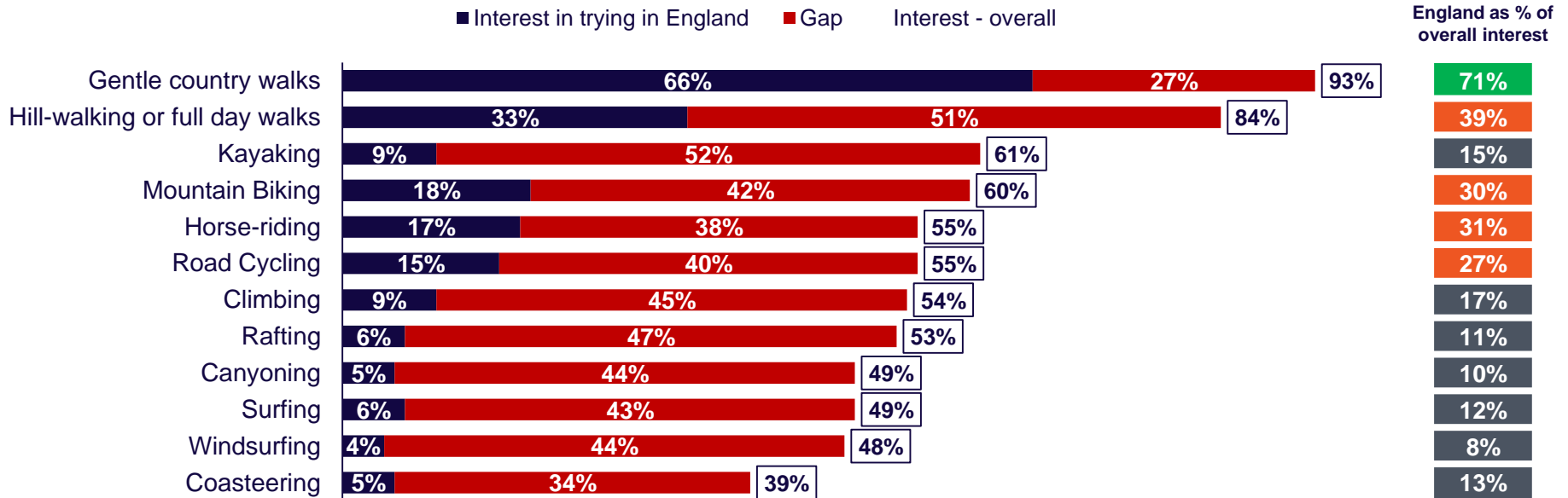
Watersport activities are not seen as a particular strongpoint for England – they’re the lowest ranking activities overall and, except for surfing, the least likely to be main activities on a holiday or short break to England

ACTIVITIES LIKE TO PARTICIPATE IN ON HOLIDAY TO ENGLAND VS. MAIN ACTIVITIES LIKE TO PARTICIPATE IN



Comparing *activity interest overall vs. activities England is considered for* gives an indication of areas of strength. England “claims” the largest shares of interest in the case of walking, biking and horse-riding

INTEREST IN ACTIVITIES – NET OF QUITE / VERY INTERESTED ACROSS THOSE WHO HAVE / HAVEN'T TRIED ACTIVITY



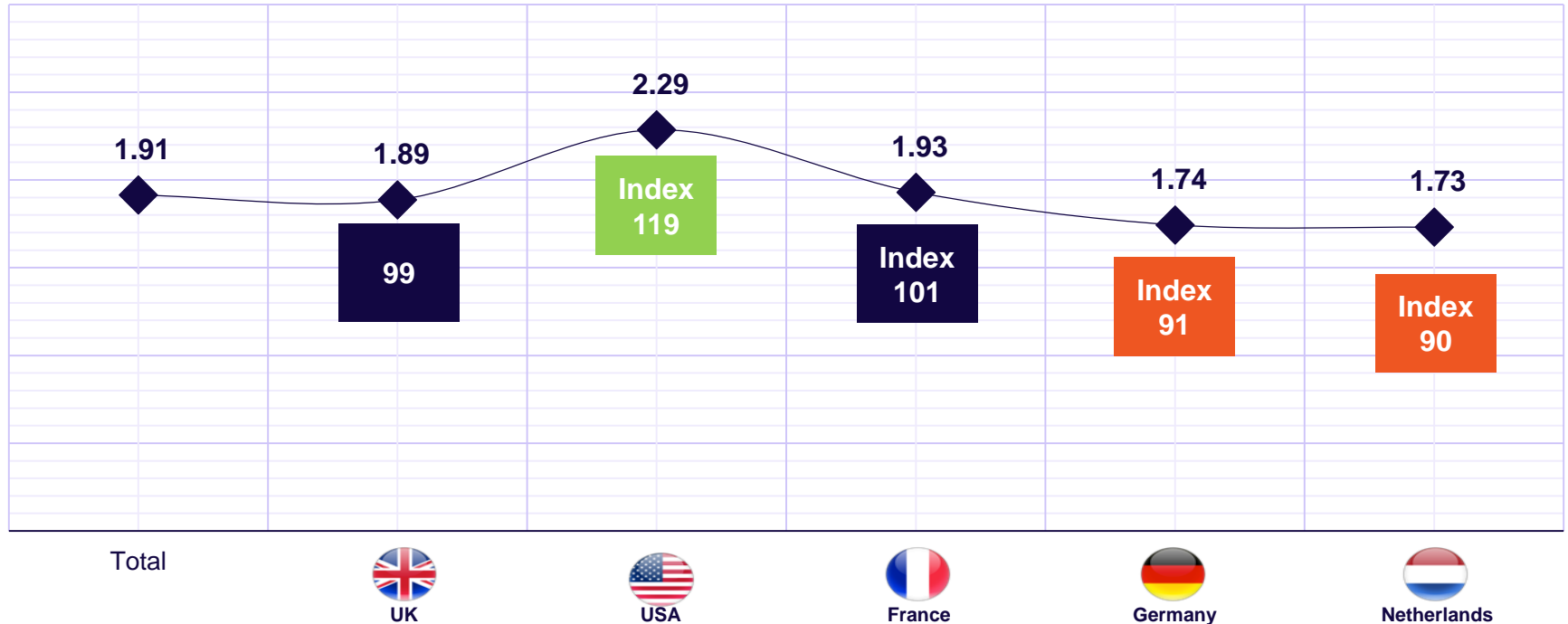
Leaving minor variations to one side, the same activities tend to perform best – i.e. largest share of England interest vs. overall interest – at the level of individual markets

INTEREST IN ACTIVITIES – NET OF QUITE / VERY INTERESTED ACROSS THOSE WHO HAVE / HAVEN'T TRIED ACTIVITY

	UK		USA		France		Germany		Netherlands	
	Total interest	England as % of interest	Total interest	England as % of interest	Total interest	England as % of interest	Total interest	England as % of interest	Total interest	England as % of interest
Gentle country walks	90%	64%	96%	71%	94%	63%	88%	78%	94%	81%
Hill-walking or full day walks	82%	33%	87%	43%	89%	46%	75%	31%	87%	41%
Kayaking	59%	22%	79%	15%	71%	11%	51%	12%	49%	12%
Mountain Biking	61%	28%	65%	29%	78%	28%	50%	34%	49%	29%
Horse-riding	55%	25%	77%	35%	59%	29%	47%	36%	39%	26%
Road Cycling	61%	28%	71%	34%	66%	26%	40%	20%	37%	19%
Climbing	56%	20%	65%	15%	59%	14%	50%	22%	41%	12%
Rafting	51%	12%	74%	11%	60%	8%	39%	13%	43%	9%
Canyoning	50%	16%	65%	9%	59%	8%	35%	9%	34%	6%
Surfing	50%	20%	59%	10%	52%	6%	47%	13%	34%	9%
Windsurfing	47%	11%	64%	8%	54%	7%	41%	12%	36%	8%
Coasteering	45%	16%	58%	17%	40%	13%	25%	12%	25%	8%

