



# Visit England – English Destination Types

## Understanding the Consumer – Research Debrief

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# Background and objectives.

## Background and business objectives

VisitEngland's role is to grow the value of tourism by working in partnership with the industry to deliver inspirational marketing campaigns and to provide advocacy for industry and visitors.

Qualitative research on consumer needs and perceptions is now required to provide intelligence at a national and 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.

## Research objectives

Establish Committed's and Shallows' perceptions of and behaviour across various English destination types

- in particular, coastal and countryside, but also heritage towns and cities

To determine the motivations for trips across these destination types and how to capitalise upon these

To determine the barriers for trips across these destination types and how to address them

To gauge initial reactions to 8 potential thematic campaigns

To identify any significant differences by segment and/ or life-tsage

# Who we spoke to what we did.

## Audience and approach

3 extended workshops lasting 3.5 hours

- segmented by life-stage; pre-family; family and empty nesters and mix of gender
- equal split of Committed and Shallows
- two sub groups in each session, one focusing on coastal and one on countryside

Workshops comprised various task and activities including:

- pre-task of recent & ideal holiday calendar
- destination associations
- Room 101 and Wish List
- guided visualisation and storytelling
- presentations
- review of thematic campaigns

## Locations



Workshops held between 8<sup>th</sup> and 16<sup>th</sup> August



# One: setting the scene

# Holiday repertoire: Committed and Shallows

# Our holidaymakers are taking a diverse range of breaks and holidays.

## Holiday behaviour across segments

Our Committed are typically taking fewer holidays than our Shallows

- as a result some Shallows are spending as many nights in England as our Committed

As expected, Committed are more likely to be taking longer holidays in England

- Scotland and Wales also feature more heavily amongst Committed
- very few are taking week+ holidays in England
- some England only Committed but still an appetite for foreign travel

As found in previous research Shallows can visit a more diverse range of destinations

*“My holidays are abroad and my breaks are in England.”*  
(London: Pre-family - Shallow)

*“Now the kids are grown up, I prefer to stay in England.”*  
(Derby: Empty nester - Committed)

# There is as much diversity by life-stage as by segment amongst our holidaymakers.

## Holiday behaviour across life-stage



*Pre family*

More likely to take foreign city breaks than other life-stages

Weddings, visiting friends & relatives can influence choice of English destinations

Still taking holiday breaks with relatives, particularly in England



*Family*

1 to 2 week summer holiday is more common place

More likely to return to the same places



*Empty nesters*

England is a more frequent destination across both segments

More likely to be taking week+ holidays in England

Still holidaying with adult children on occasion, particularly in England

# Home location can affect choice of destination in England, especially for shorter breaks.

## Destinations are in part influenced by proximity and environment

Derby & York are both locations with popular areas of natural beauty nearby

- Peak District and the Yorkshire Dales can be accessed without great effort
- visiting the local area is more pronounced with our Derby empty nesters, but they go further afield too

The pre-family in London are travelling much further afield

- living in London puts pressures on people to truly escape and many feel that the 'local' countryside such as Kent and Hertfordshire are not far enough away to truly 'get away from it all'
- many don't know the country between these places and more iconic places they tend to favour such as the South West and the Lakes

Road infrastructure and time to get places is also a factor

*"Norfolk isn't that far away, but the roads are so small and it takes ages."*  
(Derby: Empty Nester)



