

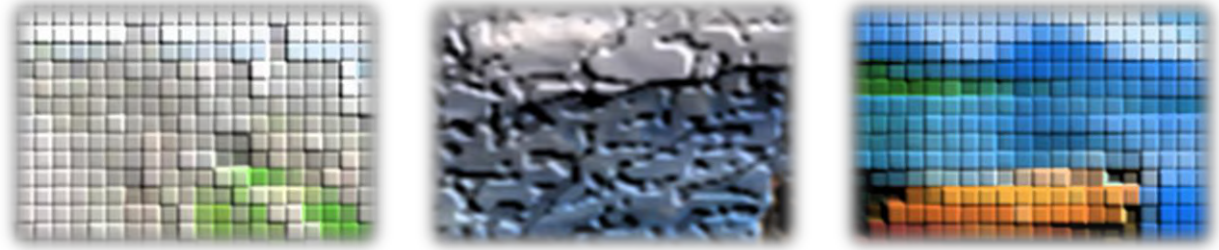
Project Lion

Deriving a product-centric tourism segmentation for VisitEngland using existing data

February 2,
2016



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Agenda...

BACKGROUND AND METHODOLOGY

FIVE SEGMENTS – AN OVERVIEW

PEN PORTRAITS – A SNAPSHOT

CONCLUSION

NEXT STEPS

Background & Objectives

VisitEngland wished to look at a segmentation of domestic tourists based on different needs, attitudes and behaviours to help prioritise future marketing and product development activity

Before commissioning any new research, the organisation wished to review existing data. This exercise would enable a sense of whether this type of tourism segmentation might be (a) possible, and (b) useful to VisitEngland.

Two data sources are available and have been considered as part of this investigation:

1. *The TNS Brand & Advertising Tracking Dataset, containing a total sample size of N=25,173 English tourists¹ spanning October 2009 through to March 2015;*
2. *The 'Project Jack' Quarter 1 data-set (April 2015 – end June 2015) of N=2,500 Great Britain tourists (slightly different tourist definition).*

The former of these alternative data sources was deemed most relevant, as questions around self-stated tourism drivers were included and the data-set was significantly larger.

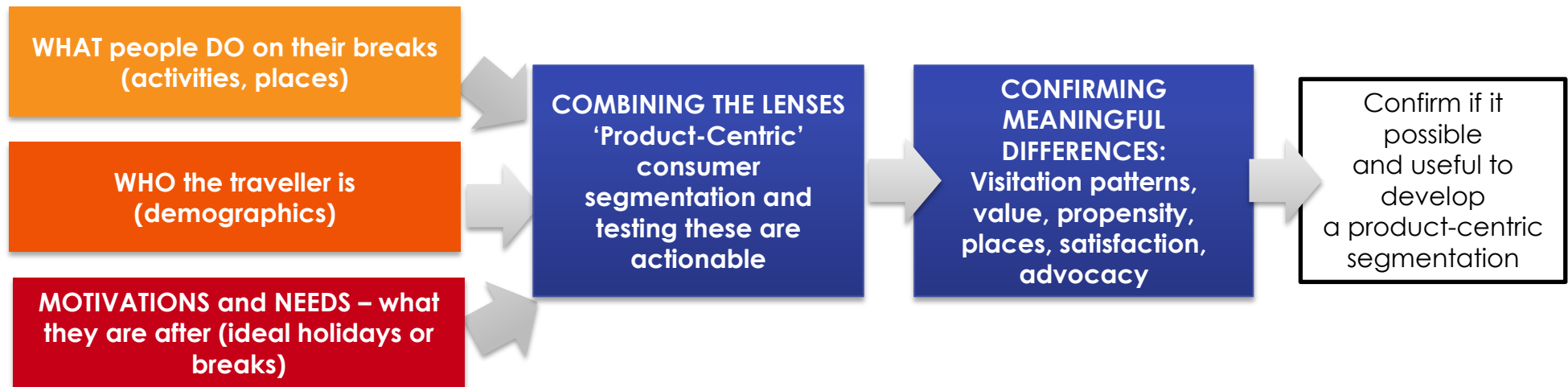
It is important to note that neither data source had been designed with the intention of developing a segmentation, so it was acknowledged there would be constraints and deficits, but that these could be built upon over time.

¹Stayed in paid accommodation in past 12 months and planning to stay in paid accommodation in next 12 months and open to holidays in England.

Framework for Consideration

In order to develop and leverage a strong portfolio of 'products', we need to start with a hypothesis that different people want different things from their domestic holiday or short-break destinations.

To explore this hypothesis in depth, we began by looking at three different lenses:



The aim of this presentation is NOT to go through the technical aspects of this process, but to briefly illustrate the first three lenses, then focus on sharing the final 'test' segmentation and testing its applicability to answer the ultimate question.

The WHAT lens

WHAT people DO on their breaks
(activities, places)

Based on:

- Activities undertaken on last trip (Q44)
- Type of accommodation stayed in (Q45 and Q45a as proxy for places likely to normally stay)
- Type of break (e.g. seaside, touring, etc – Q43)

Note, we did NOT use actual destination visited (Q46) in this approach, as we found that it was influenced by geographic proximity, but more independent of the above variables. Given we wanted this to be truly *product-centric* and not *geographic-centric*, and knowing it weakened the explanatory power of the solution, we left it out of the analysis as an **input** variable.



Produces 9 'segments', which are highly discriminatory.

They discriminate most strongly on (in order):
What is important to them, type of holiday, main destination*, type of accommodation,
needs/motivations (what is important to them), advocacy, experience rating.
In addition, they are discriminating on all key demographics.

*even though it wasn't an input variable, it was still discriminating as a profiling variable!

The WHO lens

WHO the traveller is
(demographics)

Based on:

- Gender (S2)
- Lifestage (Q65, Q67)
- Age (S3)
- Income (Q68)
- Social class (Q64)
- Region (S4)



Produces 10 'segments', which are highly discriminatory.

They discriminate most strongly on (in order):
Age, Needs/motivations (what is important), social grade, employment, income, children in household, marital status, destinations visited recently.

A further list of more than 10 variables of actionable interest are also discriminating.

The WHY lens

MOTIVATIONS and NEEDS – what they are after (ideal holidays or breaks)

Based on:

- Type of holiday normally preferred (Q15)
- What is important in a holiday or short break (Q51a)



Produces 8‘segments’, which are highly discriminatory.

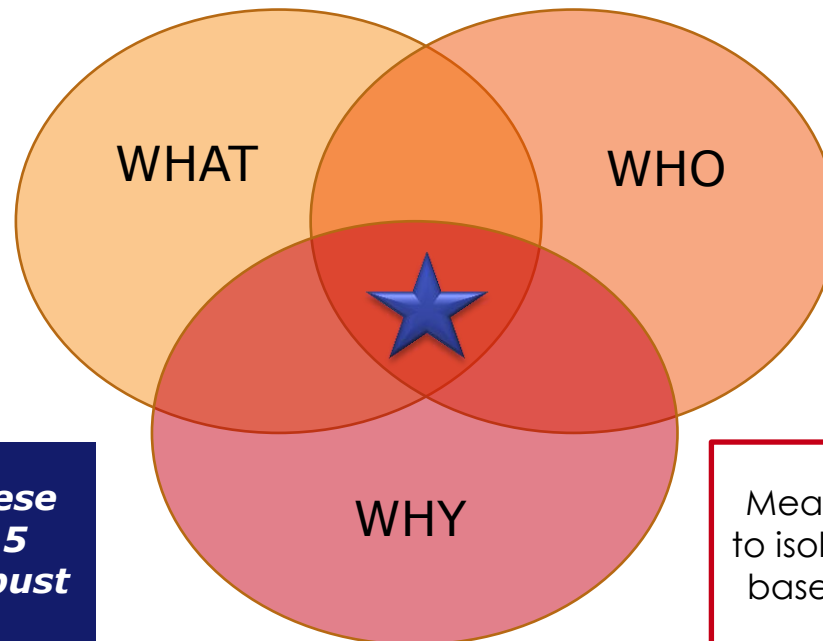
They discriminate most strongly on (in order):
Needs/motivations (what is important), destinations visited, type of holiday, social grade, employment, income, type of accommodation, age.
A further ten variables deemed actionable also highly discriminating.