# US visitors are open to pursuing more activities, in contrast to Germany and the Netherlands

AVERAGE NUMBER OF ACTIVITIES LIKE TO PARTICIPATE IN ON A HOLIDAY / SHORT BREAK TO ENGLAND



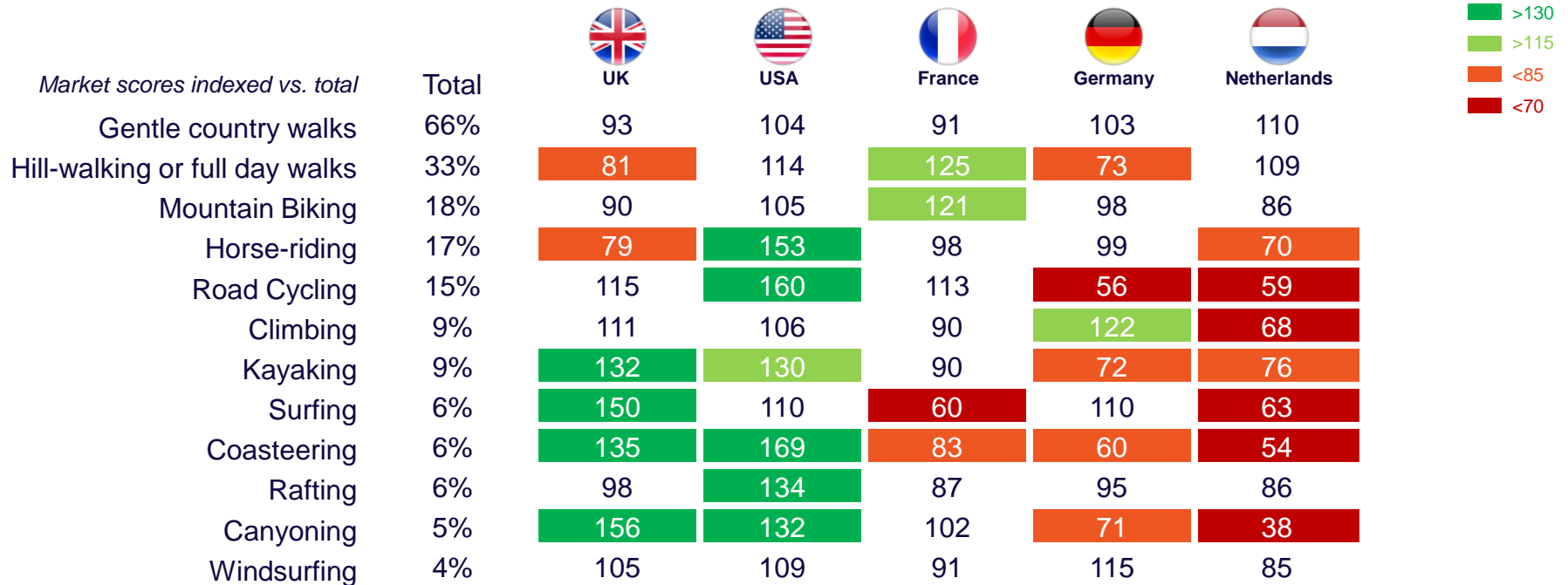
Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)



## Niche activities appeal more to England-based and US visitors

### ACTIVITIES LIKE TO PARTICIPATE IN ON A HOLIDAY / SHORT BREAK TO ENGLAND



Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)



## Considerable overlap of activities ... and some clustering too

### ACTIVITIES LIKE TO PARTICIPATE IN ON A HOLIDAY / SHORT BREAK TO ENGLAND. TOP 5 OVERLAPS HIGHLIGHTED GREEN

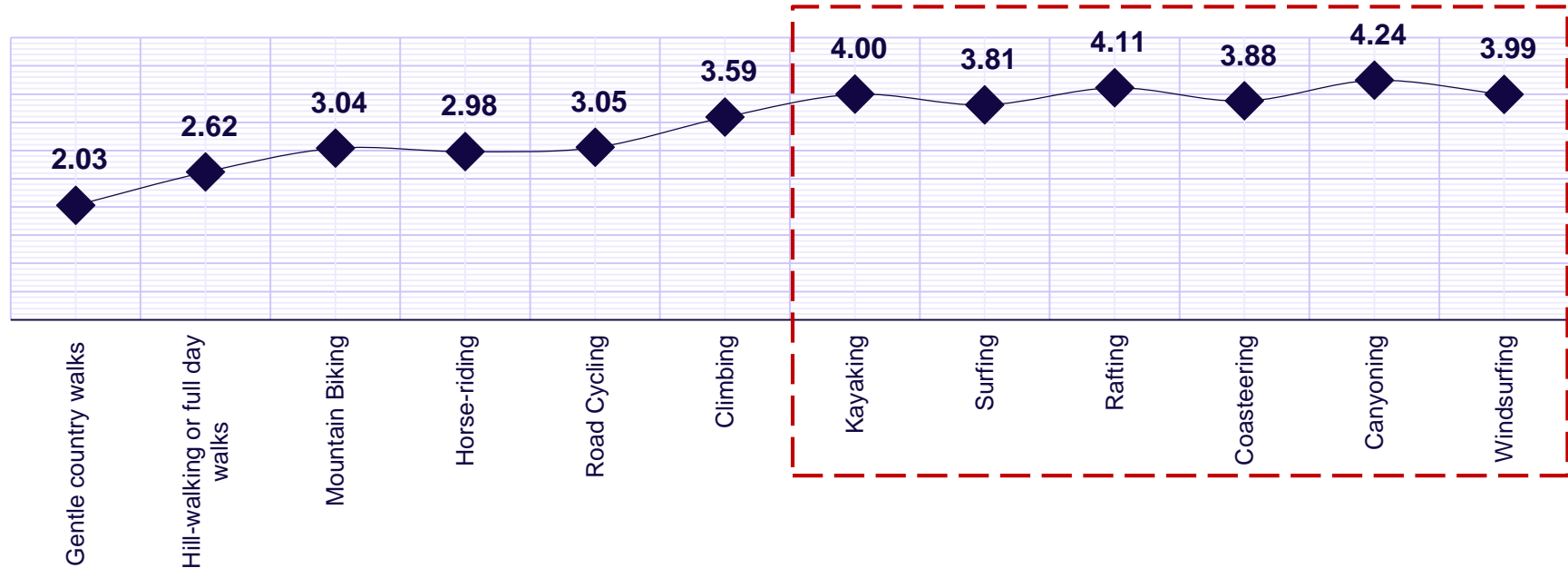
	Total	Gentle country walks	Hill-walking or full day walks	Mountain Biking	Horse-riding	Road Cycling	Climbing	Kayaking	Surfing	Rafting	Coasteering	Canyoning	Windsurfing
Gentle country walks	66%		64%	49%	62%	51%	45%	53%	37%	46%	51%	42%	37%
Hill-walking or full day walks	33%	32%		36%	32%	32%	35%	41%	29%	34%	36%	35%	29%
Mountain Biking	18%	13%	20%		18%	34%	33%	29%	28%	34%	27%	32%	28%
Horse-riding	17%	16%	17%	17%		24%	28%	25%	26%	19%	23%	27%	22%
Road Cycling	15%	11%	14%	28%	21%		20%	21%	22%	22%	19%	26%	21%
Climbing	9%	6%	10%	17%	15%	13%		25%	27%	27%	25%	25%	26%
Kayaking	9%	7%	11%	14%	13%	12%	24%		29%	38%	33%	40%	37%
Surfing	6%	3%	5%	9%	9%	9%	17%	19%		20%	19%	22%	35%
Rafting	6%	4%	6%	11%	6%	8%	17%	25%	20%		22%	35%	26%
Coasteering	5%	4%	6%	8%	7%	7%	15%	21%	18%	21%		21%	19%
Canyoning	5%	3%	5%	9%	8%	9%	13%	22%	19%	30%	18%		20%
Windsurfing	4%	2%	4%	7%	6%	6%	13%	19%	27%	20%	15%	18%	

Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)

Those interested in some of the more niche activities are also interested in doing more activities overall, whilst on a holiday to England

AVERAGE # ACTIVITIES LIKE TO PARTICIPATE IN ON A HOLIDAY / SHORT BREAK TO ENGLAND – BY ACTIVITY

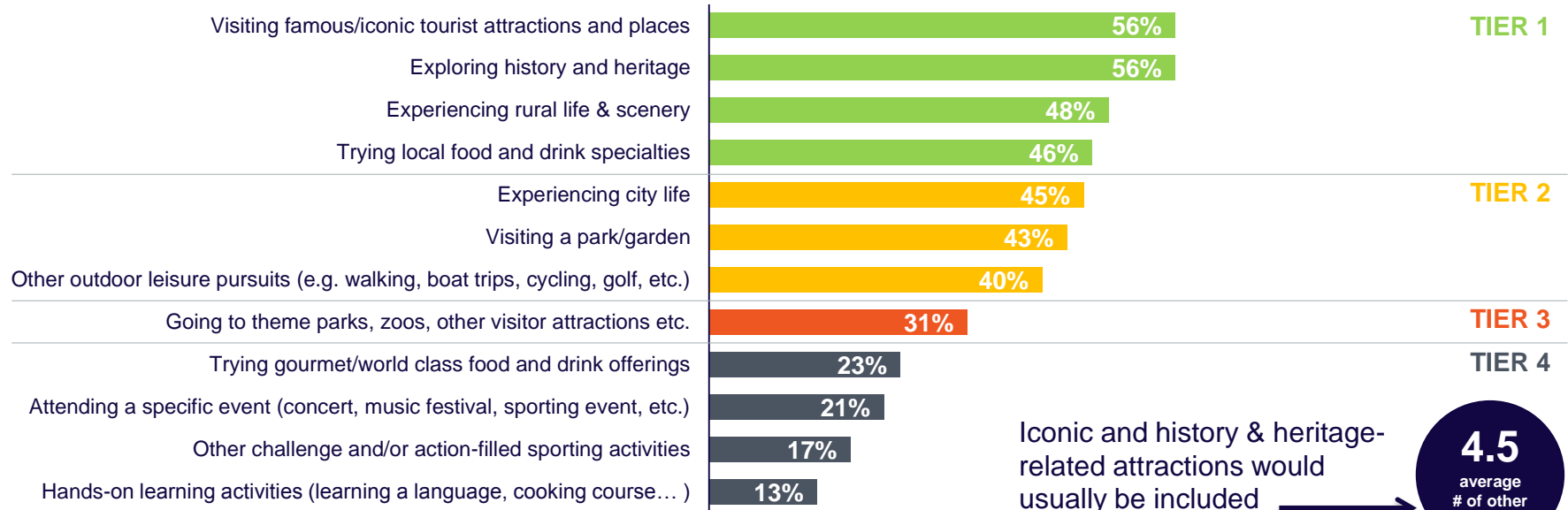


Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)

