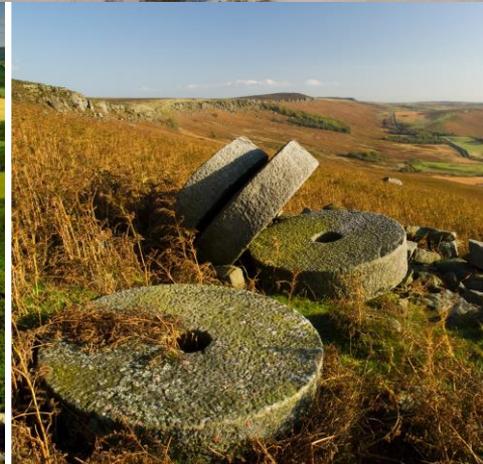
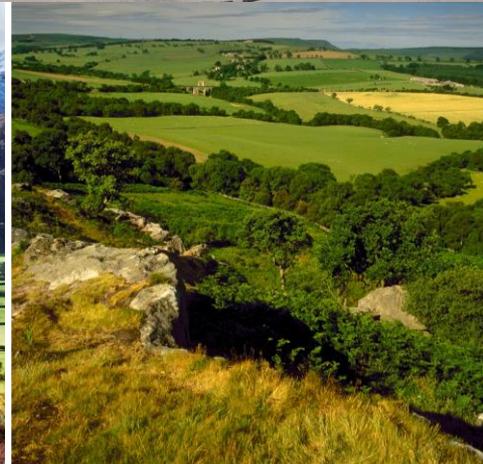




VisitEngland™

Discover England Fund Research Summary Report

Making Great memories in England's National Parks and countryside
November 2017



XV Insight

Contents

- This report brings together the key findings and insights relevant to this project from across the VisitEngland research programme.
- It is designed to provide the Discover England Fund Large Project teams with a summary of the key themes and relevant market profiles. It can be used to guide project development activity and inform stakeholders and partner organisations.



	1. Introduction
2. Current Trends and Challenges	
	3. Promoting Regional England
4. Differentiating / optimizing the opportunity	
	4a. Themes & Activities
4b. Multi-Park Experiences	
	4c. Gateways & Connectivity
4d. Travel Trade partnerships	
	4e. Planning & Booking
5. Summary – key take outs	
	6. Appendix

Note 1: Sources are short-referenced on each page. Full details of data sources including links where appropriate are included in the appendix.

Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.



Introduction



Project overview



Key Messages and areas of focus

Elevator Pitch

England's National Parks Experience Collection gives travellers the opportunity to experience first-hand these living landscapes, where residents and communities work the land, shape the landscape and make their living. These new and immersive experiences enable visitors to enjoy the real English countryside - the quirkiness, the extraordinary and the exceptional.

Our National Park communities are part of English culture, passing down unique traditions from generation to generation. They offer a range of memorable, once-in-a-lifetime experiences in landscapes that are magical, breath-taking and unique and that can only be appreciated from within our National Parks. We will take you behind the scenes of rural English life to connect you with local people, with centuries of history, culture and cuisine where the past meets with new outdoor adventures in our finest landscapes; some personally delivered by our National Park Rangers. These easily accessible and bookable experiences, joined up with quality accommodation and transport, will create lifetime memories within our iconic English landscapes.

Six potential themes for experiences within the National Parks Experience Collection

1. **Natural Landscapes:** Gentle experiences that will connect visitors to the unique beauty of our National Parks, creating lasting memories.
2. **Cultural and Community Engagement:** Immersive experiences that connect the visitor with culture and to local communities where they can experience rural life at first-hand in a once-in-a-lifetime opportunity.
3. **Living History:** Hands on experiences where visitors can interact with history, engage with traditions and learn new skills.
4. **Active Activities:** Moderate to adrenaline filled active experiences for the slightly daring outdoor enthusiasts.
5. **Food Experiences:** Contemporary farm to fork culinary experiences.
6. **Ranger Experiences** For individuals and groups who want a range of guided in-depth experiences with trusted local experts.



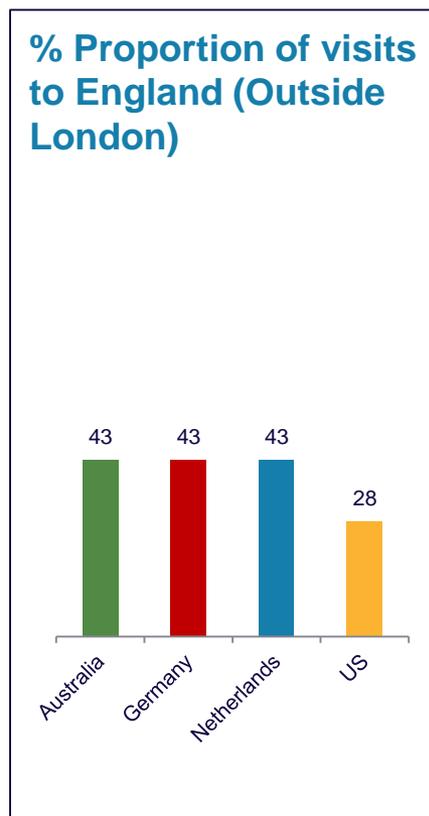
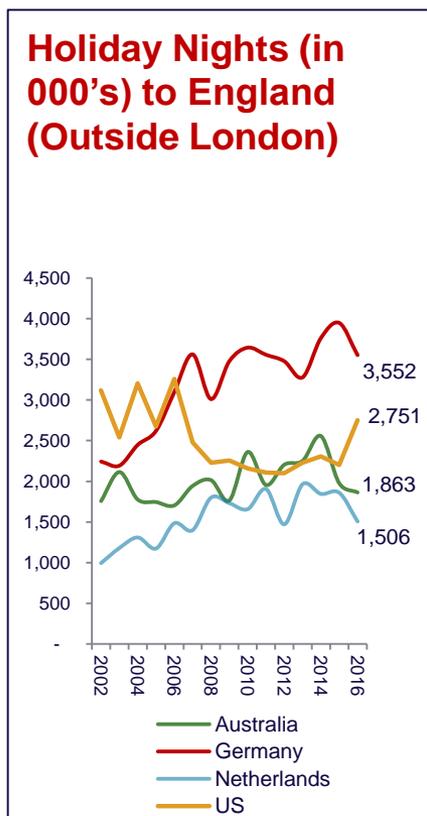
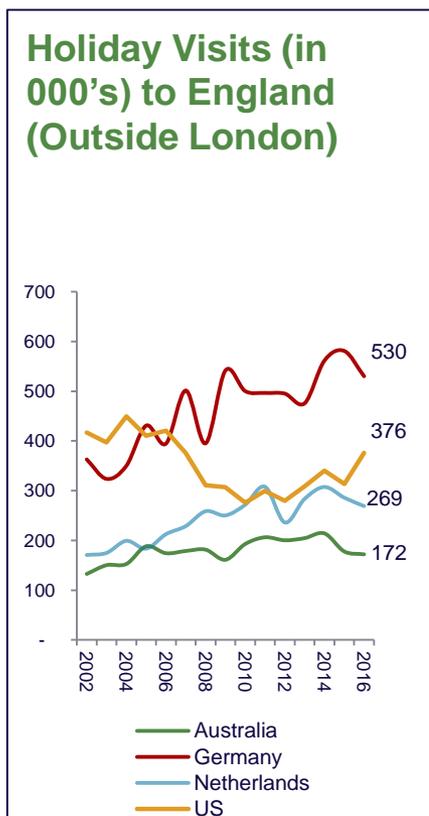


