



Visit England – English Destination Types

Understanding the Consumer – Research Debrief (condensed)

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Overview of the project.

Business and research objectives

To understand the motivations and barriers amongst consumers for taking short breaks and holidays in England across different life-stages

- with particular emphasis on coastal and countryside destinations

Establishing how to capitalise on the motivations and address the barriers



Provide intelligence at a national & local level to:

- i. inform campaign development as part of the “Growing Tourism Locally” campaign;
- ii. aid decision making at a local level to help support marketing activity and drive growth.

Audience, approach and location

3 extended workshops using a variety of enabling techniques, each lasting 3.5 hours

- segmented by life-stage; pre-family; family and empty nesters and mix of gender
- equal split of Committed and Shallows

Workshops held between 8th and 16th August





One: setting the scene

Unsurprisingly, but encouragingly, England features heavily in ideal holiday calendar.

A great short break with family and friends

Often have 2 or more breaks in England

Most imagine a winter break in England

Typically places already visited or more iconic places such as Cornwall, Devon, Lake District and Yorkshire Dales

However, often holidaymakers do not have strong or broad 'must go to' places beyond the familiar



A key challenge is broadening holidaymakers repertoires, and life-stage & location are more important to understand than segment

Destinations need to be compelling to merit travelling for several hours.

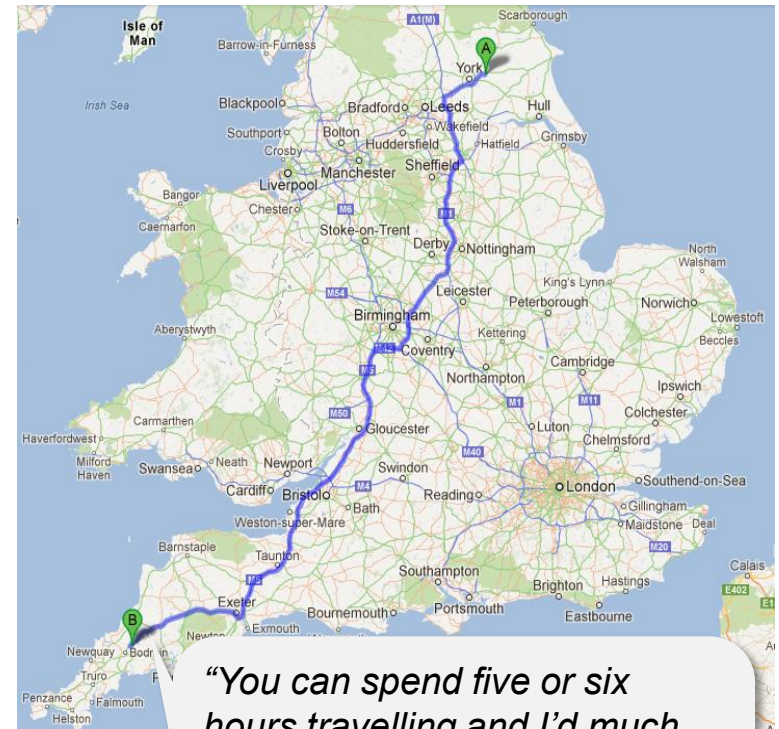
2 – 3 hours is preferred for a break

Easier to attract holidaymakers to places within this travelling distance

Only the more iconic and very compelling English destinations typically entice people further and for longer

- typically, Cornwall and Lake District, but also Devon, Dorset and Norfolk

Regional marketing is important for most places



“You can spend five or six hours travelling and I’d much rather be sitting on a plane with a drink in my hand.”
(York: Family)

England can offer the benefits of holidaying and more.

Breaks and holidays in England

Putting you in the 'break' mode

Quality time with partner, family and friends
(don't forget the dog!)

(Re-) discovery

"We haven't mentioned pets, and that's a huge plus for going on a holiday in the UK."

(London: Pre-family)

Supporting communication across destination types, in particular seaside and countryside

The 'local' to the area angle is appealing across segments and life-stage.

Creating destination distinctiveness

Local activities and events

Local produce, food and drink (specialties)

Mixing with the friendly locals

Independent shops, pubs etc



"Local butchers and bakers and little artisan shops."
(Derby: Empty Nester)



Holiday aspirations across the life-stages.



Pre family

Quality and special time with partner and friends across the country especially important.

While they want things to do as well as walking/ hiking, few looking for strenuous activity.

'Simplicity', fresh air and getting away from the London grind key.

A sense of indulgence (food) also coming through for some.



Family

Key priority is having enough for the kids to do, which can take planning.

Sharing experiences and learning about places and things e.g. nature etc is appealing.