# This audience expects to mix up their holiday with more than outdoor activities

## OTHER ACTIVITIES PURSUED ON HOLIDAY TO ENGLAND INVOLVING OUTDOOR ACTIVITY

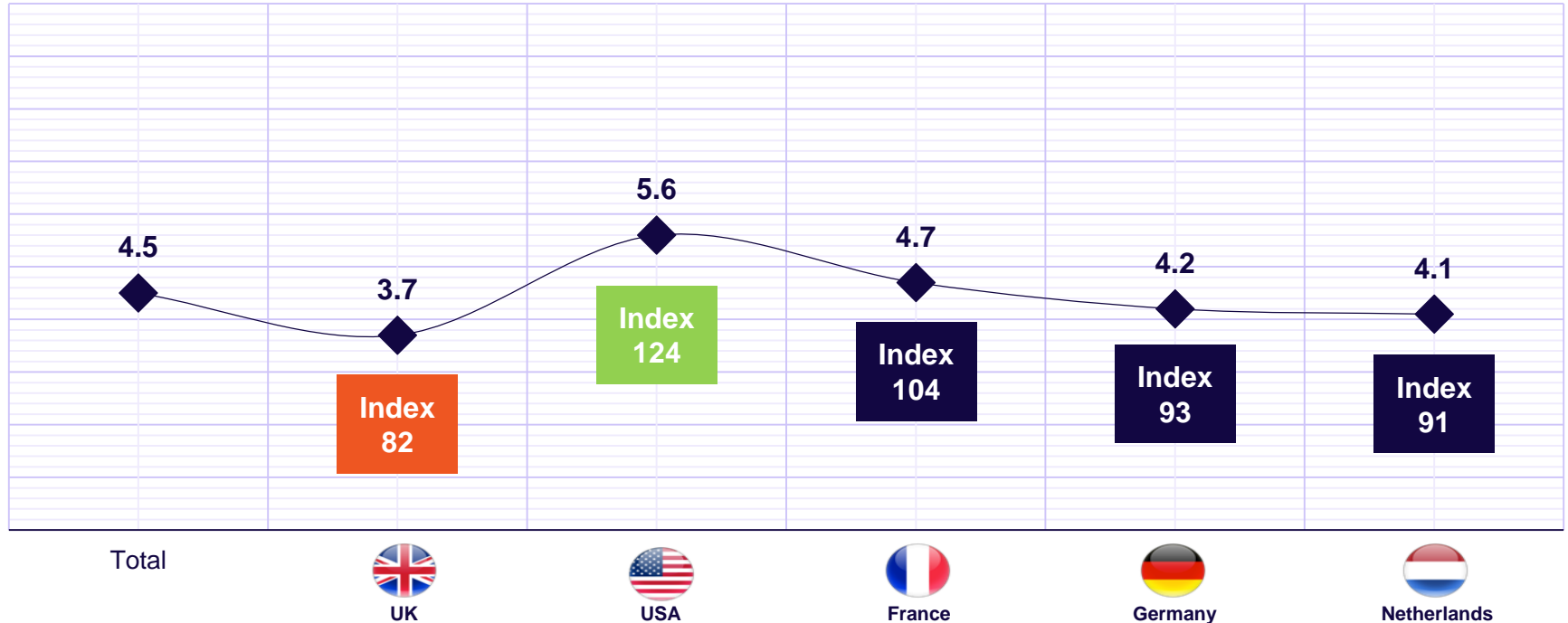


Q40. As well as the outdoor activities previously selected, which of the below, if any, would you look to do?

Base: All respondents (n=2542)

## The US market are particularly interested in combining other types of activity

### AVERAGE NUMBER OF OTHER ACTIVITIES PURSUED ON HOLIDAY TO ENGLAND INVOLVING OUTDOOR ACTIVITY



Q34. Which month would you prefer to visit?  
 Base: All respondents (n=2542)

## London's profile dominance plays out in the regions they'd expect to try activities

### WHERE IN ENGLAND GO FOR ACTIVITIES – OVERALL

London  
31%

North West  
12%

East of England  
10%

South West  
21%

Yorkshire & the Humber  
12%

East Midlands  
8%

South East  
16%

North East  
10%

West Midlands  
8%

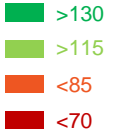
Q30. Where in England would you go for this??

Base: All respondents (n=2542)

## But water-based activities seem to widen consideration of Beyond London trips

### WHERE IN ENGLAND GO FOR ACTIVITIES – BY MAIN ACTIVITIES

	Total	Would participate in all activities equally	Gentle country walks	Hill-walking or full day walks	Horse-riding	Climbing	Surfing	Kayaking	Windsurfing	Coasteering	Canyoning	Rafting
London	31%	94	100	123	97	90	77	42	68	68	45	184
South West	21%	129	105	76	114	62	181	114	152	100	119	52
South East	16%	100	100	100	69	119	125	131	131	100	94	50
North West	12%	108	92	125	125	67	108	142	158	158	175	125
Yorkshire & Humber	12%	117	100	75	150	67	133	108	50	75	117	0
North East	11%	82	82	109	64	145	136	109	173	155	182	136
East of England	10%	130	90	90	90	130	100	60	180	180	60	150
East Midlands	8%	88	88	125	100	175	100	25	163	100	0	88
West Midlands	8%	100	100	88	100	63	188	88	213	63	88	100

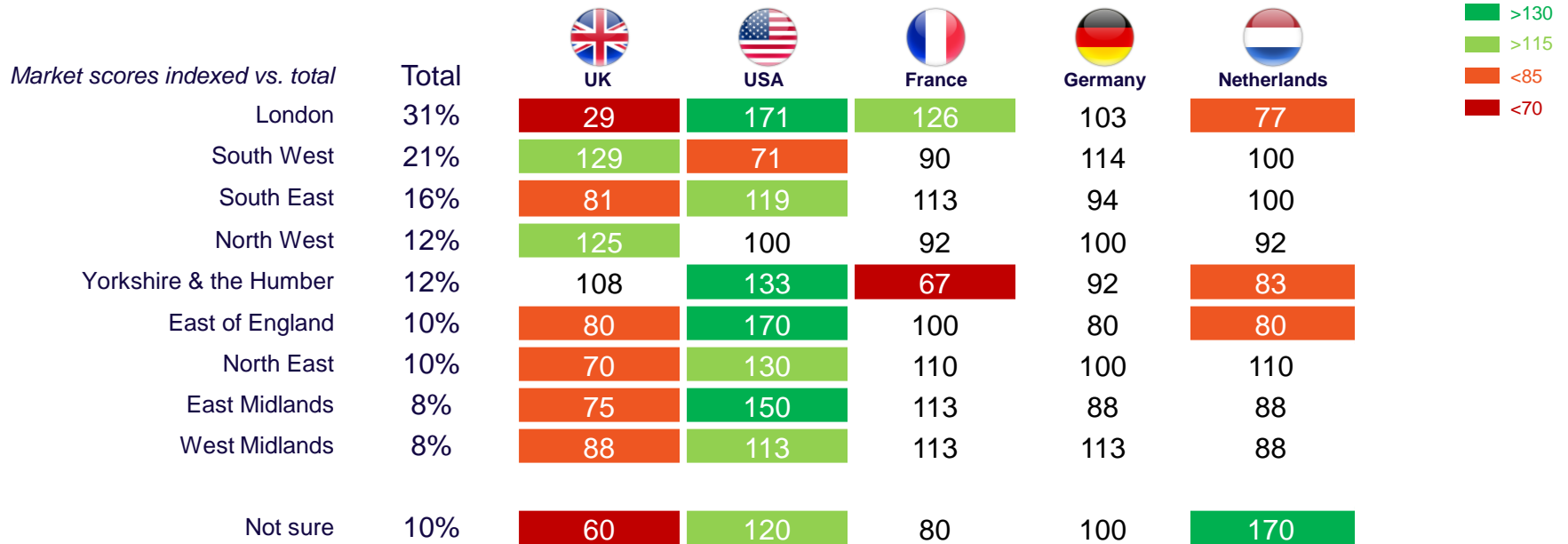


Q29. Which one of the following activities would you spend the most time participating in? Q30. Where in England would you go for this?