Current Trends & Challenges



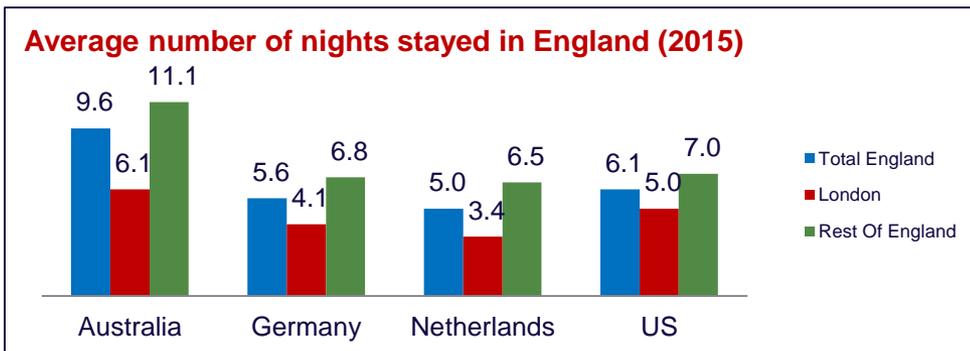
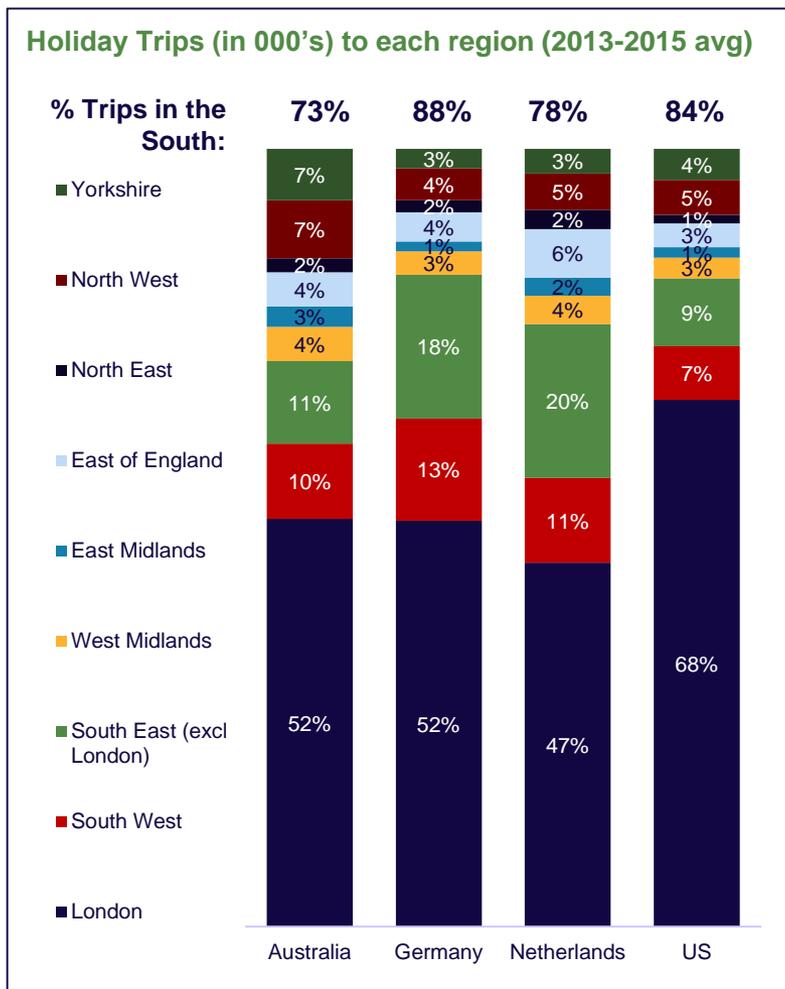
Current Inbound Travel Trends to England (outside of London)

- Only 31% of all trips to England made by overseas visitors currently involve a stay outside of London – the biggest challenge is to persuade visitors to venture beyond London



- **Australia:** Holiday visits from Australia to regional England continue to decline. However, still a large proportion of visitors travel beyond London.
- **Germany:** Visits and duration inbound from Germany have dropped in 2016.
- **Netherlands:** Visits and duration have both declined and visits to the rest of England have also dropped.
- **US:** Visits and duration of stay to the rest of England have increased. But London still dominates, with only 29% visiting regional England.

Current Inbound Regional Trends – there continues to be a clear North / South divide in terms of holiday trips taken



Considerations:

- Less than 27% in each target market venture further than the South regions. The challenge is to encourage travel beyond the South of England.
- The Australian visitor stays considerably longer in England. 41% stay for over two weeks. The additional time spent in England is predominantly outside of London.

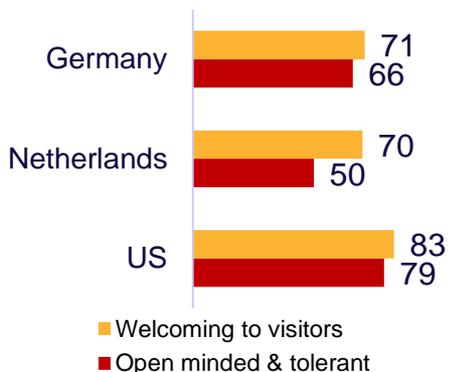
Key challenges – Political, Economic and Social environment; Threat or Opportunity for England’s travel market?

Perceptions of Britain - Brexit

Potential impact both negative and positive:

- Some sense of **‘they don’t want us’** from other European countries.
- May increase **competitiveness of Ireland** (& Scotland).
- But also, reinforces the nationalist, **island mentality which can translate to quirky, real England.**
- People say they are **more likely post-referendum to visit Britain** (esp. US).