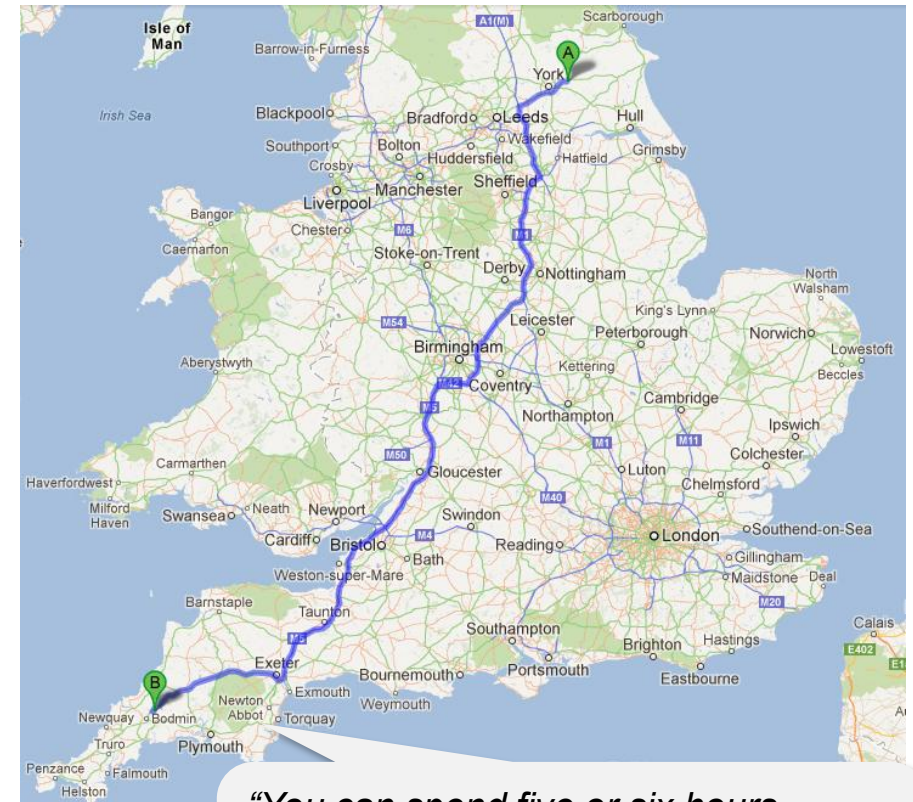
# Destinations need to be compelling to merit travelling for several hours.

## 2 – 3 hours is preferred for a break

Holidaymakers across the board feel it would be easier to attract them 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
- but the investment of time necessary for some people to travel there is a barrier



*“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)

Regional marketing is important for most places

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

## A great short break with family and friends

Committed, but also many Shallows often have 2 or more breaks in England

- Shallows more likely to still want a week or longer trip abroad between May and September, whereas Committed prefer to be in England during this period

Most imagine a winter break (Dec, Xmas and Feb) in England

- interestingly, Shallows are keener to make this a longer break

The destinations mentioned in ideal calendars and in wish lists are 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**



# England in context: barriers and motivations

# There are some aspects of breaks and holidays abroad which are 'unique'.

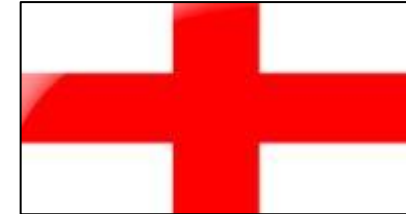
## Abroad



Exotic destinations and other activities such as skiing



## England



Doesn't and can't have the same allure, especially for pre-family, even if the English break and holiday can be very enjoyable/ restful

The archetypical beach/ by the pool Med (or further afield) holiday



English seaside holidays can't offer the same weather guarantee, but they can offer something more than just lying in the sun

There's still cachet about going abroad, especially for a holiday. With the stereotype of England as the poor or unadventurous person's options



However, it's more of a barrier for not exclusively holidaying in England than a real barrier for either Committed or Shallows