What does all of this MEAN?

It means good news!

1. It means that demographics and psychographics (needs/motivations) and actual behaviour are all highly correlated
2. It means the 'ideal' combination will deliver us something actionable, meaningful and discriminating

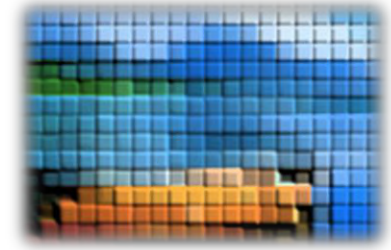
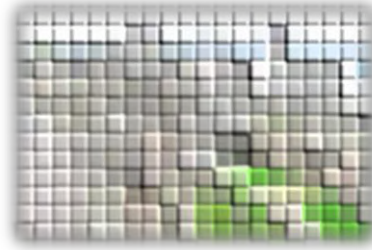
Robust, as it explains different behaviour, likely future behaviour and value contribution



Useful to directly find and target the audience

So next, we combined these three lenses to identify 5 manageable and more robust segments

Meaningful, as it allows us to isolate different product-based motivations/needs



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FIVE segments can be produced by combining the lenses

Discriminate on the key dimensions of interest (in order):

- **Needs & motivations**
- **Type of break**
- **Destination visited**



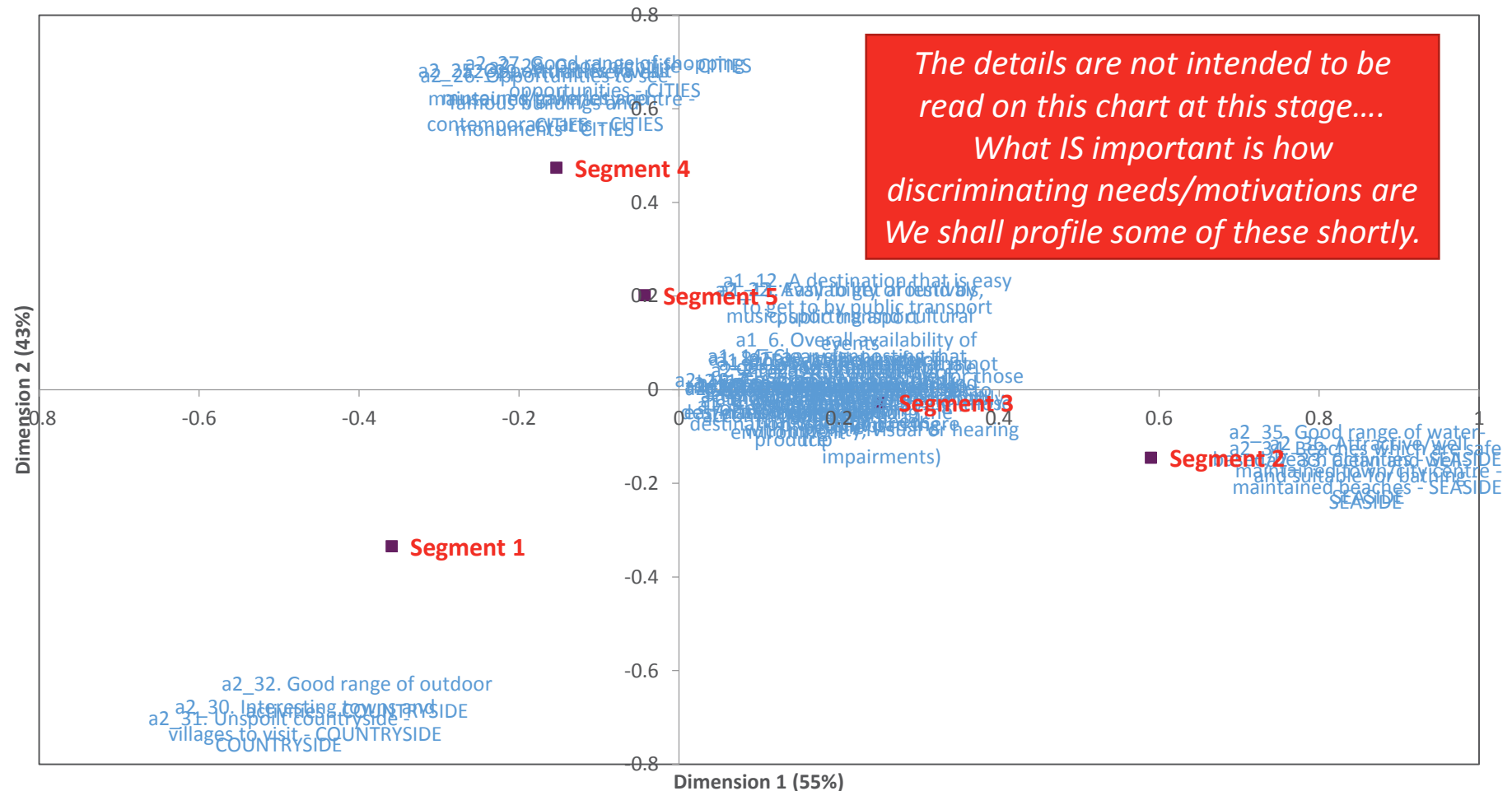
Deemed most relevant to the objective of determining whether a product-centric segmentation could be derived

- Social grade
- Age
- Media used
- Employment
- Income
- Children
- Accommodation type
- Region
- Marital status
- Experience rating
- Gender
- Propensity to revisit

Essential for reaching these segments as well as for anticipating different levels of return on tourism investment (value)