Weekend breaks without the kids are also a desire and an occasional reality.



Empty

Relaxing with partner in peaceful, beautiful scenery is important.

Some want breaks with flexibility built in e.g. combine coast and countryside.

Some mention of pursuing hobbies such as golf, motor-biking.

Also quality time with relatives, and occasionally friends.



Two: The challenge for encouraging more holiday nights in the UK.

There are barriers for taking more holiday whether in England or not.

Money

Breaks and holidays compete with other expenditure, and another trip however economical costs money



"I don't really have the money for another break, unless it's staying with a friend."

(London: Pre-family)

Time

Breaks and holidays compete with everyday life; few feel they can go away spontaneously or use all their holiday allowance away from home; and it takes time to plan a trip



"I like to be around to look after my grandson, so I can't just go because it's nice weather."

(Derby: Empty nesters)

Weather

Poor and unpredictable weather in England a cliché, but it can make people think twice, esp about a holiday (week+) in England
However, weather is less of an issue for planned shorter breaks



Breaks and holidays in England are also not always an easy or cheap option.

Abroad can be easier and cheaper for certain types of breaks and holidays

Package and 'packaged;' breaks and holidays are not associated with England

"(With Groupon) I got a chalet in Cornwall for 5 days with 70% off, so I paid £140." (London: Pre-family)

The notion of last minute deals is far less common for breaks and holidays in England

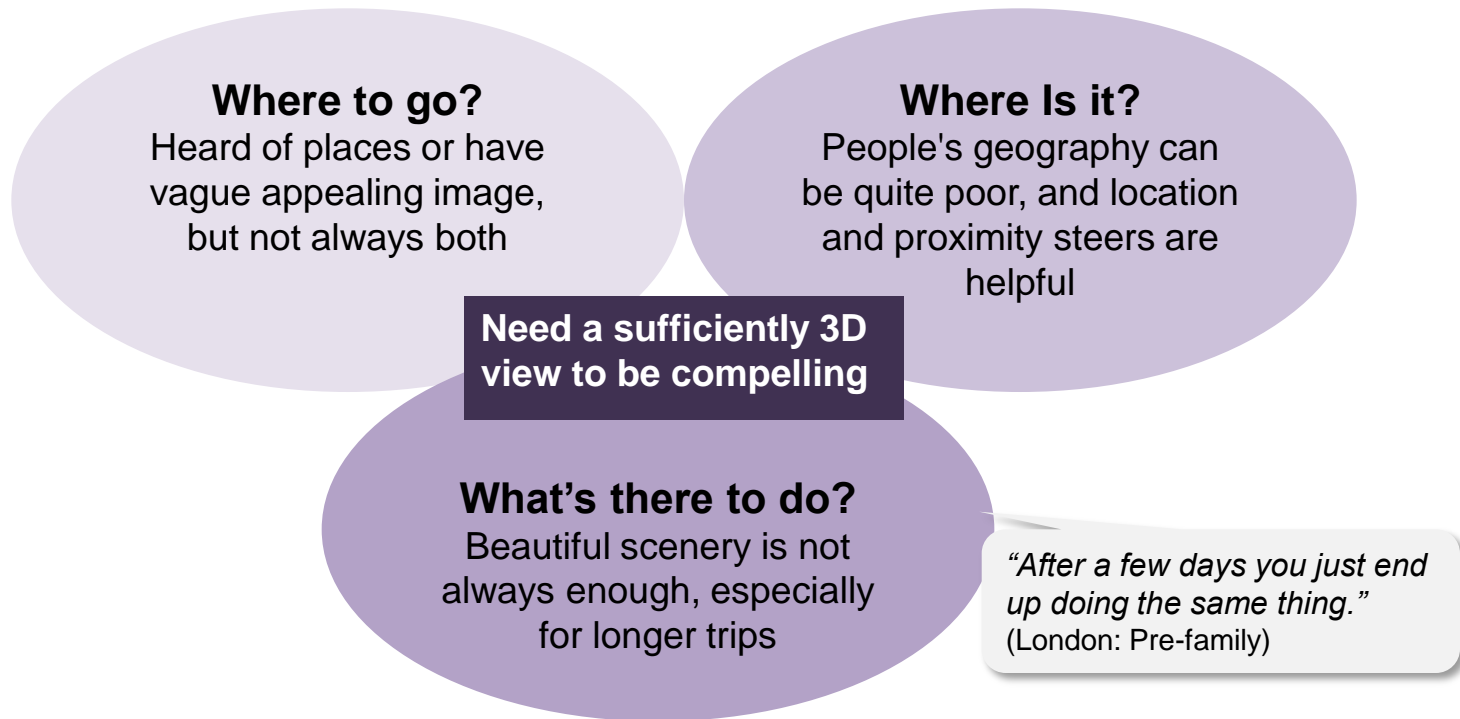
However, the key issue is inspiration and being inspired to make the effort and to find deals

Opportunity to raise awareness of relevant sites and remind people where to access information and planning tools

Know where to access certain deals and the Internet has made it easier, but sign-posting, reminders and tips are all welcomed

It's the inspiration that will encourage the investigation

Holidaymakers need inspiration and information.