Base: All respondents (n=2542)

# London is less attractive for domestic audiences, but a major pull for the USA and France

## WHERE IN ENGLAND GO FOR ACTIVITIES



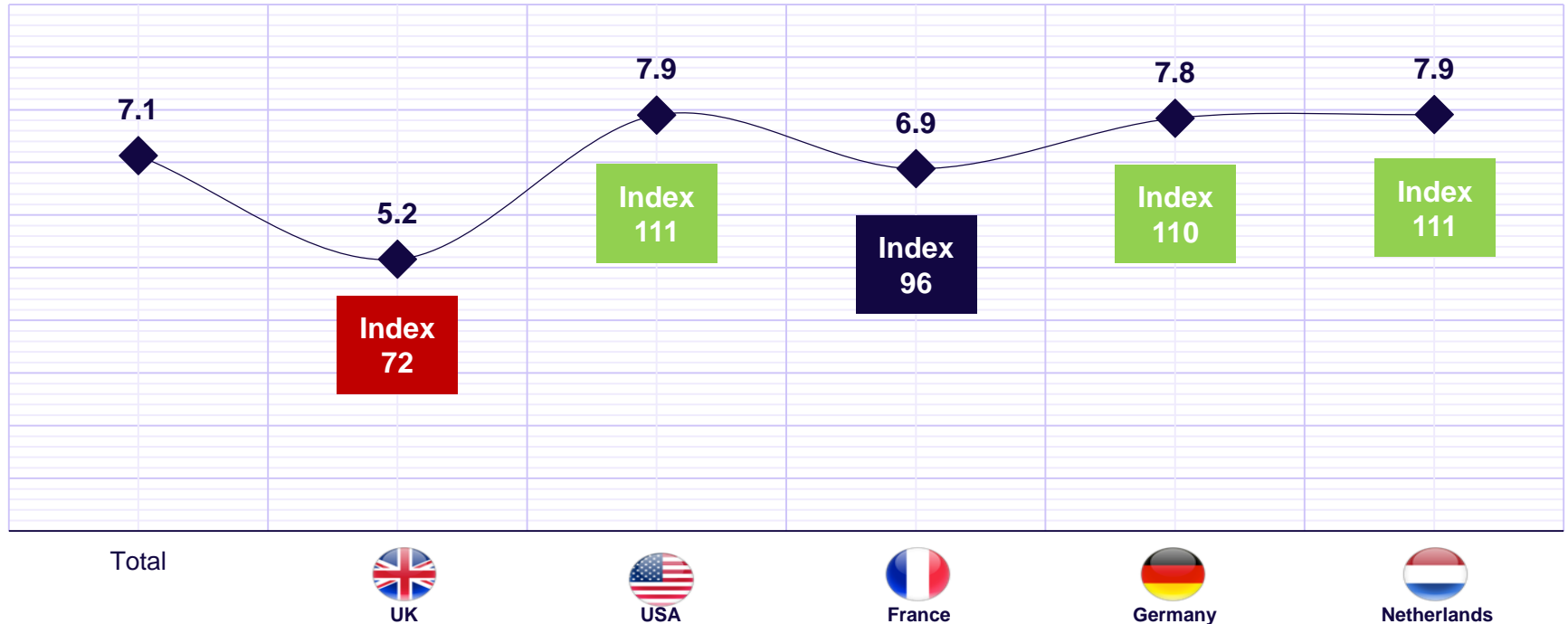
Q28. Please select which of the below activities you would like to participate in on a holiday or short break to England (minimum 2-night stay)?

Base: All respondents (n=2542)



The average expected trip length is 7 days; higher for US and lower for domestic

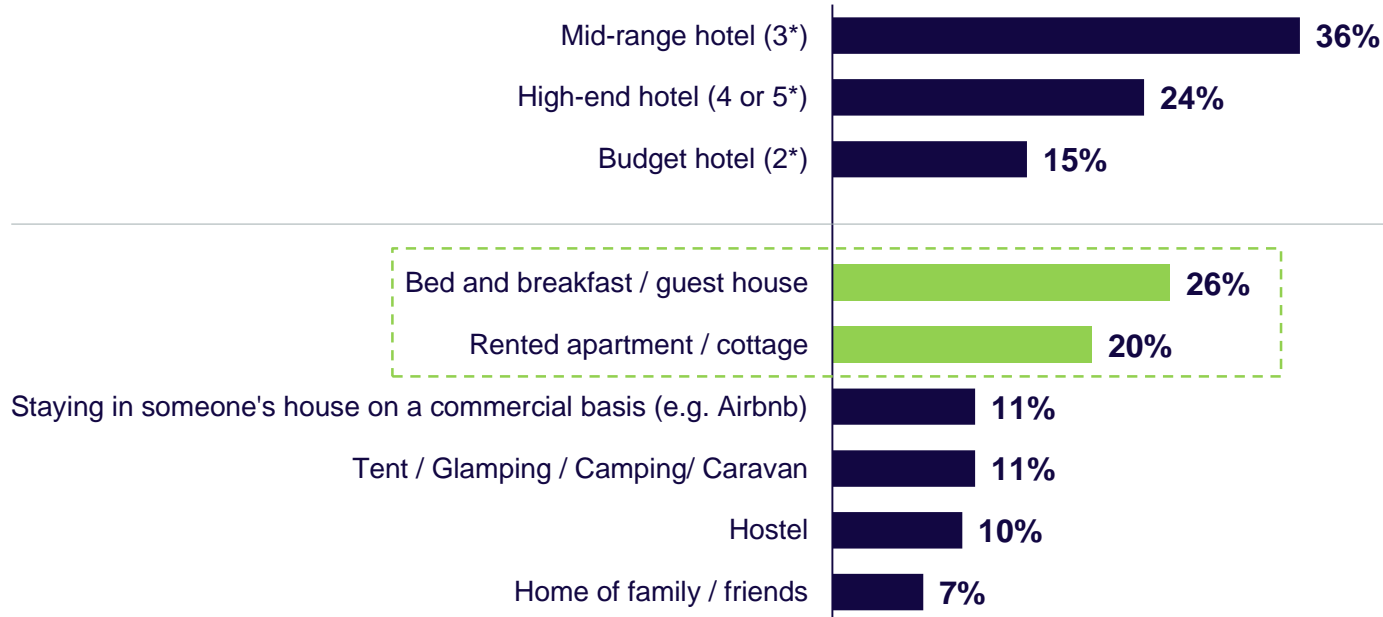
AVERAGE NUMBER OF DAYS SPENT IN ENGLAND ON HOLIDAY INVOLVING OUTDOOR ACTIVITIES



Q33. How long would you spend in England for this??  
 Base: All respondents (n=2542)

## Beyond hotels, B&Bs and rented homes are key accommodation types

### ACCOMODATION STAYED IN ON ENGLAND HOLIDAY INVOLVING OUTDOOR ACTIVITIES

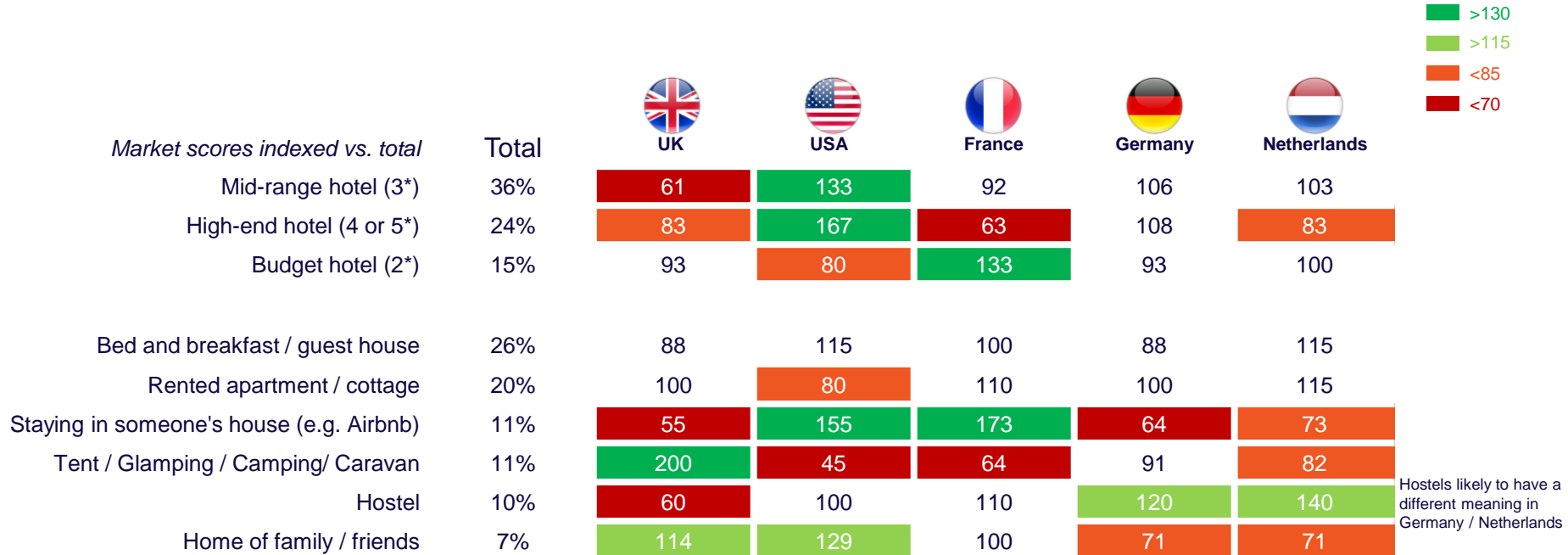


Q37. Which types of accommodation would you stay in during this trip?