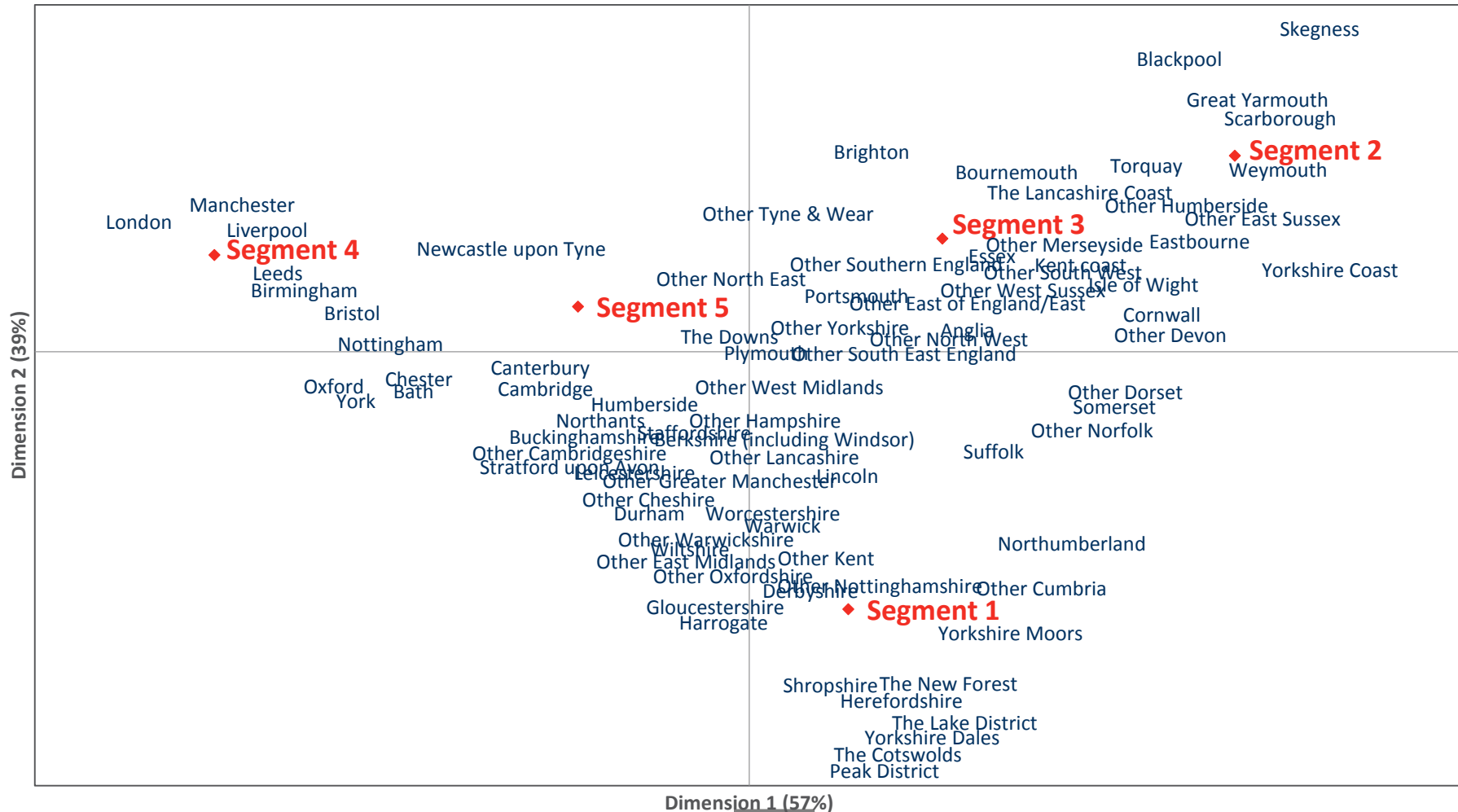
Visually and statistically – we can definitely target by what is important

What is important by segment



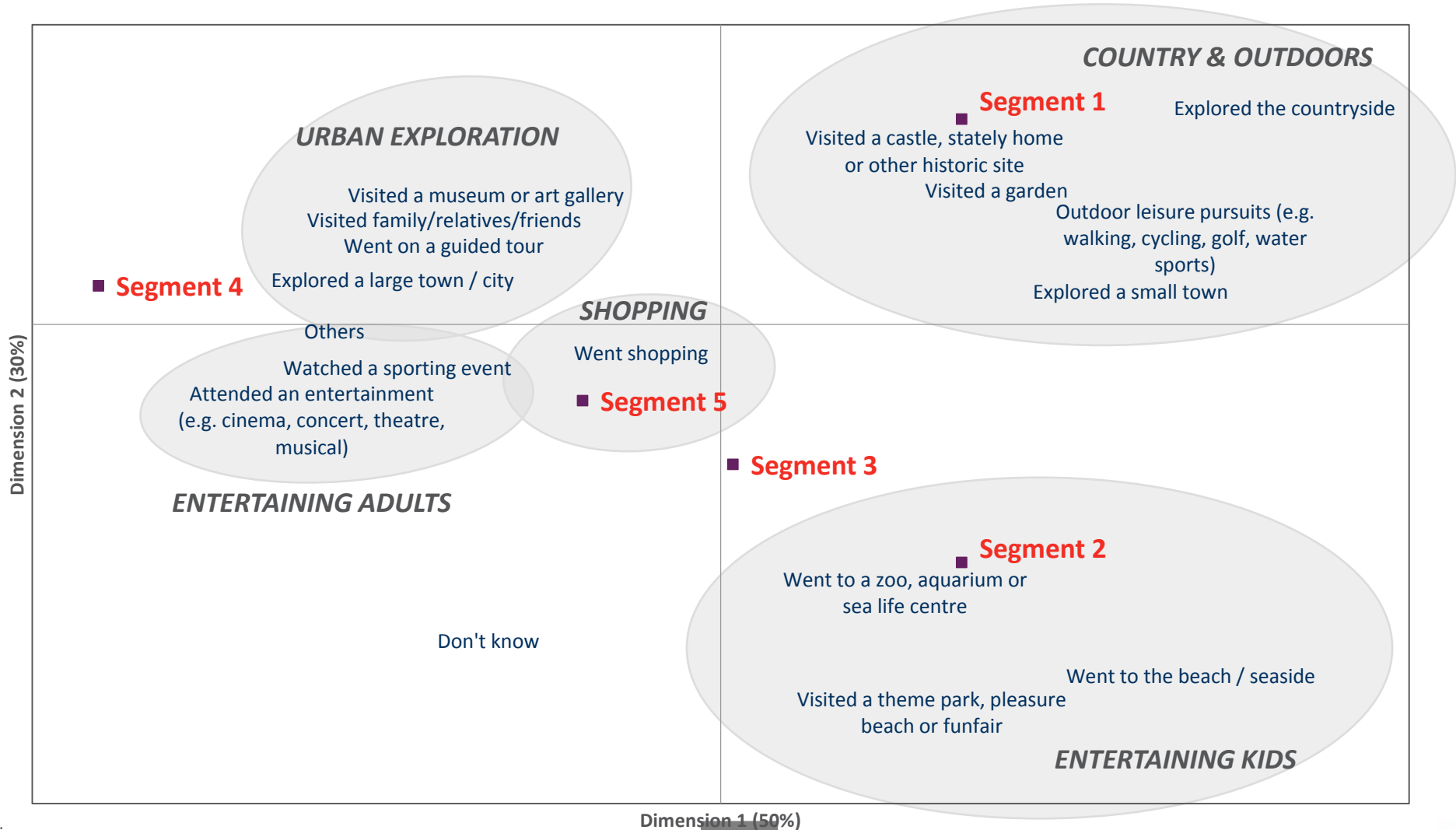
Destinations differ quite significantly

Destination of most recent visit by segment



As do the activities they take part in.....

Activities Undertaken on last holiday or short break



Q44.

Base All respondents – holiday in England, Segment 1 n=5512, Segment 2n=3530, Segment 3 n=1962, Segment 4 n=4323, Segment 5 n=1931

By continuing to profile we learn who they are and can assign them 'working names' and estimate size (people)

5. ASPIRATIONAL FAMILY FUN

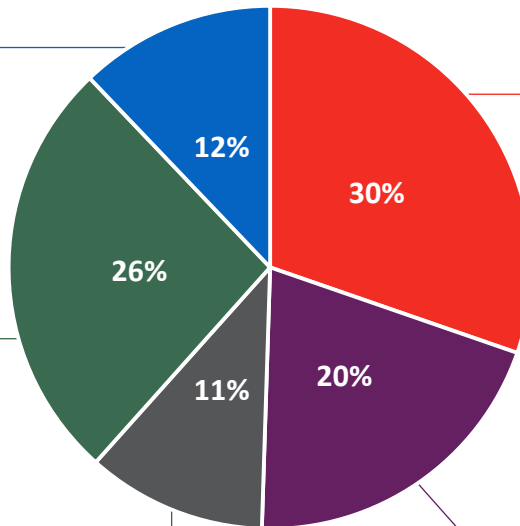
Typically information-hungry, London-based high earners with children at home, they regularly take city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits.