Perceptions of Britain (%)

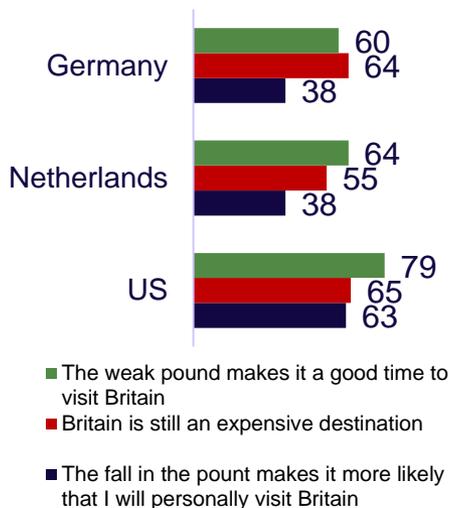


No data on Australia available

Brexit – Exchange Rate

Initial movement post-Brexit vote appears to have ‘reset’ the value of pound - there is high agreement that the weak pound makes it a good time to visit Britain. However, Britain is still seen as an expensive destination.

Exchange Rate Impact (%)



No data on Australia available

Perceptions of Britain – Safe & Secure destination

The threat and reality of terror is impacting traveller attitude & behaviour – most markets saw a notable decline in agreement with *‘Britain is a safe and secure destination’* following a number of terrorist attacks during 2017.

Britain: Safe & Secure destination (%)



No data on Australia available

Key challenges – Competitive environment - How do we increase consideration of England’s regions outside London?

Competitive Environment

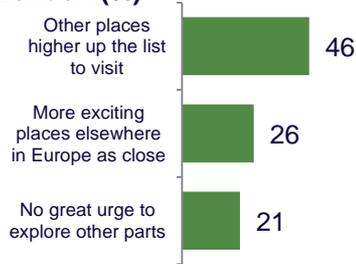
- As well as competing with other overseas destinations, the dominance and perceptions of London have a wider impact on other destinations in England.

1. Competitor Destinations

Main competitor destination by country when considering a visit to England:

- Australia** : France, Germany and Italy
- Germany**: Ireland, France
- Netherlands**: France, Spain
- US**: France, Germany and Italy

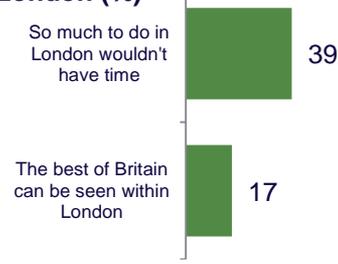
Reasons for not going beyond London (%)*



2. Dominance of London

- The draw of London itself can deter visitors from going elsewhere in England.
- London is a major gateway, particularly for direct long-haul travelers (from the US).

Reasons for not going beyond London (%)*



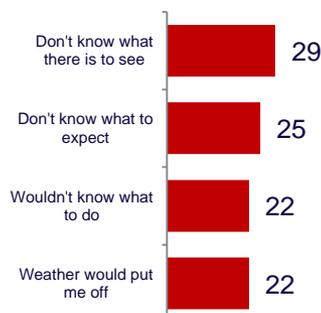
Growing inbound travel to England’s regions

- Growing awareness of England outside London and alleviating transport concerns are key challenges.

1. Promoting regional England

- Awareness of destinations and activities / products across our regions is low – making it difficult to imagine what their holiday would be like.

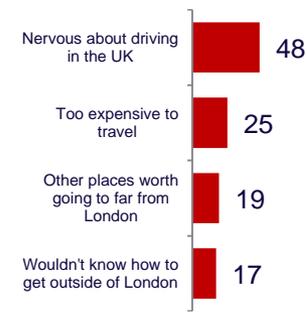
Reasons for not going beyond London (%)*



2. Address Transport concerns

- Promoting transport network outside of London and safe road record is key.
- Providing clarity around journey planning, particularly the last mile.

Reasons for not going beyond London (%)*



* Data is all visitors to England who only visited London



Promoting Regional England



Awareness of regional England is the biggest challenge to overcome – inbound visitors cannot imagine the experience they will have outside London because of lack of knowledge of what is on offer

Main Barriers of travelling beyond London

1) Low top of mind awareness of regional England

Do not underestimate the lack of knowledge of places to visit outside London.

Among visitors planning a trip to England, London is the most mentioned place.

2) Lack of understanding of what to do / expect from a holiday in regional England

Inbound visitors find it hard to imagine the type of holiday they would have – knowledge of culture and attractions outside of London is low.

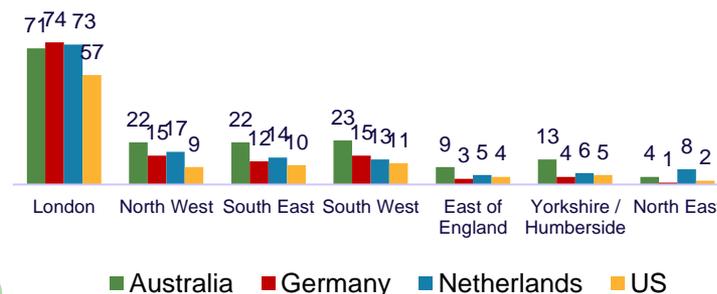
3) And lastly, lack of available time for short stay visitors if starting in London

Visitors often think there is too much to do in London which can discourage them from looking at other options.

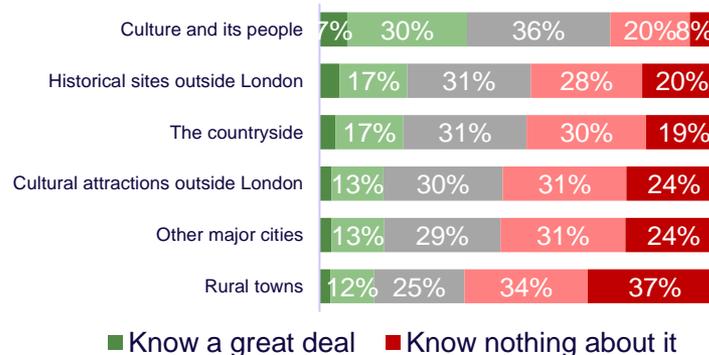
Considerations: Helping customers imagine regional England

Compare England offer favourably with similar, well-known 'regional' offers in other countries and National Park experiences.