Base: All respondents (n=2542)

## But there's considerable variation in accommodation preferences by market

### ACCOMODATION STAYED IN ON ENGLAND HOLIDAY INVOLVING OUTDOOR ACTIVITIES



## Warm months clearly dominate the calendar, but with relatively wide shoulders

### MONTH PREFERRED FOR ENGLAND VISIT

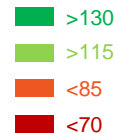


Q34. Which month would you prefer to visit?  
Base: All respondents (n=2542)

# Jan – Mar looks more attractive for intense activities (but bear in mind more activities are typically pursued)

## MONTH PREFERRED FOR ENGLAND VISIT – BY MAIN ACTIVITY

	Total	Gentle country walks	Hill-walking or full day walks	Mountain Biking	Horse-riding	Road Cycling	Climbing	Surfing	Kayaking	Windsurfing	Coasteering	Canyoning	Rafting
Jan-Mar	13%	54	85	177	162	215	162	246	192	162	231	123	246
Apr-Jun	47%	109	104	94	94	79	77	87	74	79	85	83	70
Jul-Sep	52%	104	96	77	102	83	94	98	73	98	69	65	88
Oct-Dec	11%	100	100	91	91	136	91	73	109	173	55	255	36



Q29. Which one of the following activities would you spend the most time participating in? Q34. Which month would you prefer to visit?  
 Base: All respondents (n=2542)

## Summary: The Ideal Outdoor Activities Trip

1

### **Multi-Activity Trips - The Norm**

- The trips designed almost always involve more than one activity (even for the die-hard fan), especially for the more niche outdoor activities

2

### **Not Just Outdoor Activities**

- The audience do not see these trips as pure activity – there is considerable interest in a wider, more diverse range of activities that they want to include

3

### **A Range Of Accommodation**

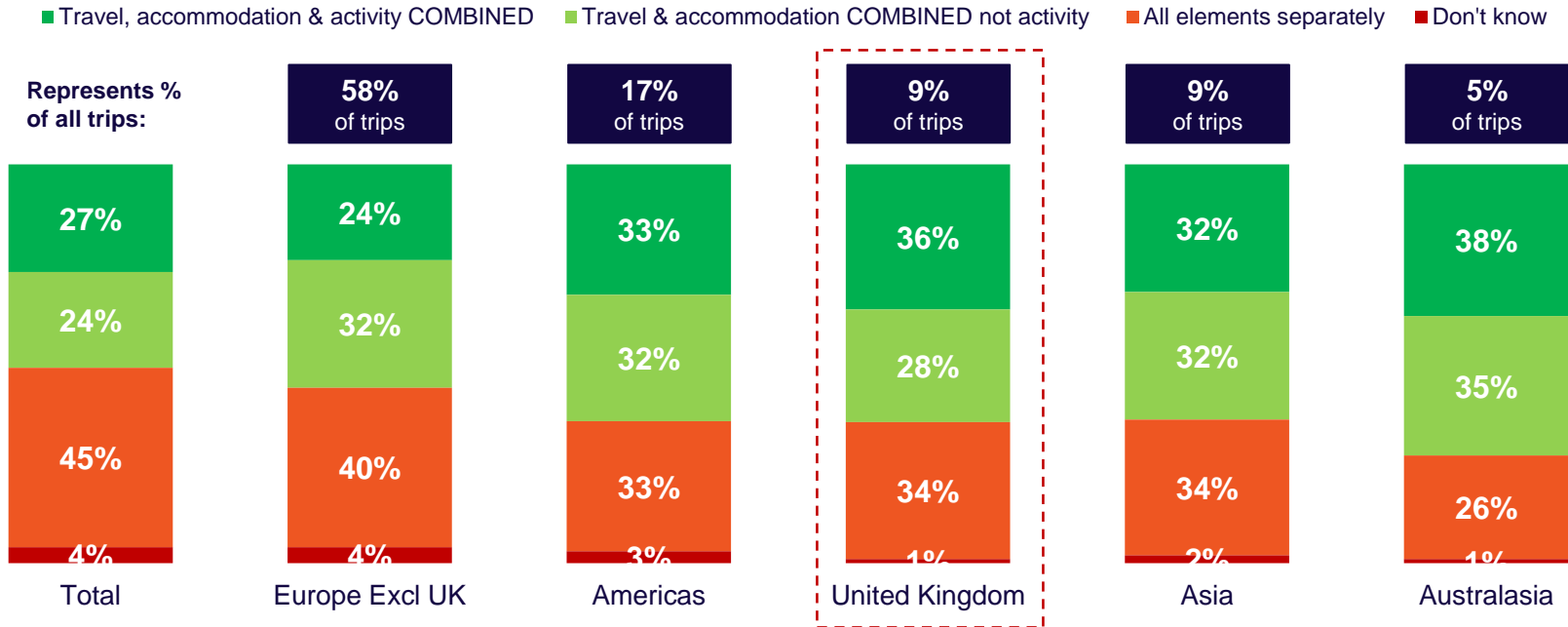
- This kind of visitor is interested in looking beyond hotels – B&B and guesthouses are important and even hostels for some markets



Booking

Trips to the UK are some of the most likely to involve booking of activities, but overall only a little more than a quarter of all trips involve booking of activities (more than a third for trips to the UK)

HOW WAS HOLIDAY BOOKED? BY DESTINATION

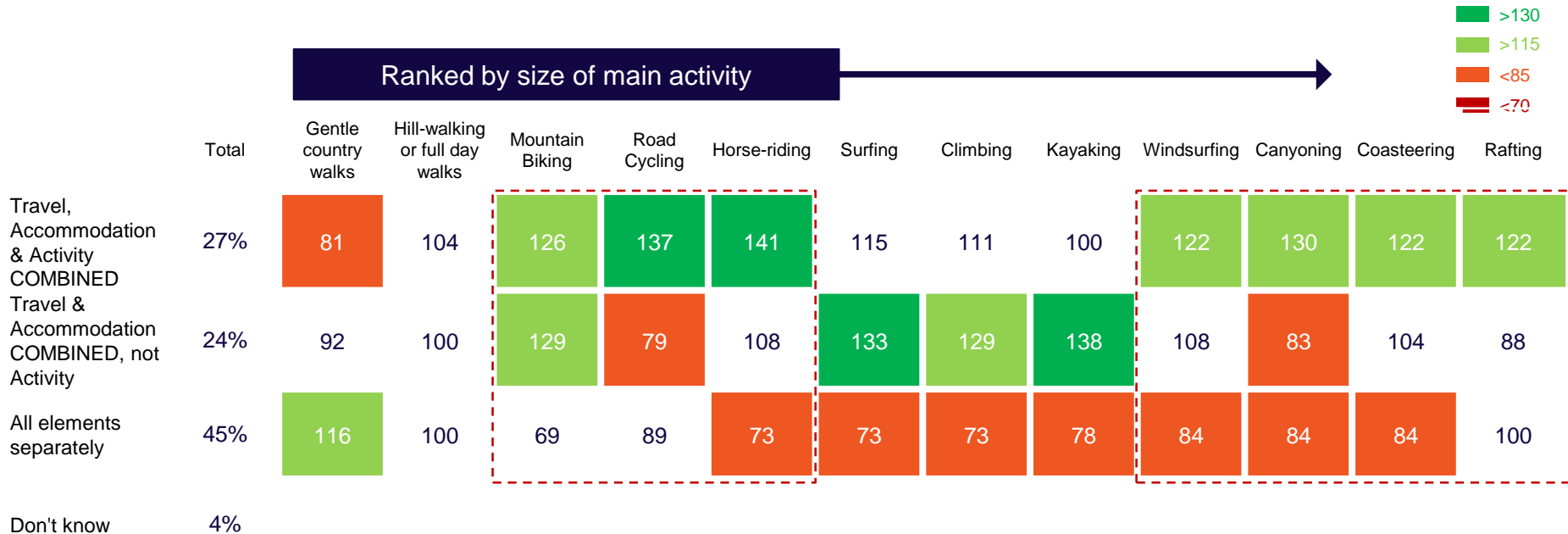


Q23. Which of the following best describes how this trip was booked?  
 Base: All P3Y trips (n=6191)



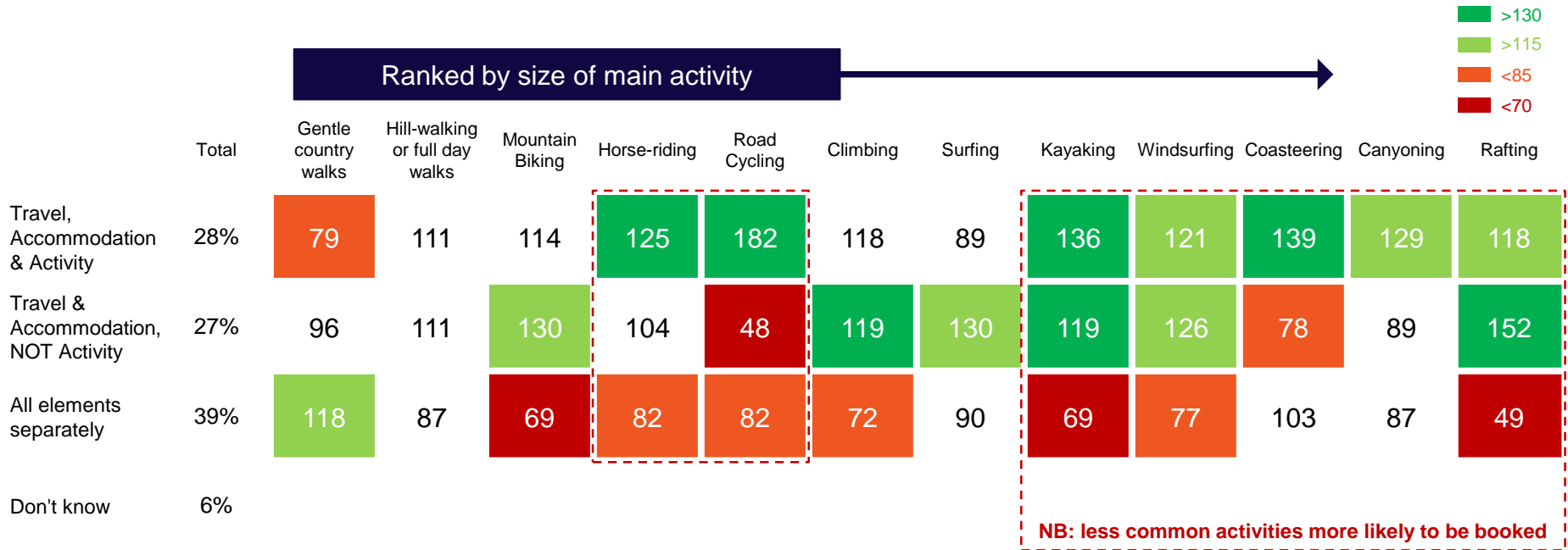
Of the more prominent activities, Road Cycling and Horse-riding in particular stand out in terms of being activities that are booked in conjunction with travel and accommodation (Mountain Biking less clearly so)