4. FREE AND EASY MINI-BREAKERS

More likely than other segments to be 'young, free and single'. Demographically close to 'the average Joe', but they really stand out in their holiday behaviour.

3. FUSS-FREE VALUE SEEKERS

Empty nesters on a budget, they seek good value beach holidays with convenient transport links. Tend to be less digitally active than other segments – less likely to engage in social media or book holiday online.



1. COUNTRY-LOVING TRADITIONALISTS

Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN

Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.

Deep dive into 3 key areas

1. DEMOGRAPHICS

- Age
- Gender
- Children in household
- Income

2. BEHAVIOUR

- Frequency of holidays taken in England
- Typical holiday activities

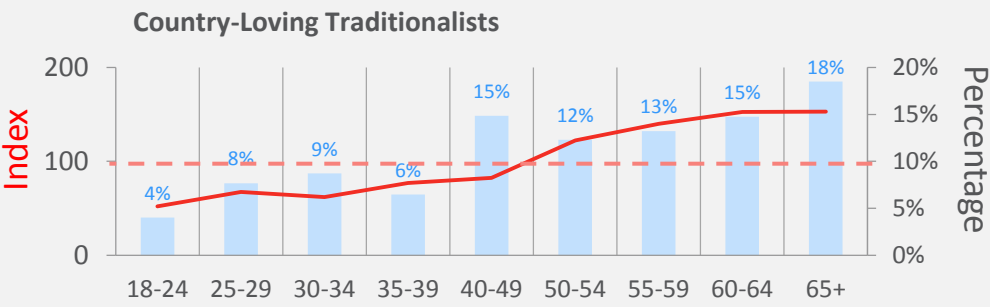
3. ATTITUDES

- Openness to holidays in England
- Openness to holidays in other countries

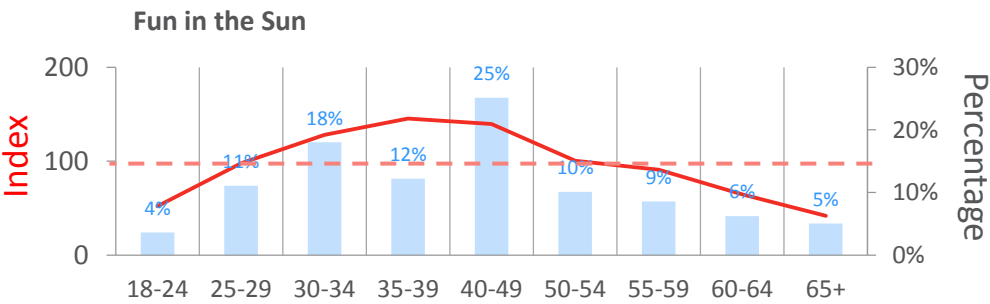
Profiling our segments: AGE

When profiling our segments we are interested in both the skews and the size of the demographics within the profiles. A large skew that represents a little size, may not be as useful.

In the below, we chart two overlapping figures. The red line represents an INDEX of how much this segment skews on a. An index score of 100 means the proportion is in line with the average across all segments. An index score of 200 means it is twice as likely to be in that age group, and a score of 50 means it is half as likely. The absolute percentages (SIZE) are shown as blue bars.



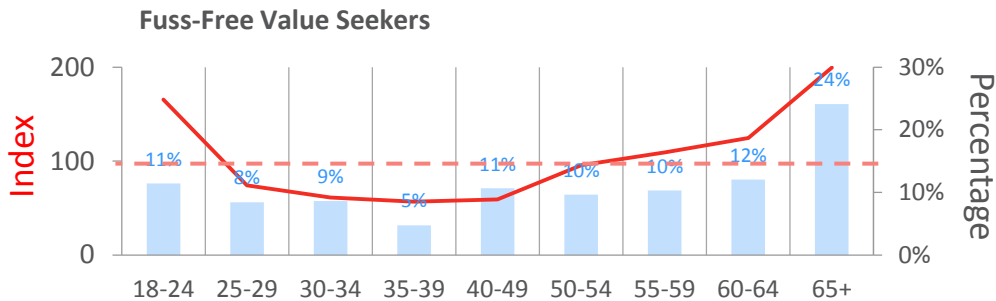
This segment skews older, particularly over the age of 50. Over 50's represent 56% of their profile vs. 41% for the average.



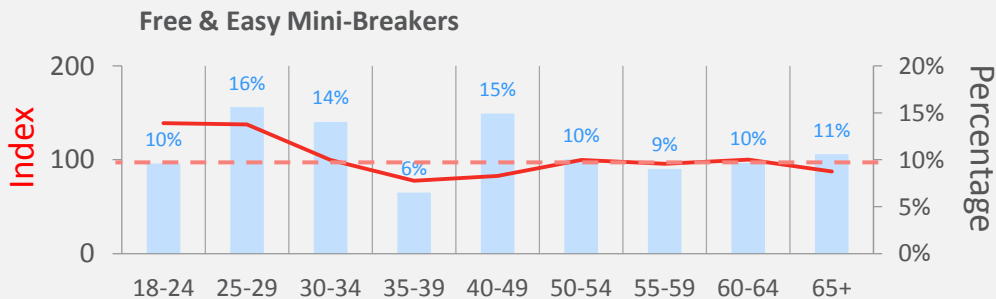
This segment skews higher in the 30-50 age group (ie: the age group where mums are most likely to have kids!). The 30-50 group represents 55% of this profile vs. 40% average.

S3.. Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.

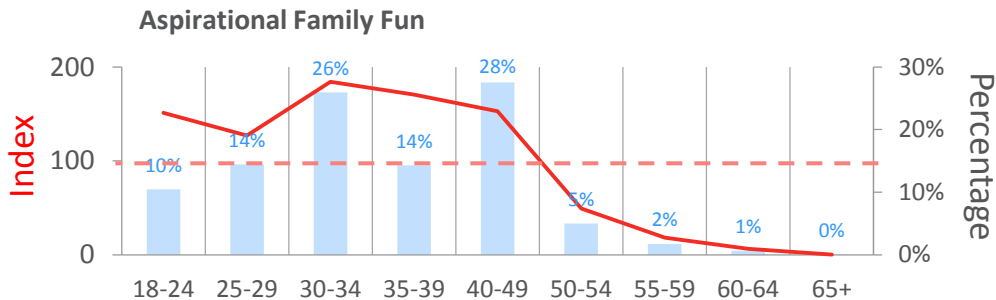
Profiling our segments: AGE



This segment splits on age – there are a higher proportion of under 25’s and a higher proportion over 65 – likely reflecting the dominance of “budget” in their lifestyles: students and retirees



This segment doesn’t skew particularly highly on age. There is a slight skew towards the under 30’s.



This segment very much is under 50.

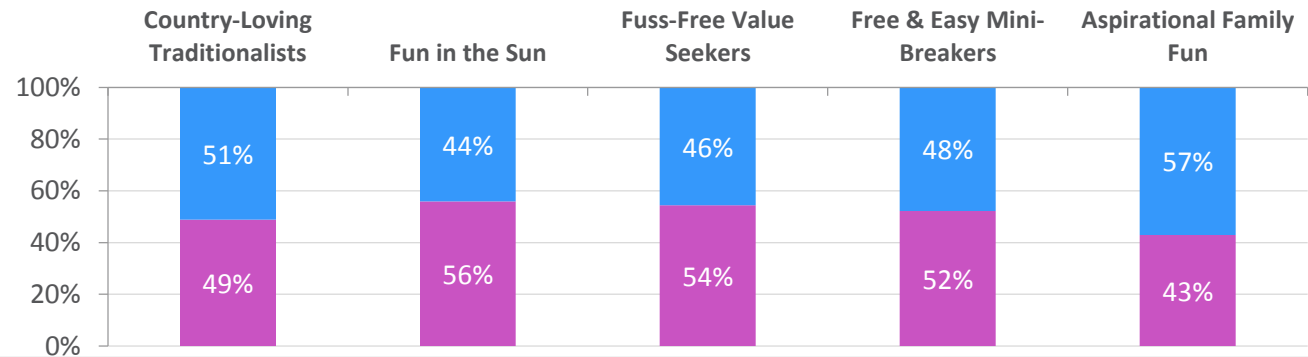
S3. Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.