Where in England would you like to visit? (% top of mind mentions)

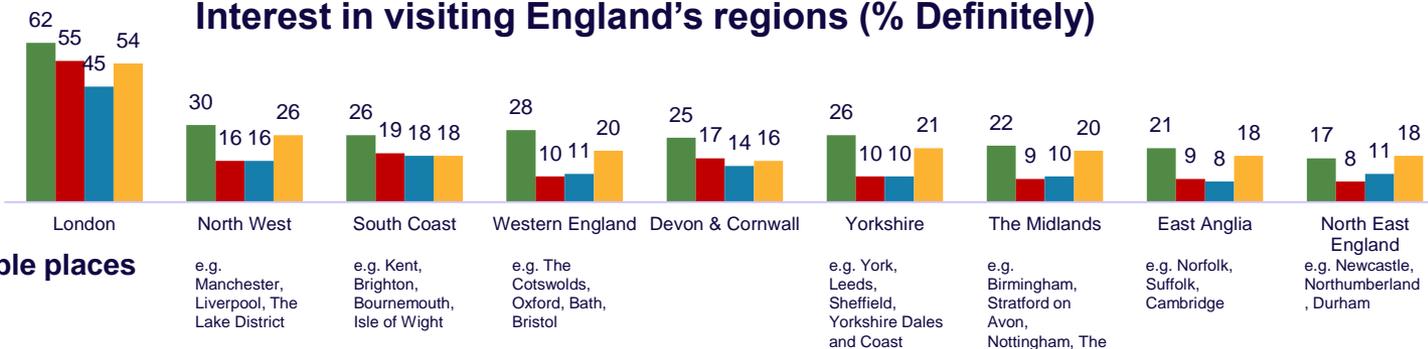


What do you know about Britain outside of London?



The low interest outside the south of England, particularly among the Germans and the Dutch is in part due to the perceived ease of getting to these locations, as well as lack of knowledge about what there is to see and do

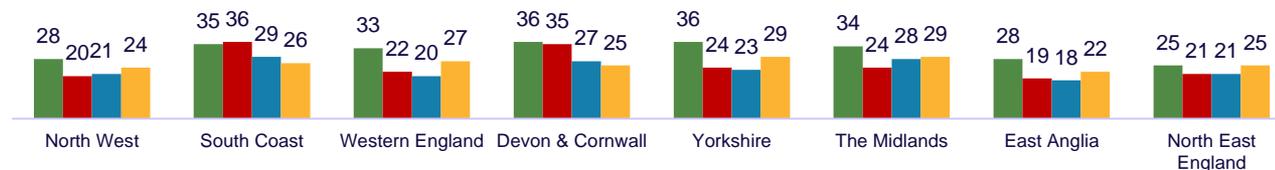
Interest in visiting England's regions (% Definitely)



Agreement: Has lots to see and do (%)



Agreement: Has beautiful countryside (%)



Agreement: Is easy to get to (%)



There are some key themes to focus your communication on to grow awareness and appeal beyond London

Heritage	Countryside	Uniqueness and variety	British people and way of life	Trains, tours, and packages
<ul style="list-style-type: none"> • History and heritage are strongly associated with Britain's holiday offer. 81% visited outside of London because of the history spread across the country. • 'Awe' and 'amazement' (especially from the US) are common themes but it is important to get across the 'experience' and the story behind a place. 	<ul style="list-style-type: none"> • 78% of those going beyond London did so because of Britain's unique and beautiful countryside. • Countryside was a major lever to convey 'unique, different, beautiful and relaxing' experiences. 	<ul style="list-style-type: none"> • Britain's unique and varied nature is also appealing; 80% of those who went beyond London did so because Britain's diverse regions make for an interesting holiday. • Having unique places to stay was also a draw, a reason for 75% of those who had been outside London. 	<ul style="list-style-type: none"> • Over two-thirds of those who went beyond London mentioned the British people as a reason for travelling outside London. • 70% wanted to meet the British people and see the British way of life and 67% because they were friendly and welcoming. 	<ul style="list-style-type: none"> • Most are willing to travel 2-3 hours from their initial base (typically London) to stay in another destination. Their preference is for train travel due to concerns about driving. • Packaged tours and itineraries were also mentioned to enable them to get the most from the trip.



Simple and clear communication which provides a complete understanding of your offering and how to get there is key. A tiered approach is recommended focusing on the primary drivers for visiting England i.e. heritage

- Qualitative work was undertaken among Americans and Germans who had never visited the North of England but may have visited other parts of the UK. The aim was to test a proposed marketing campaign to promote the North of England.
- The ad tested below had areas for optimisation for a number of reasons:
 - Too much was assumed about what the viewers knew about the area
 - The landscape was diluted by the boots in foreground, and were off putting (particularly for the German market)
 - Simpler clean images of the scenery were preferred



Key Learnings from Northern Futures Research

- 1) Any marketing communication, regardless of channel, needs to drive a **complete understanding of what the National Parks products offer**
- 2) A tiered or phased approach to communication is recommended
 - Start with the primary reasons for visiting England - **most iconic sights should be given most exposure**, i.e. heritage, *named* landscapes.
 - Food would follow secondary, as many are not convinced of England's food credentials
- 3) Keep communication simple
 - Visuals of the area's attractions go a long way to speaking for themselves
 - Avoid colloquialisms which may confuse overseas audiences



How to differentiate and optimise the National Parks Opportunity

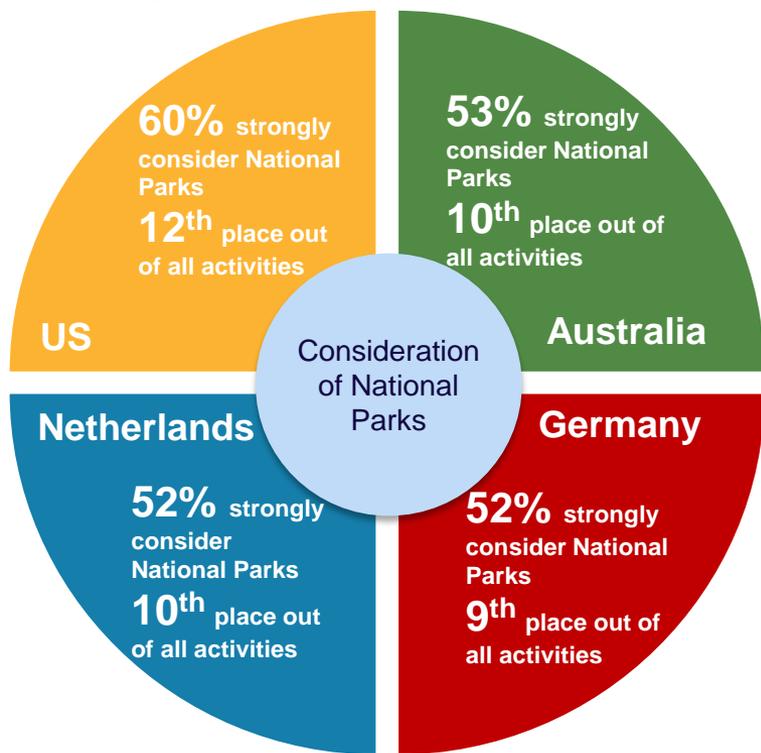
- Themes & Activities
- Multi-Park Experience
- Gateways & Connectivity
- Travel Trade partnerships
- Planning & Booking