# The weather is a push factor for holidays abroad.

## Unpredictable weather can drive people to warmer climes

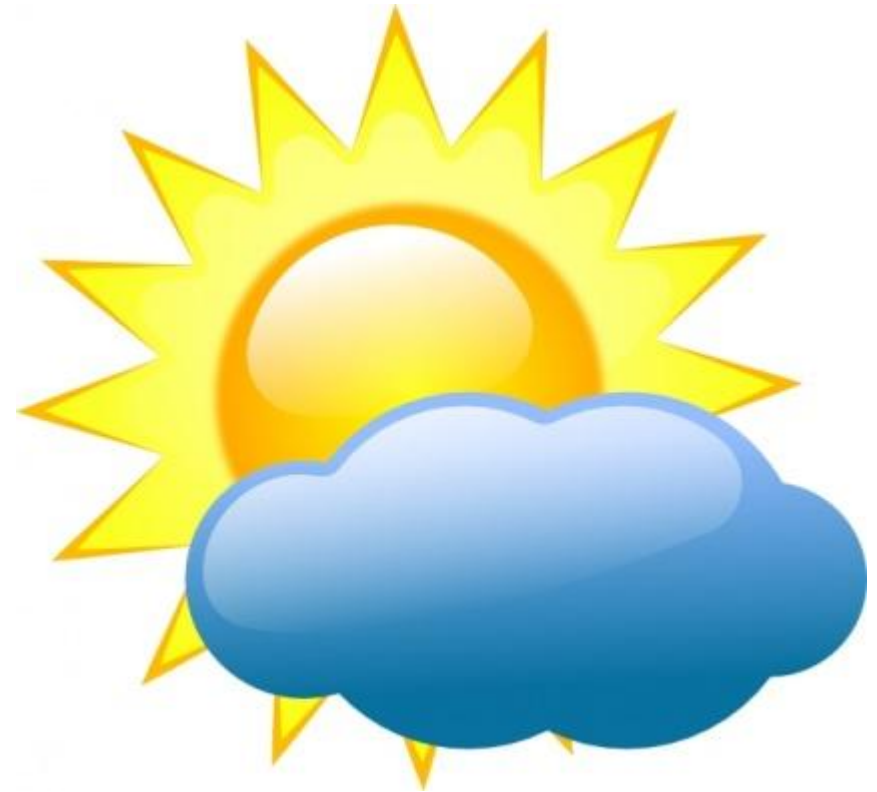
Poor and unpredictable weather in England can be acknowledged as a cliché, but it can make people think twice about a holiday (week+) in England

- one less thing to be concerned about
- more of an issue for Shallows than Committed

Some individuals are simply sun (heat) worshippers that need their 'fix' on a regular basis

However, weather is less of an issue for shorter breaks

- cf winter breaks in ideal holiday calendar
- need to remind people there is much to do and enjoy when it rains



# England can still offer the benefits of holidaying and more.

## Breaks and holidays in England

Putting you in the 'break' mode

- a rest/ getting away from it (all), a slower pace etc

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

- a strong emotional pull to be utilised for promoting breaks and holidays in England across all life-stages
- also sharing past holiday experiences across generations

*"We haven't mentioned pets, and that's a huge plus for going on a holiday in the UK."  
(London: Pre-family)*

(Re-) discovery

- English holidays offer the familiar yet something different; new places and activities, different things to do and experiences
- revisiting childhood places for a few

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

- things you can't or wouldn't do closer to home
- everything from fêtes to country shows through to local traditions

### Local produce, food and drink (specialties)

- especially seafood for coastal
- enjoying good produce and food is increasingly key to holidaymakers and England is felt to be improving

### Mixing with the friendly locals

- without the language barrier

### 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 nesters*

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 two key 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

Not everyone can afford to spend much more on their leisure time

*"I don't really have the money for another break, unless it's staying with a friend."*  
(London: Pre-family)

*"I'd love to take the kids where I used to go in Devon on the train, perhaps when they're older. I don't have the money and I can imagine it being quite a lot."*  
(York: Family)

## Time



Breaks & holidays compete with everyday life; few feel they can go away spontaneously or use all their holiday allowance away from home

Takes time to plan a trip, especially if going somewhere different

*"I like to be around to look after my grandson, so I can't just go because it's nice weather."*  
(Derby: Empty nesters)

# 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

- they make organising a trip easier and the cost cheaper or more 'contained', esp for families
- some across all life-stages would prefer to travel by train if it were cheaper

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

- savings whether for travel or accommodation come from planning ahead

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

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

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

# An idea.

## Is there potential for? . . .

Greater cooperation between providers of travel, accommodation and attractions to offer combined deals