HOW WAS HOLIDAY BOOKED? BY MAIN ACTIVITIES



In the specific case of England, only about **one in four** envisage booking travel, accommodation and activities together. But likelihood to book activities still higher for Horse Riding and Road Cycling trips

HOW WOULD ENGLAND TRIP BE BOOKED?

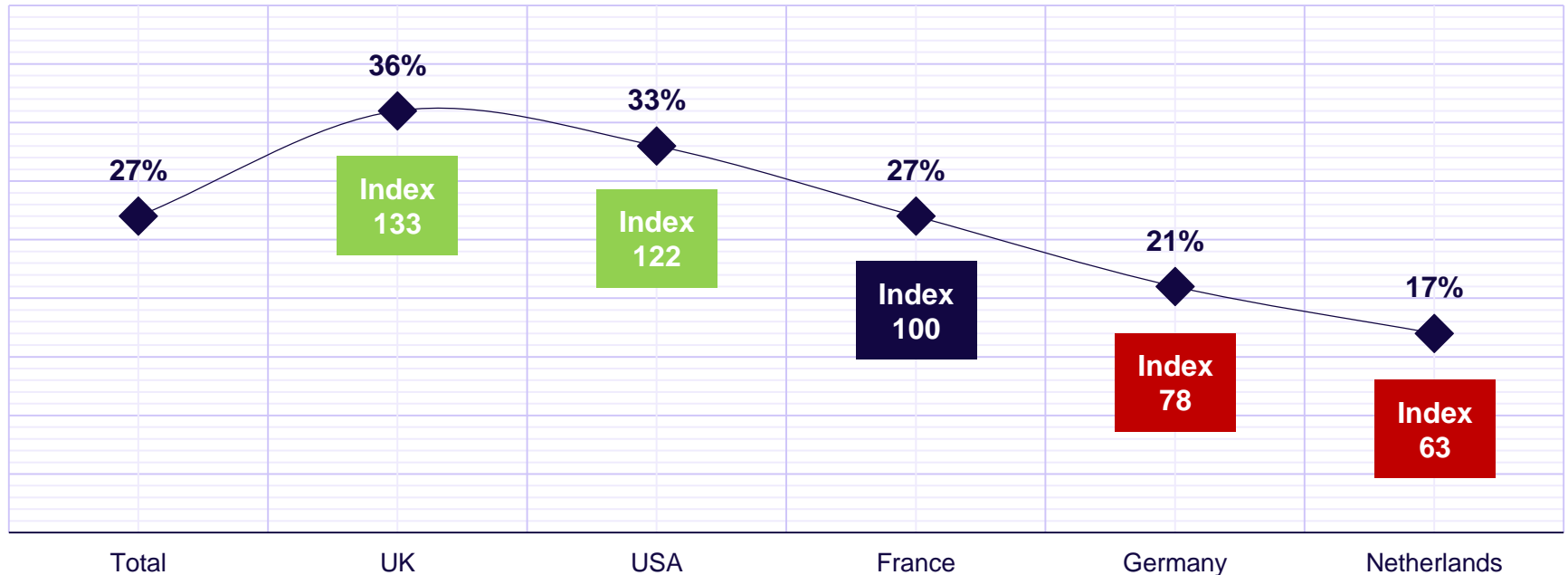


Q41. Which of the following best describes how this trip would be booked?

Base: All respondents (n=2542); base size for activities = 26+

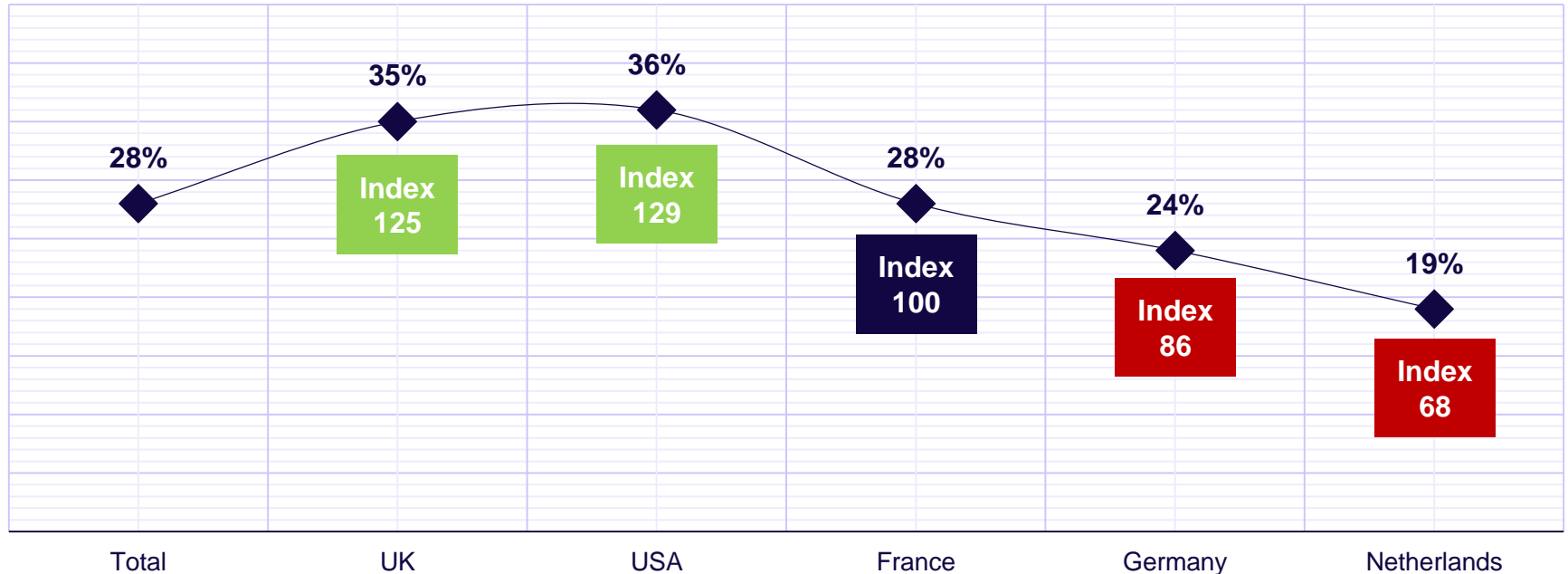
So who books in advance? UK and US tourists are more likely to book all three in advance, i.e. travel, accommodation and an activity / activities; German & Dutch tourists look to be more spontaneous

HOW WAS HOLIDAY BOOKED? BOOKING OF TRAVEL, ACCOMMODATION & ACTIVITY BY MARKET



UK and US tourists also more likely to book travel, accommodation and activities in advance in the specific context of a trip to England. German & Dutch tourists remain less likely to do so