Profiling our segments: GENDER

Profiling our segments on gender, again we explore this by absolute percentage, and the “index” – which shows the relative skew as ratio to the average (which is a score of 100). From the below, we see the greatest gender skew for Aspirational Family Fun, they are much more likely to be male. Segments 2 and 3 show a slight skew towards females.

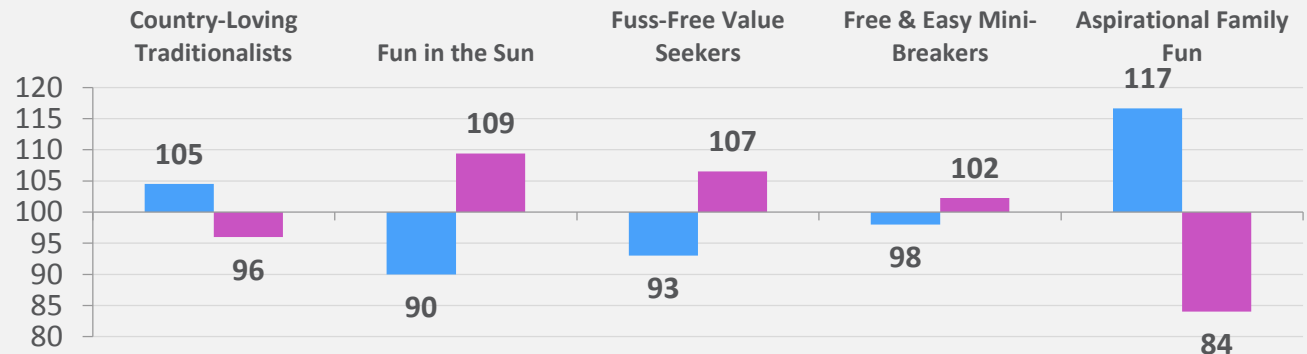
Percentage

■ Male
■ Female



Index

■ Male
■ Female

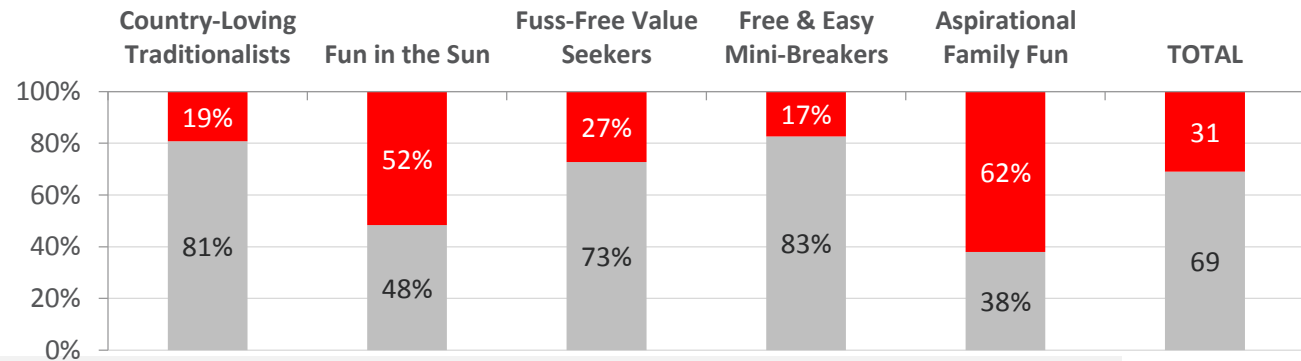


Profiling our segments: CHILDREN IN HOUSEHOLD

Profiling our segments on whether they have children or not, again we explore this by absolute percentage, and the “index” – which shows the relative skew as ratio to the average (which is a score of 100). Segments 2 and 5 are much more likely to have children.

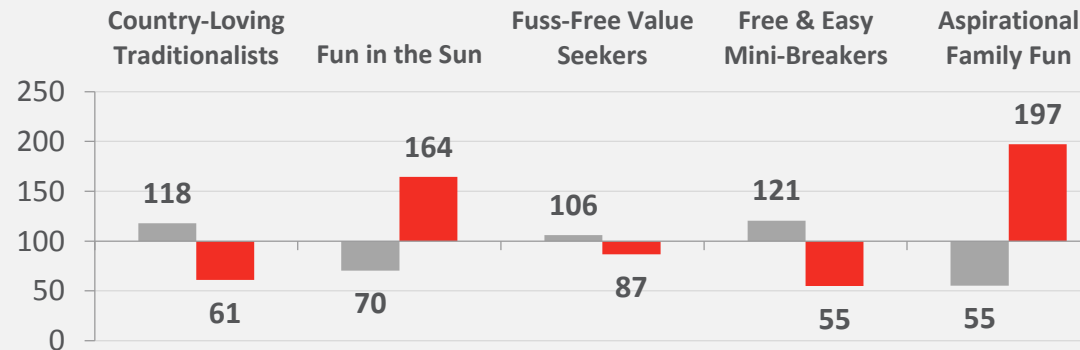
Percentage

- Have children
- Don't have children



Index

- Don't have children
- Have children



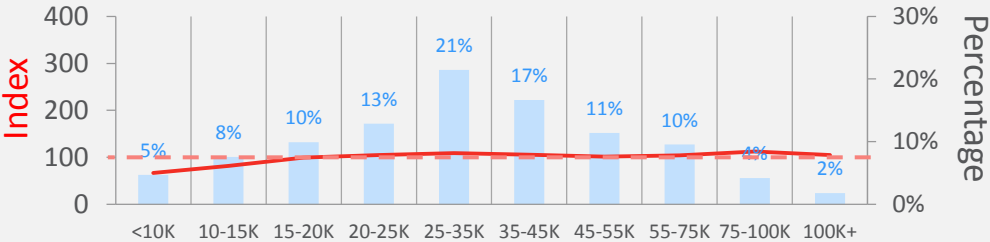
Profiling our segments: INCOME

Income distribution is a defining characteristic for two of the segments: Fuss-Free Value Seekers and Aspirational Family Fun. For the other segments, only minor deviations exist as shown below.

For Fuss-Free Value Seekers, their skew towards the lower incomes implies that these guys have means to holidays, and so it follows they would be taking short breaks closer to home. For Aspirational Family Fun, the implication of their skew towards higher incomes is that they are much more likely to have the means to take longer more expensive holidays abroad.



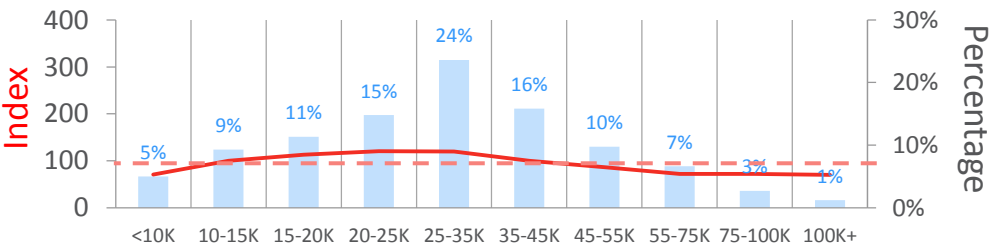
Country-Loving Traditionalists



No particular skew in income from the average.