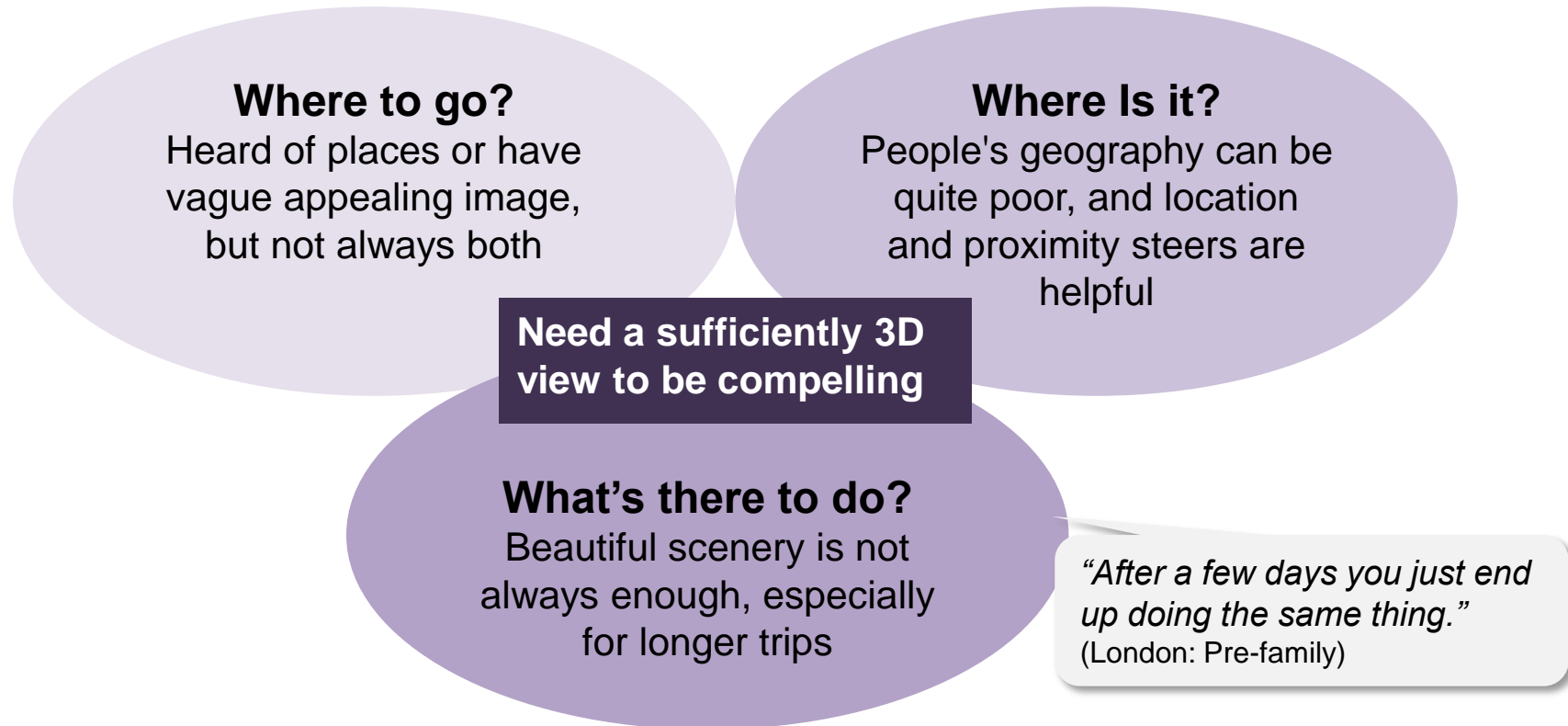
- to deliver inspiration while creating the sense of a cost effective package/ solution with less effort
- create extended break and week long deals, not just day trip offers

Clearly this should be accompanied by joint marketing

- e.g. National Trust and train operator deals mentioned for bringing ideas to the fore