Recommendation, experience (past trips, work, passing through, events etc) and a strong visual identity (media etc) are all key sources of inspiration

Lack of knowledge plus broad brush prejudices prevent consideration of much of England.

Lacking information and inspiration

Many simply *'don't know what they don't know'*

Committed and Shallows have a relatively narrow repertoire of places visited or wanting to visit

"Liverpool, Birmingham, Leicester triangle, is there anything there to see or do?"

(London: Pre-family)

"I think the majority of seaside towns in the UK are tacky apart from Cornwall."

(London: Pre-family)

"I was struggling to think of places I wanted to go to, because I don't know the country, what's all this in the middle I have no idea."

(London: Pre-family)

"(South East) The wrong kind of people – not for me."

(Derby: Empty nester)





Three: Destination themes

There are three sub-categories for both English Seaside and Countryside

English Coastal

Traditional English Resort/ town

- Piers, arcades etc
- Blackpool, Skegness

English Coastline

- Scenic long stretches
- Cornwall
- Northumberland

Seaside Towns and nearby coast

- Quaint and distinctive
- Filey, Salcombe

There is overlap between coastal and countryside

English Countryside

Dramatic Countryside

- Hills and lakes
- Lack District
- Peak District

Market towns & surrounding area

- Countryside with history & heritage
- Matlock, Bath

Rural Countryside

- Rolling landscape & picturesque villages
- Cotswold

Each has its own merits, but there are differences in appeal by life-stage

Traditional English seaside resorts are much maligned.

Typical perceptions are negative, but
there are some advocates

Strong prejudice exists, even
amongst families

More of a daytrip or 'ironic'
destination

But a few love the traditional
seaside

And some are gaining a wider

in Discovering an alternative side to complement the traditional image
seems key to unlocking their potential for a break/ holiday

*"Not Southend, purely because its full
of boy racers and slot machines."*
(London: Pre-family)

*"I don't like the trashy sort of
beachy place like Blackpool."*
(York: Family)

*"I love fish & chips, punch and
Judy and the arcades."*
(London: Pre-family)

*"Brighton is quite quirky, there's
another side to it."*
(London: Pre-family)



English coastline conjures up appealing imagery.

Actual destinations and activities less clear

Positive images of cliffs, long stretches of beaches and coast

Relatively remote so to be away from it all, but bays and fishing villages with local produce and seafood

However, often people don't know where they'd find it besides familiar places

Also not always clear about what to do to fill up a long break/ holiday

"It's not trying to cater for the masses – it just feels like you've gone away – it feels fresher and unspoilt."

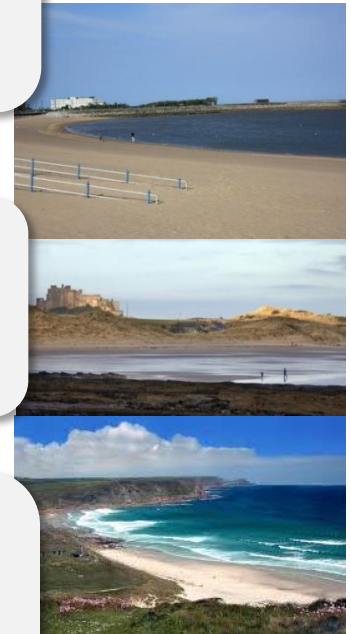
(London: Pre-family)

"Devon and Cornwall because you hear so much about the area"

(York: Family)

"I went to Northumberland last year and that was beautiful... there was a Castle and beaches were fabulous, and the cliffs."

(Derby: Empty nesters)



Towns that are a great base to explore the coast (& countryside) hold appeal.

Creates a sense of more to do

Like the idea of a base (coast or inland) that provides more options

Local history, places of interest as well as seaside and coastal pursuits

But once again, often people don't know beyond a few options of specific places that fit the bill

"You can do different things depending on how the mood takes you, and if you want the hustle and bustle or not."
(Derby: Empty Nester)



Real opportunity to promote coastline towns within 2 – 3 hours

Coastal has slightly different appeal across life-stages and home location.