How to differentiate and
optimise the National Park
Experience
- Themes & Activities

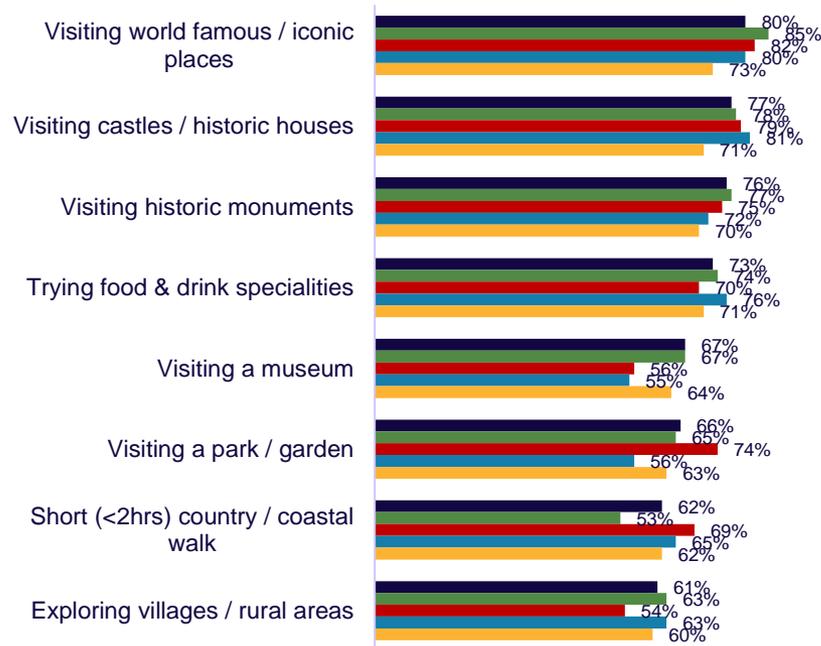
While National Parks are within the top 10 of activities visitors to England would consider, other activities have a greater pull

Consideration of National Parks and relative ranking against 40 other activities



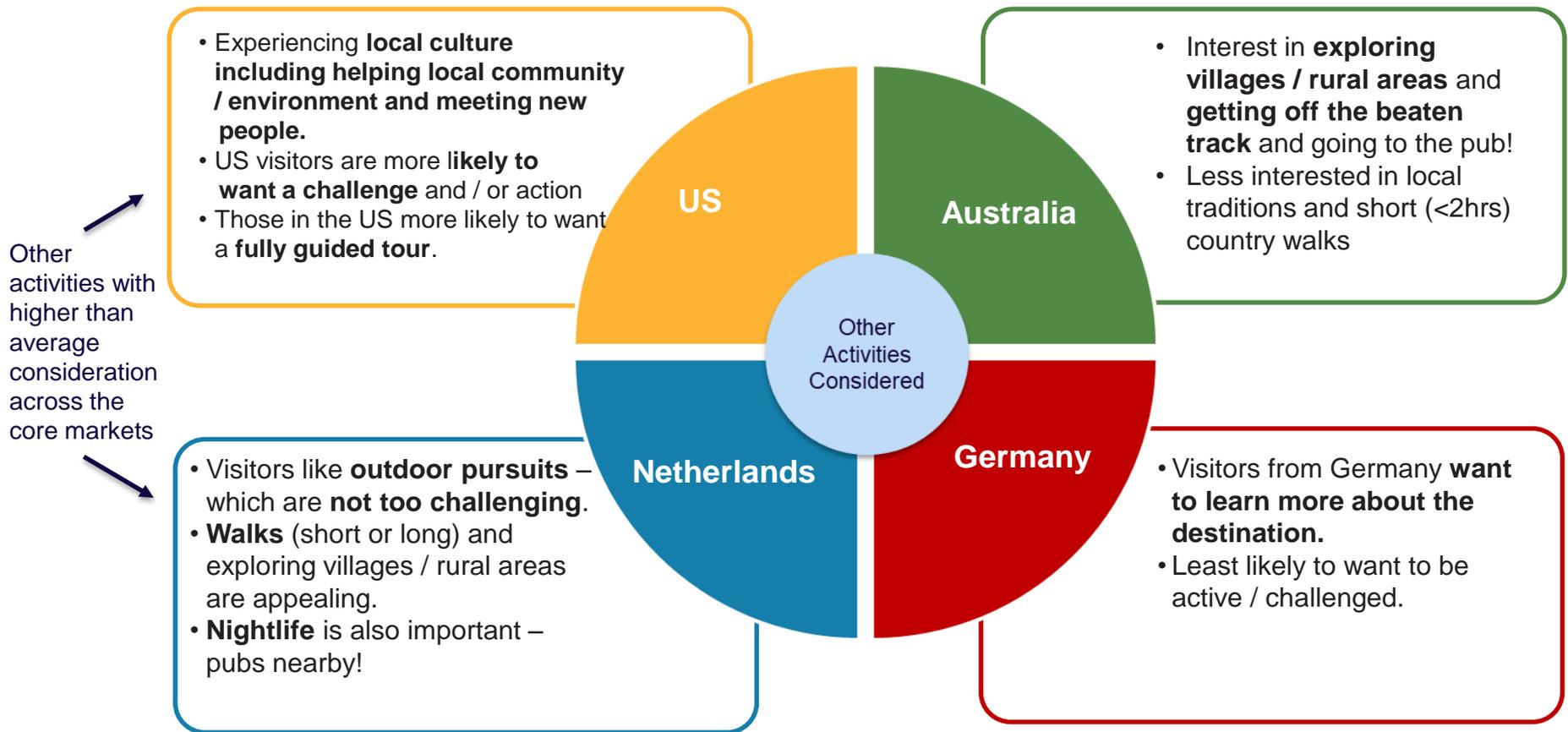
- The **top 3 to 4 activities inbound visitors strongly consider tend to centre on history**; visiting world famous or iconic places, visiting castles or historic houses or monuments.
- Trying local **food & drink specialities** is also a pull across the core markets.