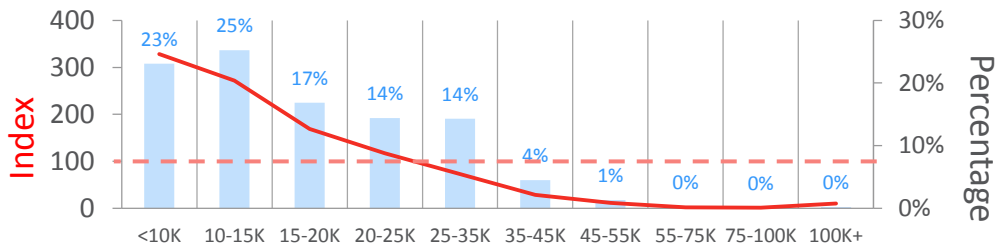
Fun in the Sun



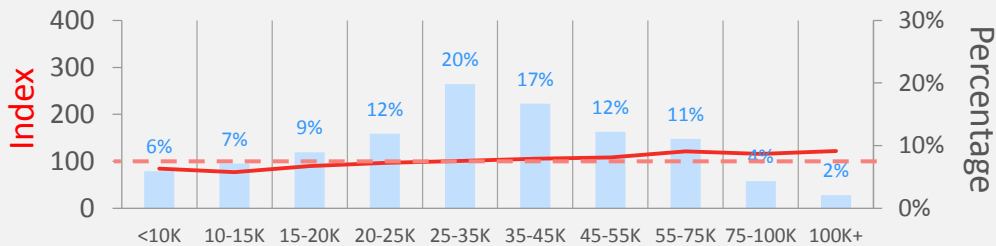
A minor skew towards the middle income brackets (and away from the high end)

Q68.
Base All respondents, except those with DK or refusal at income: Country-Loving Traditionalists n=6603, Fun in the Sun n=4530, Fuss-Free Value Seekers n=2418, Free & Easy Mini-Breakers n=5833, Aspirational Family Fun n=2820.

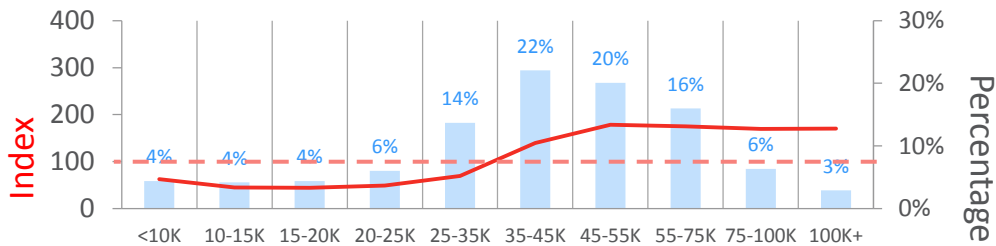
Profiling our segments: INCOME



A very, very clear skew towards the lower household income brackets, particularly in the under £15K bracket.



No particular skew in income from the average.



Clear income skew towards the higher income brackets – particularly in the over £45K bracket

Q68.
Base All respondents, except those with DK or refusal at income: Country-Loving Traditionalists n=6603, Fun in the Sun n=4530, Fuss-Free Value Seekers n=2418, Free & Easy Mini-Breakers n=5833, Aspirational Family Fun n=2820.

Profiling our segments: HOLIDAY BEHAVIOUR

Within our segments are distributions of the three different holiday types to England within the last 12 months (short, mid and longer holidays). For all, short breaks are the most common type. But the profiling reveals skews in the types of holidays they are more likely to take and how many. Aspirational Family Fun and Country-Loving Traditionalists take more holidays than the other segments, and are more likely to do so for longer.

Percentage taking holiday in England in L12M		Number of each holiday type to England <i>(share of holiday type in italics)</i>			
		Short breaks	Mid length holidays	Longer holidays	Total
Country-Loving Traditionalists	<div><div></div></div> 78%	1.4 <i>59%</i>	0.7 <i>29%</i>	0.3 <i>12%</i>	2.3 <i>100%</i>
Fun in the Sun	<div><div></div></div> 72%	1.1 <i>56%</i>	0.7 <i>33%</i>	0.2 <i>11%</i>	2.0 <i>100%</i>
Fuss-Free Value Seekers	<div><div></div></div> 76%	1.2 <i>52%</i>	0.7 <i>32%</i>	0.3 <i>15%</i>	2.2 <i>100%</i>
Free & Easy Mini-Breakers	<div><div></div></div> 70%	1.4 <i>66%</i>	0.5 <i>23%</i>	0.3 <i>12%</i>	2.1 <i>100%</i>
Aspirational Family Fun	<div><div></div></div> 71%	1.4 <i>53%</i>	0.8 <i>29%</i>	0.5 <i>18%</i>	2.7 <i>100%</i>

QA..
Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.

Profiling our segments: ACTIVITIES UNDERTAKEN ON THEIR LAST SHORT BREAK

In the below we see strong associations for several segments – for instance, Fun in the Sun is highly likely to engage in beach/seaside activities. Although small in absolute terms, Aspirational Family Fun is more likely than other groups to engage to sport events and guided tours.

	% participating in each activity						INDEX for each Segment				
	Country-Loving Traditionalists	Fun in the Sun	Fuss-Free Value Seekers	Free & Easy Mini-Breakers	Aspirational Family Fun	TOTAL	Country-Loving Traditionalists	Fun in the Sun	Fuss-Free Value Seekers	Free & Easy Mini-Breakers	Aspirational Family Fun
Went shopping	47%	59%	49%	57%	43%	52%	90	115	95	110	83
Explored a small town	57%	50%	34%	15%	29%	39%	144	128	85	39	74
Explored the countryside	65%	31%	23%	6%	28%	35%	188	90	67	18	81
Went to the beach / seaside	21%	83%	44%	9%	29%	34%	61	242	129	28	84
Explored a large town / city	27%	24%	24%	55%	37%	34%	79	69	71	161	108
Outdoor leisure pursuits (e.g. walking, cycling, golf, water sports)	38%	32%	19%	8%	27%	26%	145	124	74	33	104
Visited a castle, stately home or other historic site	38%	19%	15%	19%	26%	25%	150	75	61	74	101
Visited a museum or art gallery	22%	11%	12%	31%	24%	21%	106	54	57	144	113
Visited a garden	28%	14%	15%	9%	21%	18%	155	77	82	49	117
Attended an entertainment (e.g. cinema, concert, theatre, musical)	9%	15%	16%	29%	24%	18%	51	88	90	163	134
Went to a zoo, aquarium or sea life centre	7%	23%	14%	7%	20%	12%	54	181	111	59	162
Visited a theme park, pleasure beach or funfair	4%	25%	15%	6%	22%	12%	30	210	123	51	187
Went on a guided tour (e.g. bus tour or guided walking tour)	7%	3%	7%	9%	14%	8%	88	42	96	126	187
Watched a sporting event	3%	3%	6%	7%	12%	5%	60	56	105	125	233
Visited family/relatives/friends	2%	1%	3%	3%	1%	2%	93	42	150	149	64

The Greener the cell, the higher the score compared to the total.