HOW WOULD ENGLAND TRIP BE BOOKED? BOOKING OF TRAVEL, ACCOMMODATION & ACTIVITY BY MARKET

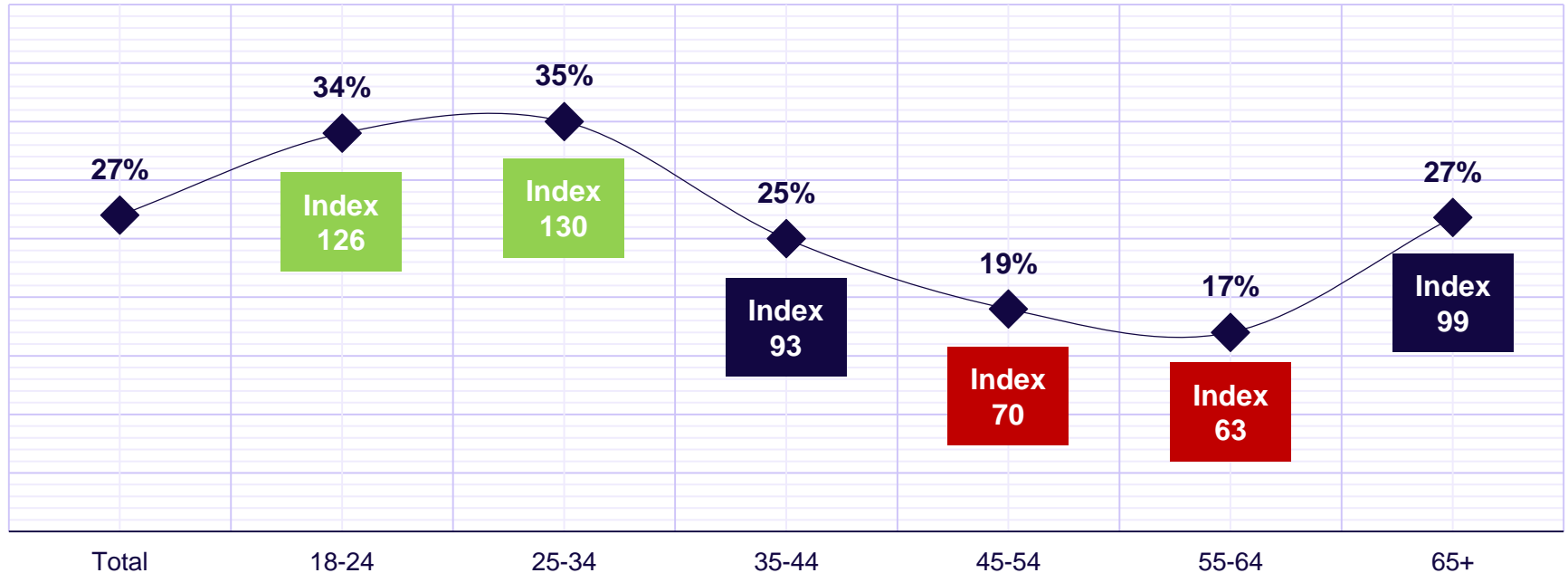


Q41. Which of the following best describes how this trip would be booked?

Base: All respondents (n=2542)

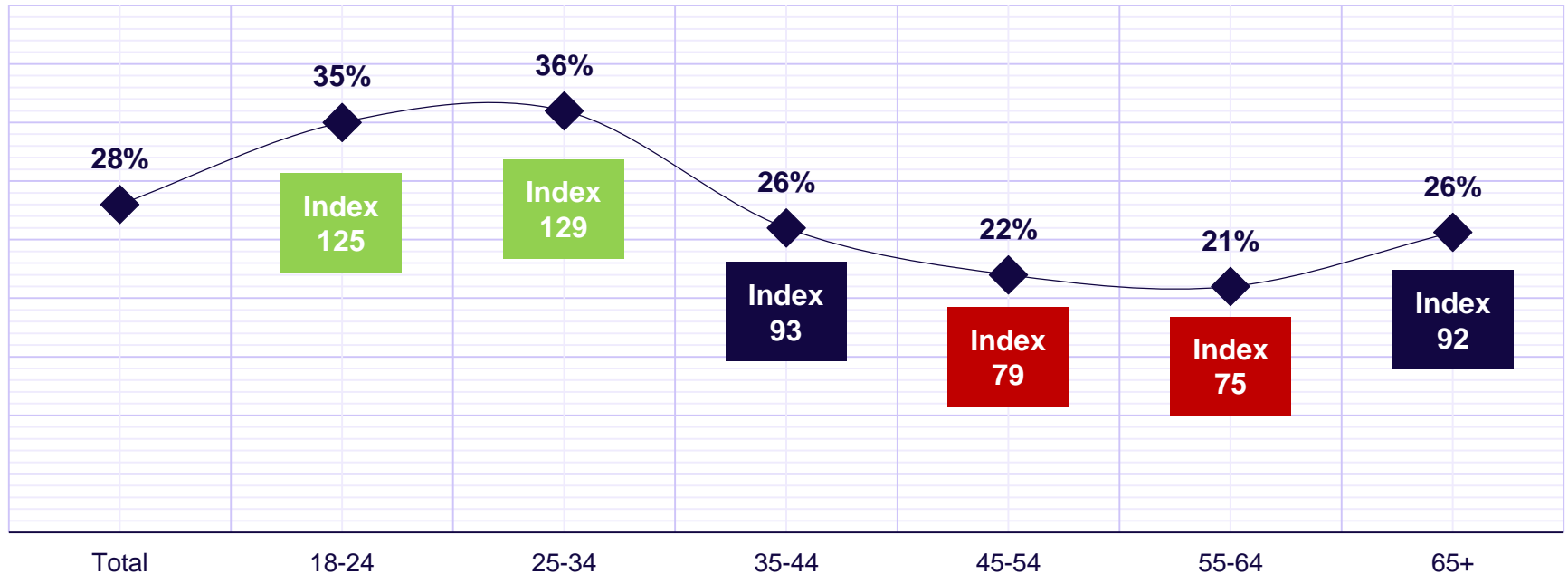
It seems 18-34s are the most likely to book travel, accommodation and activities together (reflecting their greater involvement in activities that are booked)

HOW WAS HOLIDAY BOOKED? BOOKING OF TRAVEL, ACCOMMODATION & ACTIVITY BY AGE



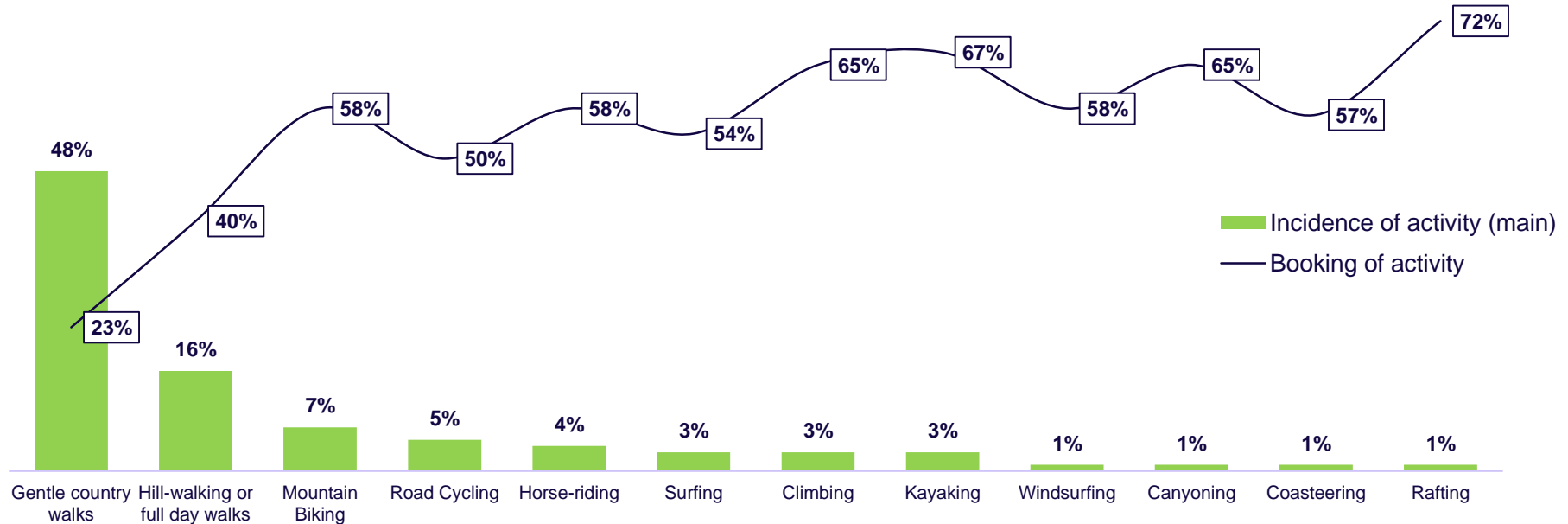
In the case of trips to England, it is again 18-34s who'd be most likely to book all three elements, i.e. travel, accommodation and activities

HOW WOULD ENGLAND TRIP BE BOOKED? BOOKING OF TRAVEL, ACCOMMODATION & ACTIVITY BY AGE



In terms of activities, there's a relationship between how common an activity is and how likely it is that the activity will involve some element of booking – the more common, the less likely to be booked

HOW WAS MAIN ACTIVITY BOOKED?

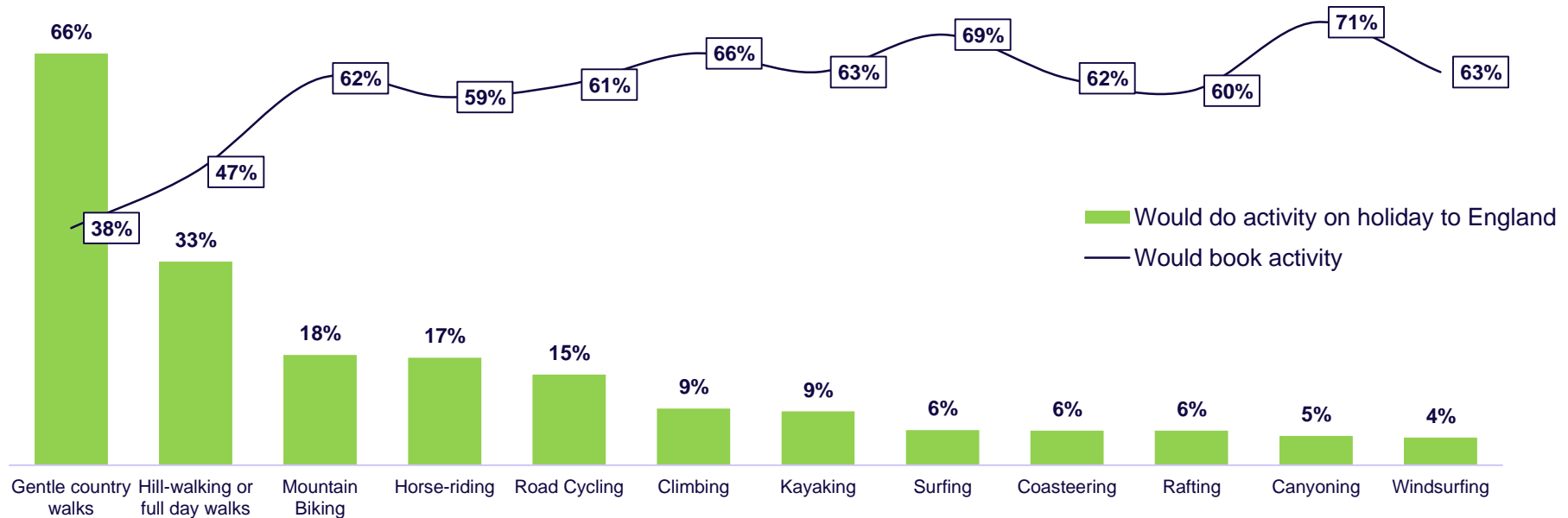


Q24. How did you book the [Activity 1] elements / itineraries of your trip?