Top 8 activities considered



■ Total ■ Australia ■ Germany ■ Netherlands ■ US

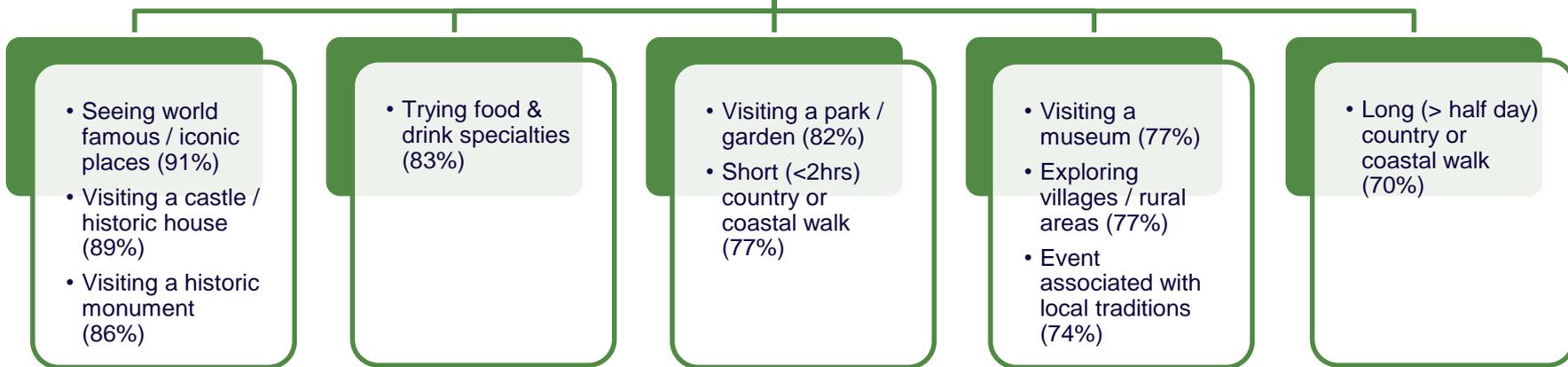
Beyond history and food & drink experiences, there are other activities that have higher than average consideration across the core markets



The crossover with other activities in consideration among those who would visit a National Park when on holiday in England highlights which of the 6 themes might be most successful

Among those who would visit a National Park what other activities would they consider

Please note, there were no direct activities that related to Ranger experiences



Potentially Most Successful Themes

Potentially Least Successful

Experience Themes

1. Living History

“Hands on experiences where visitors can interact with history, engage with traditions and learn new skills”

2. Food Experiences

“Contemporary farm to fork culinary experiences”

3. Natural Landscapes

“Gentle experiences that will connect visitors to the unique beauty of our National Parks, creating lasting memories”

4. Cultural & Community Engagement

“Immersive experiences that connect the visitor with culture and to local communities where they can experience rural life at first-hand in a once-in-a-lifetime opportunity”

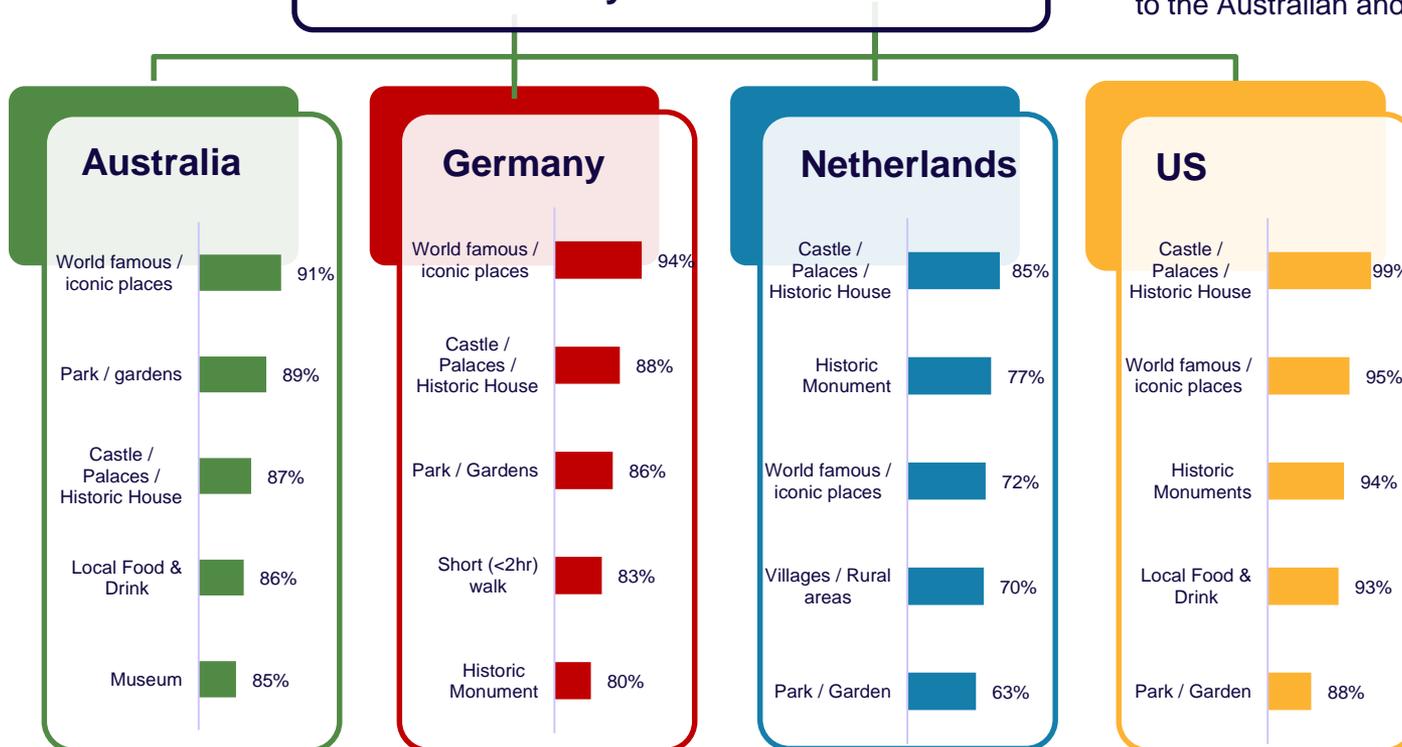
5. Active Activities

“Moderate to adrenaline filled active experiences for the slightly daring outdoor enthusiasts”

The crossover of activities across the target markets is fairly similar – but there is evidence to suggest that those in the Netherlands may not understand the term National Parks and / or fully understand the National Parks offer

Among those who would visit a National Park when on holiday in England, what other activities would they consider

- Living History is certainly a theme which would be of interest across all markets.
- Food & drink experiences are more appealing to the Australian and US markets.