Blue indicates higher index in the matrix, Red indicates lower index in the matrix

Blue text indicates higher average comparing column-wise
Red text indicates lower average, comparing column-wise

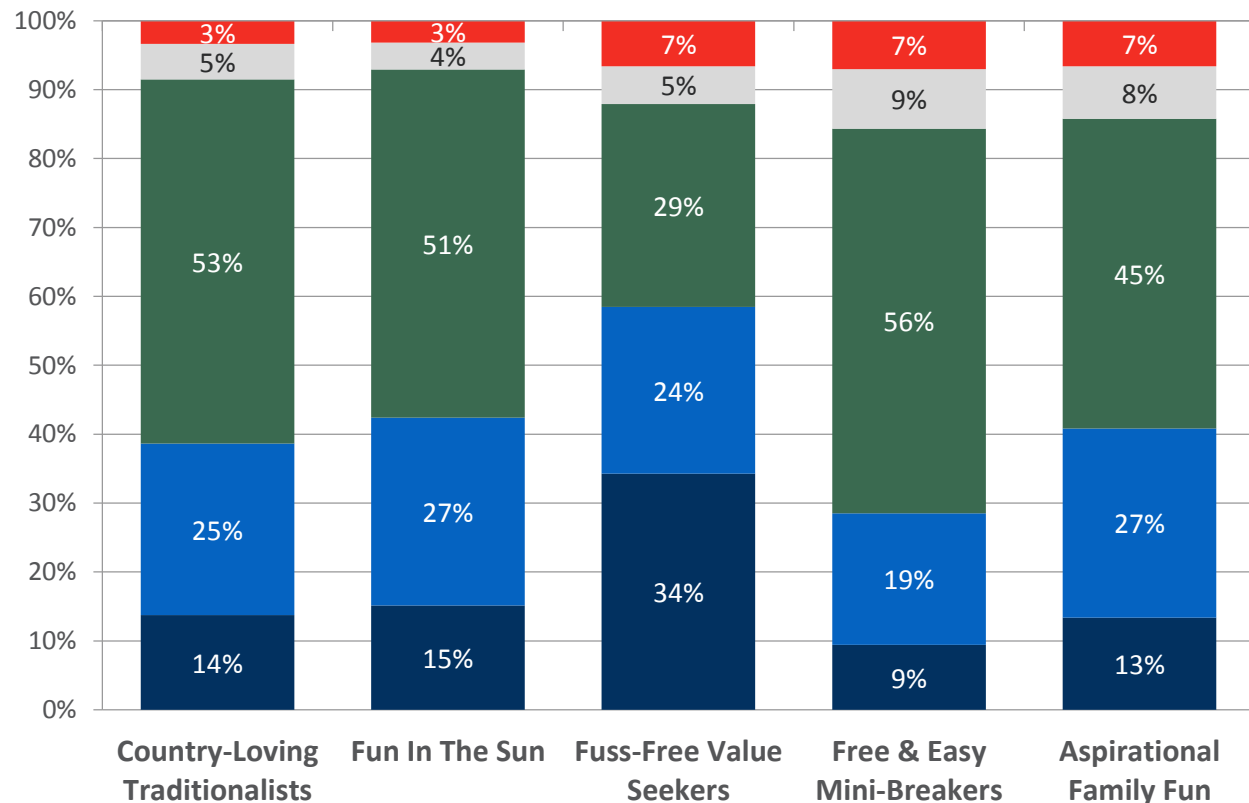
Q44.

Base All respondents – holiday in England, Country-Loving Traditionalists n=5512, Fun in the Sun n=3530, Fuss-Free Value Seekers n=1962, Free & Easy Mini-Breakers n=4323, Aspirational Family Fun n=1931

Profiling our segments: RELATIONSHIP TO ENGLAND

Again we profile by the absolute percentages and the index. Both of these measures show clearly that a strong relationship exists between Fuss-Free Value Seekers and England – for a large portion (34%) it is the only place they would consider, and they are at least twice as likely as other segments to do so (index: 225).

- I wouldn't normally consider it for a holiday or short break but I wouldn't totally reject it
- Not one of my usual holiday or short break destinations but I might consider it
- One of a number of destinations I am happy to visit for a holiday or short break
- My favourite destination for a holiday or short break but I will also consider others
- The only destination I would consider for a holiday or short break



Profiling our segments: ATTITUDES TOWARDS COUNTRIES AS SHORT BREAK DESTINATIONS

Segments 1 and 2 show a strong affinity towards England as a place for a short break or holiday, while Free & Easy Mini-Breakers and particularly Aspirational Family Fun show the greatest openness to international short holidays/breaks, whereas Fuss-Free Value Seekers is most closed to international short breaks/holidays, presumably via affordability.

MEAN SCORES: 0-10 scale – ratings of countries as short break destinations:

“10=perfect country in every way for a short break and 0 = terrible”

	Country-Loving Traditionalists	Fun in the Sun	Fuss-Free Value Seekers	Free & Easy Mini-Breakers	Aspirational Family Fun
England	8.5	8.5	8.3	8.1	8.0
Wales	7.5	7.4	6.8	7.0	7.2
Scotland	7.4	7.1	6.7	7.1	7.2
France	6.3	6.4	5.6	6.7	7.0
Spain	5.9	6.2	5.7	6.5	6.9
Ireland	6.6	6.7	6.1	6.8	7.1

Green indicates higher score in the matrix, Yellow is medium, and Red indicates lower score in the matrix

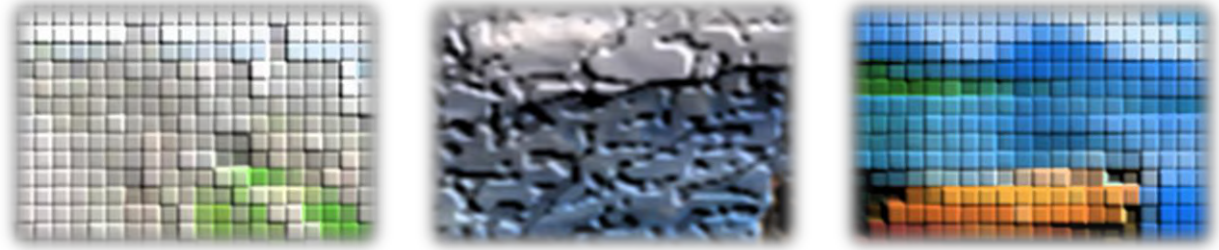
	Country-Loving Traditionalists	Fun in the Sun	Fuss-Free Value Seekers	Free & Easy Mini-Breakers	Aspirational Family Fun
England	103	102	100	97	96
Wales	104	102	94	97	99
Scotland	103	99	94	100	100
France	99	99	87	104	109
Spain	95	101	91	105	112
Ireland	99	100	92	102	106

Blue indicates higher index in the matrix, Red indicates lower index in the matrix

Blue text indicates higher average comparing column-wise
Red text indicates lower average, comparing column-wise

Q1b.

Base All respondents, Country-Loving Traditionalists n=7524, Fun in the Sun n=5087, Fuss-Free Value Seekers n=2884, Free & Easy Mini-Breakers n=6602, Aspirational Family Fun n=3076.



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#1 Country-loving traditionalists



Typically empty nesters with traditional values, country-loving traditionalists have a moderate household income, but fewer family members to cater for when on holiday. This means that their budget stretches further, and good quality, secure accommodation is a priority when booking a holiday. They are likely to have recently taken a countryside break and keep up to date with UK tourism through websites such as English Heritage and the National Trust.

INCOME

AVERAGE

No skews to average income – 51% in the £20K-£45K HH income bracket

LIFESTAGE



Married/living with partner (**73%**) with no children (**81%**). Nearly half are aged 55+

LIVE

More likely to live in East/Anglia and South East (29%, Index*: 108)

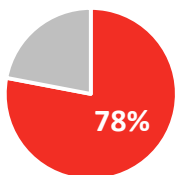


MEDIA



Higher than average consumption of broadsheets (**27%**) and UK tourism websites (**15%**)

ENGLAND TOURISM



Visited England in the last 12 months

2.7 holidays a year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...