# 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'*

- large swathes of the coastline and countryside are unfamiliar or not expected to be appealing
- patchy awareness even amongst the self proclaimed more knowledgeable empty nesters

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

- and often only have a vague perception of not yet visited wish list places

*"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)

*"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)

*"(South East) The wrong kind of people – not for me."*  
(Derby: Empty nester)

# A source of inspiration and information.

## Promoting Visit England and other sites

Although not a focus of this research, consumers feel there is no central resource to search for inspiration and information

- destinations, activities, accommodation etc with additional links

Visit Scotland and some regional tourist sites are far more top of mind than VisitEngland/ Enjoy England

Planning tools seem worth pursuing

- e.g. broad itineraries to show that you can spend more than a few days in any place
- nearby places for excursions and daytrips whilst on a break or holiday
- activities (all levels of exertion from the familiar walking to more active kayaking or unusual such as frisbee golf) and events



# A few more words about the weather.

## Still lots to do and enjoy if it rains

Lists/ reminders of wet weather activities, especially low cost is useful

- don't forget money off vouchers

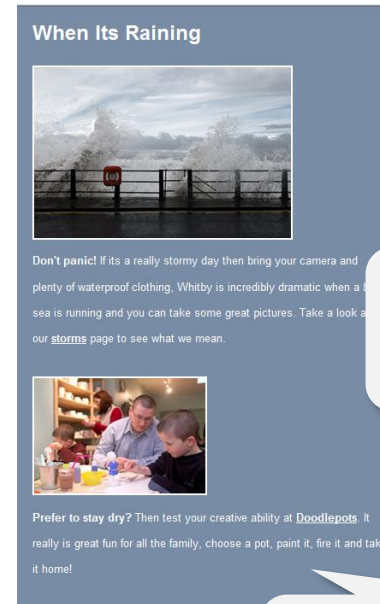
If your dressed appropriately it's still fun to be outside

Fun to be had inside

Add a sense of humour

- the English know you can't count on the weather

It's about the quality time together



**When Its Raining**

Don't panic! If its a really stormy day then bring your camera and plenty of waterproof clothing. Whitby is incredibly dramatic when a sea is running and you can take some great pictures. Take a look at our [storms](#) page to see what we mean.

Prefer to stay dry? Then test your creative ability at [Doodlepots](#). It really is great fun for all the family, choose a pot, paint it, fire it and take it home!

*"No such thing as bad weather, just bad clothing."*  
(York: Family)

*"We had jigsaws and scrabble and it was brilliant."*  
(York: Family)

*"If it rains chill out, bake a cake."*  
(York: Family)

*"Mention a pub and everyone's' happy."*  
(York: Family)





## 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

# The English seaside and coast

# Traditional English seaside resorts are much maligned.

Traditional  
English  
Resort/ town

Typical perceptions are negative, but there are some advocates

Strong prejudice exists, even amongst families

- tacky and dated, faded and dirty but possibly cheap

More of a daytrip or 'ironic' destination

But a few love the traditional seaside

- recapturing childhood memories for younger and older

And some are gaining a wider image

- e.g. Brighton & Bournemouth

*"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)



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

# English coastline conjures up appealing imagery.

## Actual destinations and activities less clear

Positive images of cliffs, long stretches of beaches and coast

- (long) walks, beach combing or just sitting on the beach; a slower pace of life

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

- Cornwall and Devon dominate
- Northumberland to a lesser extent for those in Derby & York

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."*

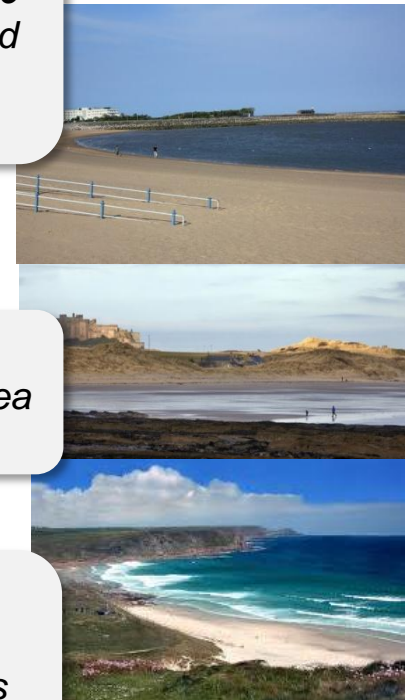
(London: Pre-family)

*"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

- different types of walks and things to explore and do

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

- more places to visit and eat etc

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

- all too often unsure of places that are not too far from home

*"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.