Pre family

Poor awareness in London, results in many not knowing where to access the coastal escape outside of the South West, and not really thinking about seaside towns to explore from (Olympics has highlighted Weymouth).

Real opportunity to promote coastal towns closer to home.



Family

Very open to less traditional seaside towns that provide things to do without the tackiness.

Getting away from it all and modern life, back to simple pleasures is strong.

However, still scope to play on childhood memories and sharing them with the children



Empty nesters

A divide between those who want relatively remote rural escape where walking is sufficient activity, to those who want a town from which to explore

Once again, real opportunity to promote coastal places towns closer to home.

The English countryside

The unknown countryside.

A blurred picture despite evocative perceptions

Able to imagine appealing countryside images (when asked to visualise)

But the various sub-categories of English countryside are not top of mind

Don't always have a clear image of what they can do

Consider the countryside (Lake District aside) for a shorter break than for coastal destinations

They're also often unsure where to find this appealing countryside

"The countryside is just green and boring."

(London: Pre-family)



"Norfolk, the most boring countryside I've ever seen."

(York: Family)

There is rugged countryside sub-category, but its not always top of mind.

Almost iconic

A sense of being away from modern life

Lake and Peak District (also inland Cornwall) consistently come to mind, with the Dales in York and Derby

However, even here knowledge can be limited

"It's (Lake District) just so dramatic... Everywhere you go there's something to see."
(York: Family)



"It's an escape from the crowds (Dales) – remote ."
(York: Family)

Opportunity to add depth to people's images of these places and promote other options

Rural Countryside

The rural sub-category is idyllic, but needs to move beyond picture postcard.

Very pretty, but what can you do

Rural countryside and village life has strong appeal

Getting away from town/ city life, to something more quaint and slower

But the issue for many is what is there to do for more than a couple of days

Reinforce quality time with travel party and simple pleasures (drinks with friends, walks possibly cycling, board games etc) as important as activities

“Some of these places with their Tudor buildings, just turn out to be like any other town, the high street’s the same with their Greggs and WH Smith.”
(London: Pre-family)



“A stream, a pub with a bridge, and staying in an oaked beamed cottage.”
(York: Family)

“Having a barbecue with friends in the garden, drinking late into the night, games during the day, all very relaxing.”
(London: Pre-family)

Market towns can be more of a focus of the countryside for some.

Somewhere from which or near to explore

Empty nesters in particular, want a combination of things from the countryside

Empty nesters in particular, don't necessarily make a clear distinction between countryside and towns even cities or the coast

"I like to take in the scenery, the rolling hills and countryside, but also to explore the local markets towns and villages, to take in the architecture and maybe pick up some local food for dinner."

(Derby: Empty Nester)



"The idea of being somewhere too remote puts me off. I don't want to stay in a town necessarily, but it's nice to have the option to visit local shops if you want."

(Derby: Empty Nester)

The various countryside perceptions have differing appeal across life-stages.



Pre family

London factor means often they focus on rural escape away from it all.

It's as much about the quality time with friends as the location, thus activities are a supporting need not the primary focus.

Opportunity for them to reappraise the area just beyond the home counties



Family

Attracted to the notion of a rural escape; tranquillity and peace, but also things to do.

Dramatic countryside and strenuous activity felt to be aimed at older more active teenagers.

Market towns more somewhere to pass through than use as a base.



Empty nesters

Open to the various sub-categories of countryside, but market town feels more practical (Derby location?) by many with more for them to do.

Rugged scenery and remoteness appealing to some, but not necessarily being overly active.

Romantic heritage city breaks are not top of mind, but conjures up a compelling option.

Appeal that crosses all life-stages.

The idea of a break that can be enjoyed year-round works well



Eating out is one of main attractions of such a break.

Accommodation is a key element

Emphasise variety of activities rather than focus on niche interests.

City breaks are established territory, but English cities are not always top of mind.



Well understood, but appeal & relevance varies by life-stage

Greatest appeal amongst post-family group, many of whom are already taking such breaks

Pre-family(London) tend to prefer European cities

With the exception of London, more of a 'without the children' or 'with older children' break for family life-stage

English cities need to focus on their individuality, as a generic English city break is not sufficiently compelling in its own right

Moving forward.

Encouraging more holiday nights in England

Create a vivid, 3D perception of destinations to achieve a compelling call to action

- create the impression that there's sufficient do (rain or shine) to merit an extended break or holiday, which is easier for coastal destinations

Developing sub categories and thematic campaigns for both coastal and countryside is important

- also worth highlighting the 'local' angle

Capturing the experiential and emotional side of taking a break or holiday is important, with strong value in tapping into the benefit of sharing quality time with partner, family (extended) and friends, and don't forget the dog



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