Experience Themes – 1) Living History

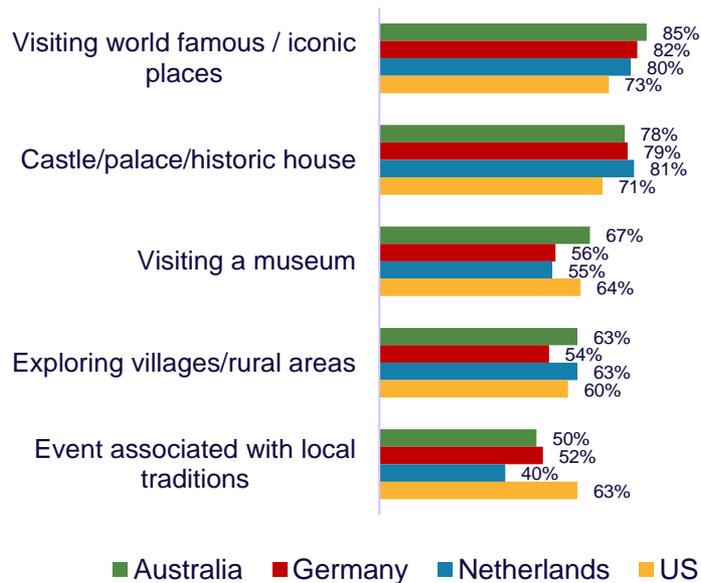
Living History:

“Hands on experiences where visitors can interact with history, engage with traditions and learn new skills”.

Considerations:

- There is cross-market appeal for Living History and as a concept it fits well with future traveller trends ‘*The Pursuit of Real*’.
- But there needs to be a difference in product positioning across the target market: Australians want to get of the *beaten track*; those in Netherlands want a more spontaneous experience compared to those in Germany (*seeing booking behaviours*).

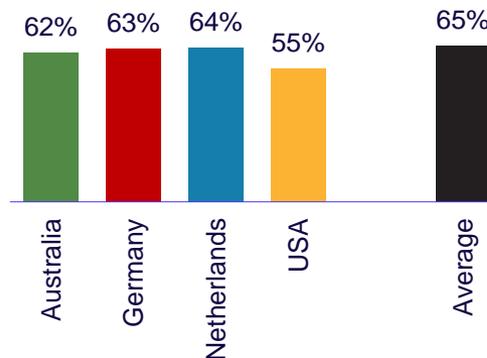
Consideration of Living History connected activities in England:



Future Traveler Trend – The Pursuit of Real

Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

“When I go on holiday, the most important thing for me is to experience the authentic culture of a place”
 % who agree strongly or agree

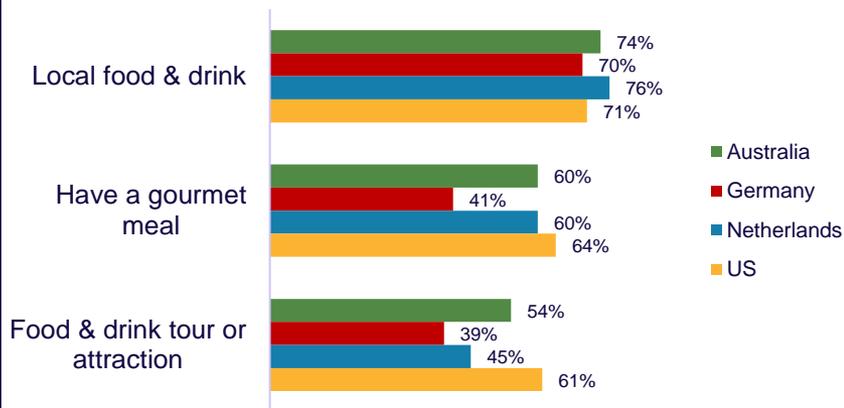


Experience Themes – 2) Food Experiences

Food Experiences:

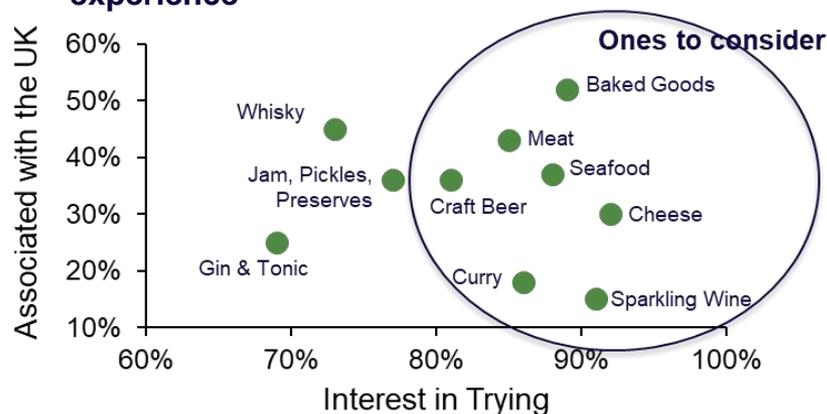
“Contemporary farm to fork culinary experiences”

Consideration of Food experiences:



- **Trying British dishes** is of interest, particularly full English breakfasts (49% extremely/very interested), roast dinners (46%), fish & chips (45%) and afternoon teas (45%). Typically, higher interest comes from the US.

- Food & drink is rarely a main reason to visit Britain (5% of 2015 visitors) but can **play a significant supporting role – ‘authentic exploration of the region’**, as there is an appetite to try food & drink related activities among those considering visiting Britain.
- There is most interest across all target markets in trying local food & drink specialities compared to other food experiences – and the **low association of some of these could be expressed as a unique experience**



Visit Britain have a site dedicated to promoting Food Hubs and Itineraries for the trade industry - <https://trade.visitbritain.com/destination-uk/food-and-drink/>

Experience Themes – 2) Food Experiences (cont.)

Considerations:

- Given the overlap in interest there is a clear opportunity for a Food Experience theme.
- Many of the National Park websites already showcase food and drink offerings that are available in the area - making it easy to book as part of the overall experience will be key.
- However, there might be some convincing to do around the quality of local produce (see chart to right). Conducting due diligence with local partners who you would onboard as part of the experience is paramount to ensure quality does not negatively impact the overall experience.

- Whilst satisfaction levels among visitors are quite high, there is potential to improve perceptions of Britain as a leading destination for local and good quality food.