# Capturing the feel of a coastal break or holiday.

## Some things people said

The effects will last longer than the holiday itself!  
(London: Pre-family)

The coast deserves longer – how am I going to fit it all in?  
(Derby: Empty Nesters)

It's not what you do, its who you do it with!  
(York: Family)

Good company costs nothing.  
(York: Family)

Spend time with the people that matter.  
(London: Pre-family)



# The English countryside

# The unknown countryside.

## A blurred picture despite evocative perceptions

Holidaymakers can imagine appealing countryside images (when asked to visualise)

- pre-family most likely to struggle

But the various sub-categories of English countryside are not top of mind as their coastal equivalent

- and it's too easy to think about less than appealing images of industry and 'bland' landscapes

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

- pre-family most likely to feel it's boring

Across all life-stages more likely to 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

- rugged can be more associated with Scotland even Wales

However, even here knowledge can be limited

- heard it's beautiful, but don't always have a strong visual image or even where they are (Cornwall aside)
- also need broader perception of the landscape, as appropriate

*"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

# 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

- especially for pre-family who want to get away from it all (London factor?)

Rolling hills and forests come to mind for some

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

- imagine staying in cottages and farm houses, or manor houses for the more extravagant
- life around the pub and independent shops

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

- rural life, but also somewhere for shops and local museums, architecture, more eating and drinking options etc
- empty nesters also more likely to think of stately homes, monuments and gardens

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

- talk about day trips to larger towns and cities as part of their trip to the country

*"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*

Rural escape theme hits the nail on the head. Welcome the 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.

# Capturing the feel of a countryside break or holiday.

## Some great things people said

Getting back to basics.  
(London: Pre-family)

I wish I could live there.  
(Derby: Empty Nesters)

Try something new at the weekend.  
(Derby: Empty Nesters)

'Our countryside is still so beautiful, even if the weather is \*\*\*\*\*!'  
(York: Family)

*The kids love puddles!*  
(York: Family)

*Nature – England's play park!*  
(York: Family)

There are so many surprising and unusual activities  
(York: Family)

Come home relaxed and rejuvenated.  
(Derby: Empty Nesters)

# Other themes



# 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

# In summary.

## The need for inspiration and information

Within the confines of available time and budget Committed and Shallows are open to spending more of their holiday time in England.

Lack of knowledge and inspiration combined with the additional effort of planning for new places encourages holidaymakers, in particular Committed to go back to the same places.

Holidaymakers need a vivid and 3D perception of destinations to be a compelling call to action. They also need to feel there's sufficient do (rain or shine) to merit an extended break or holiday, which is easier for coastal destinations.

The opportunity to encourage additional breaks is strongest for destinations within 2 – 3 hours.

Promoting VisitEngland together with the tools that help planning and reminders of how to access good deals extremely useful.

# Moving forward.

## Encouraging more holiday nights in England

Developing sub categories and building on the thematic campaigns for both coastal and countryside is important to help create vivid and 3D perceptions across the destination types.

- the notion of towns and places from which to explore the coast or/ and countryside adds a further dimension
- also worth highlighting the 'local' angle

Capturing the experiential and emotional side of taking a break or holiday is also important.

There is strong value in tapping into the benefit of sharing quality time with partner, family (extended) and friends

- and don't forget the dog

Greater collaboration between providers of the various elements of a break or holiday to provided 'packaged' solutions should help overcome the barriers of effort and cost.



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