Typically a countryside break (**64%**) for two (**58%**)



59% didn't stay in a hotel, being more likely than other segments to prefer the 'personal touch' of a b&b or rented accommodation

54%

Booked directly through the accommodation provider, not an intermediary



Spent time exploring the countryside (**65%**) and/or small towns (**57%**)

TOP PRIORITIES IN CHOOSING A HOLIDAY

IMPORTANCE	% T2B	Index*
Unspoilt countryside	79%	105
Clean and tidy environment	77%	104
Opportunities to eat/drink local food/produce	63%	104

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers a wealth of cultural experiences	110
Makes you feel connected to the country's history and heritage	109
Has beautiful countryside	109
Is an ideal place for people like me	109

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic

#2 Fun in the sun

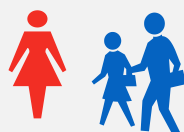


Typically families looking for sunshine or summer holidays where beaches play a starring role. The number of holiday-makers to be catered for on a moderate household income means that they are likely to take fewer breaks than other segments (2 per year) and seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.

INCOME AVERAGE

Although slight skew towards the middle bracket (55% in £20K-£45K)

LIFESTAGE



Skew female: 56%

Married/living with partner (75%); half with children. 47% are aged 35-55 years

LIVE

More likely to live in West and South West (24%, Index* 114)

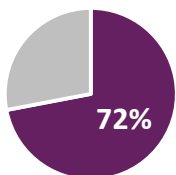


MEDIA



Lower than average consumption of broadsheets (15%) and strong users of social media (68%)

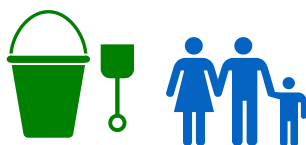
ENGLAND TOURISM



Visited England in the last 12 months

2.0 holidays per year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...



Typically a seaside break (86%) for at least 3 people (59%)



More likely than other segments to stay in a caravan (22%) or holiday camp (12%)



41% travelled in the summer; more 'seasonal holidaymakers' than other segments



Spent time at the beach (83%), shopping (59%) and/or exploring a small town (50%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Good range of outdoor activities	46%	128

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Is good for families with kids	114
Has good beaches	114
Makes me want to return again and again	110
Has a sense of excitement and adventure	110
Is fun	109
Is good for people younger than me	109
Makes me feel like I've had a proper holiday	108

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic

#3 Fuss-free value seekers



Typically empty nesters on a budget, they seek good value beach holidays with convenient transport links. Although they tend to book hotel accommodation, cheaper alternatives are also considered. Fuss-free value seekers are less digitally active than other segments, being less likely to engage in social media or book their holiday online. They are, however, avid consumers of the mainstream tabloid press.

INCOME LOWER

Skew towards much lower household incomes. 65% with HH income <£20K

LIFESTAGE



More likely than other segments to be single (36%); and not live with children (73%). Nearly half are aged 55+

LIVE

More likely to be in East Midlands (10% of total, Index*: 122)

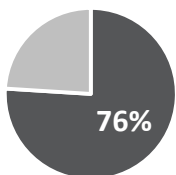


MEDIA



Most likely to read the tabloids (52%) and least likely to engage in social media (60%)

ENGLAND TOURISM



Visited England in the last 12 months

2.2 holidays per year

↑ 34%

Would **only** consider England for a holiday or short break

ON THEIR MOST RECENT TRIP...



Typically a seaside break (53%) for two (50%)



41% stayed in a hotel. More likely than other segments to choose a caravan (14%) or holiday camp (12%)

53%

Booked their holiday online, but they are the segment **least likely** to do so



Spent time shopping (49%), at the beach (44%), and/or exploring a small town (34%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Easy to get around by public transport	50%	121
A destination that is easy to get to by public transport	45%	120
A destination that doesn't take too long to get to	61%	117
Overall availability of deals and discounts for the destination	62%	113

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Is good value	113
Makes me feel like I've had a proper holiday	110
Has good beaches	110

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic

#4 Free and easy mini-breakers



Typically more likely than other segments to be young, free and single, free and easy mini-breakers have an average household income; however they are able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. This segment is demographically close to 'the average Joe' (with few skews), but it is in their holiday behaviour that they really stand out from other segments.

INCOME AVERAGE

43% in the £20K-£45K HH income bracket; some high earners (1 in 4 earning £45k+)

LIFESTAGE



Segment most likely to be single (38%), no kids (83%) and aged under 55 (70%)

LIVE

More likely to live in the North (East or West) – 21%, (Index* 113)

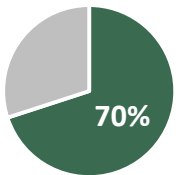


MEDIA



Higher than average consumption of broadsheets (24%) and strong users of social media (66%)

ENGLAND TOURISM



Visited England in L12M

2.1 holidays a year.

Skew towards taking a short break (↑ 66% share of holidays)

ON THEIR MOST RECENT TRIP...



Most likely to be a city break (73%) for two (59%) over 1-3 nights (87%)



71% stayed in a hotel, with B&Bs the only alternative considered (19%)

71%

Chose to book their accommodation online; along with segment #5, the segment **most likely** to do so



More likely than others to shop (57%), explore the city (55%), visit a museum or gallery (31%) and/or indulge in cultural entertainment (29%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
A destination that is easy to get to by public transport	46%	122
Easy to get around by public transport	50%	120
Availability of festivals, music, sporting and cultural events	39%	111

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Mean score**
Has beautiful countryside	1.39
Has interesting towns and cities	1.31
Is easy to get to	1.26

*Index is a measure of skew the % divided by the average, with 100 being the average.

**Mean score based on +2 strongly agree through -2 strongly disagree

↑ shows higher than average statistic

#5 Aspirational family fun



Typically London-based high earners with children at home, this segment regularly takes city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits. They are information hungry: avidly consuming mainstream media (especially newspapers), active on social media, and actively browsing holiday booking websites to evaluate and book their holiday accommodation.

INCOME HIGHER

Skew much higher incomes.
- 67% with HH income
£35K+ (45% over £45K)

LIFESTAGE



Tend to be male (57%)
and aged under 50 (92%).
Segment most likely to
have children (62%)

LIVE

Much more
likely to live in
LONDON (26%,
index*: 174)

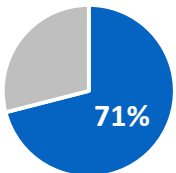


MEDIA



Highest consumption of
broadsheets (31%) and
free newspapers (18%).
Visit UK tourism
websites (15%)

ENGLAND TOURISM



Visited England in L12M

↑ 2.7 holidays a year

More likely to take a
longer holiday than
other segments (↑ 18%
share of holiday type)

ON THEIR MOST RECENT TRIP...



Typically a city break
(45%) for at least 3
people (55%)



54% stayed in a hotel, with 1
in 5 opting for a b&b instead

34%

Chose the convenience of
booking through an
aggregator website, the
segment **most likely** to do so



More likely than others to
spend time at a theme park
(22%), zoo/aquarium (20%)
and/or sporting event (12%)

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Good nightlife	49%	148↑
Availability of festivals, music, sporting and cultural events	51%	144↑
Good range of water-based/beach activities	50%	131↑

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers great entertainment / nightlife	116↑
Makes me feel like I'm doing less harm to the environment	121↑

*Index is a measure of skew the % divided by the average, with 100 being the average.

↑ shows higher than average statistic