Base: All P3Y trips (n=6191)

This is reflected in how activities would be booked on a trip to England, with the most commonly considered activities also being the ones visitors would be least likely to book

HOW ACTIVITIES ON TRIP TO ENGLAND WOULD BE BOOKED



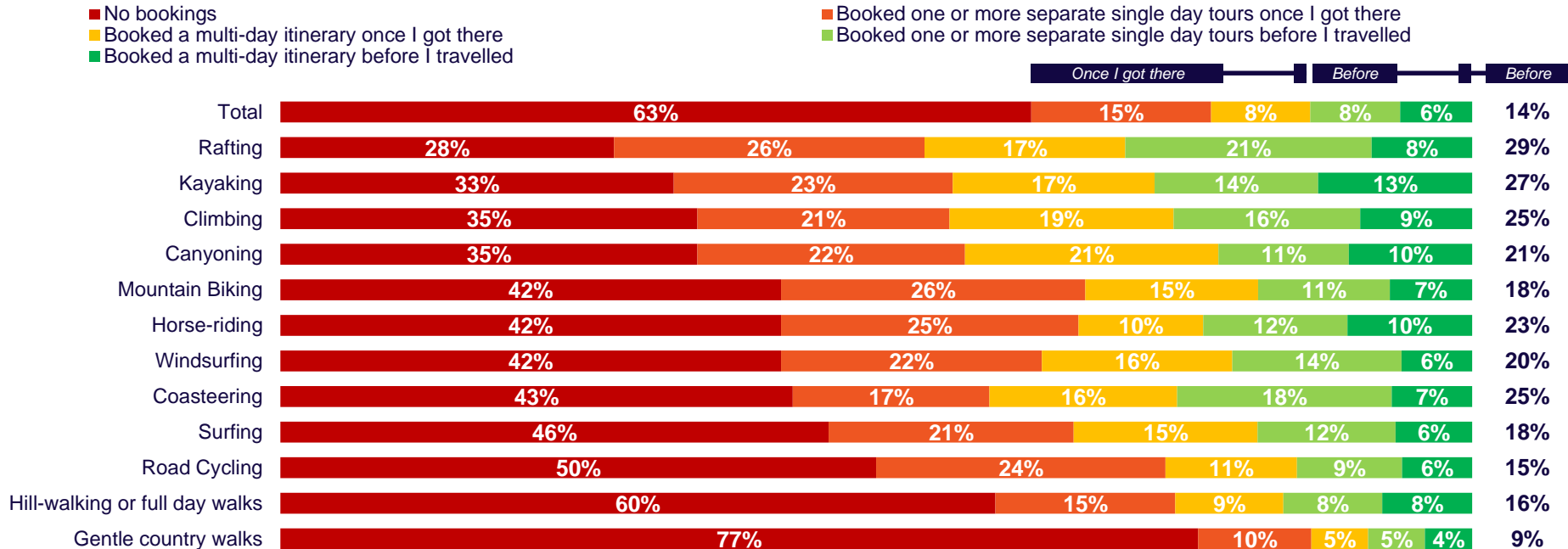
Q42. How would you make the bookings for the [Activity 1] elements of your trip?

Base: All respondents (n=2542)



Looking closer at booking of activities, **the majority of these occur after arrival** at the destination... bookings before travelling are generally less common

**HOW WAS MAIN ACTIVITY BOOKED? SCORES RE-PERCENTAGED VS. DIFFERENCE BETWEEN 100% AND 'NO BOOKINGS'**



Q24. How did you book the [Activity 1] elements / itineraries of your trip?

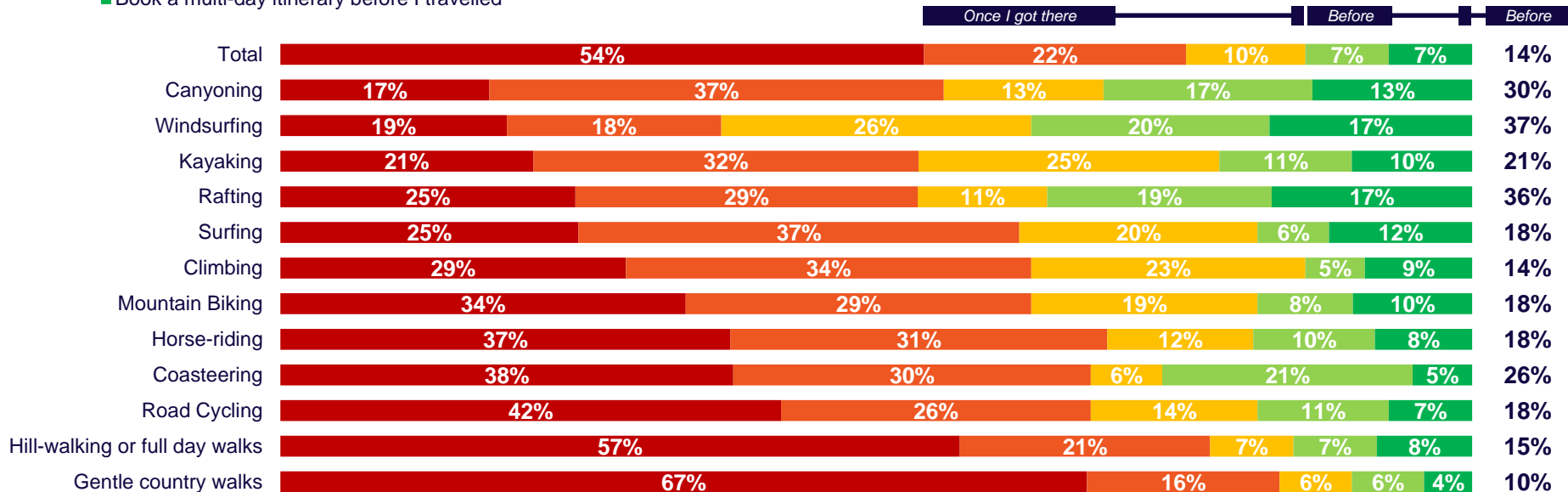
Base: All P3Y trips (n=6191)

Preferences when it comes to booking of activities on a future trip to England mirror current booking behaviour ... **activity bookings are most likely to occur after arrival**

HOW ACTIVITIES ON TRIP TO ENGLAND WOULD BE BOOKED

- Wouldn't make any bookings - just do them
- Book a multi-day itinerary once I got there
- Book a multi-day itinerary before I travelled

- Book one or more separate single day tours once I got there
- Book one or more separate single day tours before I travelled



Q42. How would you make the bookings for the [Activity 1] elements of your trip?

Base: All respondents (n=2542)

# Summary: Booking & Activities



1

## UK Activity Trips Are Relatively Booked

- But overall, it's still only a third of trips which involve a package booking of activity along with travel and accommodation. Road cycling and horse-riding are the activities most likely to have some element of booking



2

## Booking Is Related To Activity

- As we might expect, the most common activities (e.g. gentle country walking) are less likely to be booked than activities like coasteering or windsurfing



3

## Booking Happens After Arrival

- The majority of outdoor activities bookings occur after arrival at the destination, not before – only 14% of outdoor activities in England are expected to be booked before they arrive in England



Final thoughts

## Outdoor Activities & Visiting England

*“I want to include the whole thing – cycling, hiking, everything that has to do with outdoors and nature, and water.*

*Everything fascinated me. My impression of England has very positively changed, I would not have thought it to be like this - less nice is what I'd have expected!*

*When I see these images it's gorgeous, a dream. I'm enthused.”*

*- DE*



# Outdoor Activities & Visiting England

## **MOTIVATIONS**

Outdoor Activity Holidays satisfy a need to embrace freedom and the vastness of nature, and to try new things on holiday

## **CHALLENGE**

Much of what we have to offer is not high-profile so English terrain is a huge – but pleasant – surprise for these potential visitors

## **KEY ACTIVITIES**

The important activities to build appeal are walking/hiking, but also Mountain-Biking, Horse-Riding, Road Cycling, Kayaking (and for a smaller audience, other water sports)



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# Thanks

One Minute to Midnight & Maru/edr