	Trying local food & drink specialities	Going to a food & drink attraction	Having a gourmet meal
Interest in exploring villages and rural areas	73%	78%	70%
Interest in short walks (<2hrs)	71%	76%	
Interest in visiting National Park	67%		

Source: Optimising the Discover England Fund Application through Insight. Cross analysis of raw data.

Satisfaction with Food & drink among visitors to Britain (%)

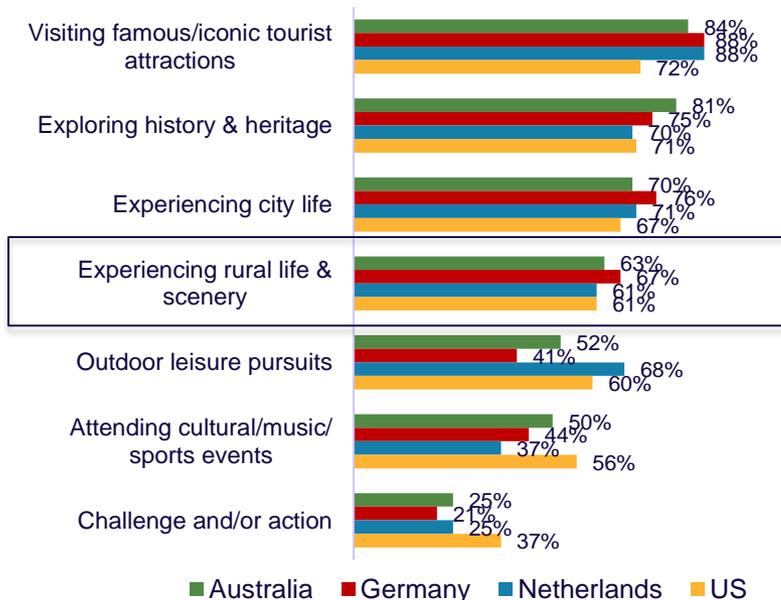


Experience Themes – 3) Natural Landscapes

Natural Landscapes

“Gentle experiences that will connect visitors to the unique beauty of our National Parks, creating lasting memories”.

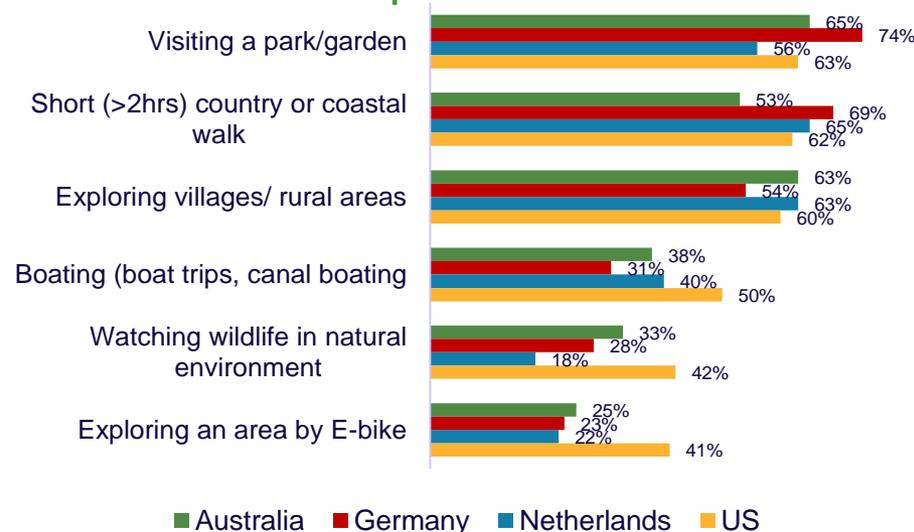
Experiencing rural life & scenery ranks 4th most considered activity in every market aside from Netherlands



Considerations:

- Beyond history, experiencing natural landscapes is a key driver of visits to England, one that will appeal to both Adventurers and Explorers.
- Positioning by market is key:
 - Australians want to get off the beaten track and explore villages / rural areas themselves.
 - Whilst in Germany, visiting parks / gardens and short country / coastal walks are key.
 - In the US, experiences might be more active in nature.

Consideration of types of activities to view the Natural Landscape



Experience Themes – 4) Cultural & Community Engagement

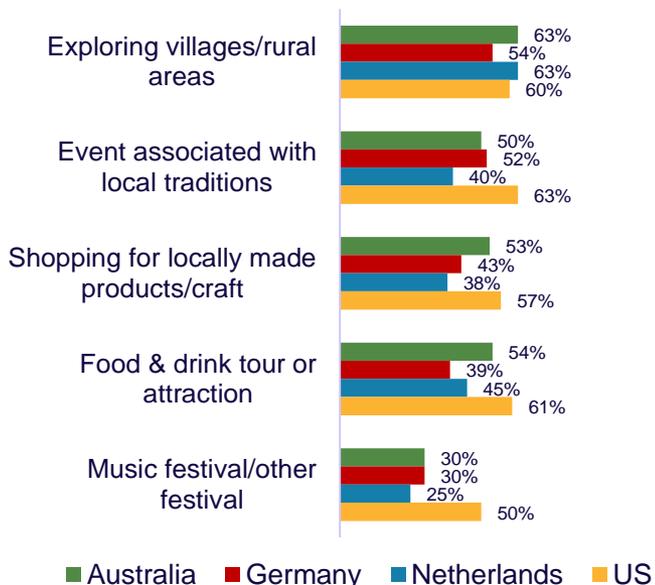
Cultural & Community Engagement

“Immersive experiences that connect the visitor with culture and to local communities where they can experience rural life at first-hand in a once-in-a-lifetime opportunity”.

Considerations:

- US visitors are more likely to be engaged with this theme – wanting to *help the local community / environment*.
- It would also have high appeal among Germans who have a stronger desire to learn new things as they travel.

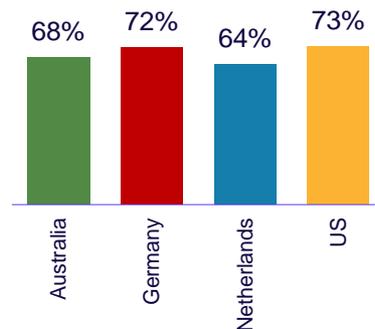
Consideration of local / cultural activities:



Future Traveler Trend – The Leisure Upgrade

- *Skill seeking future travellers will prefer tourism products that combine fun and an opportunity to learn*

“Entertainment should be about learning new things as much as simply having fun” | % who agree strongly or agree



“Don’t put everything into a glass box and expect people to come, because they will just be bored. If you look at the average consumer today, they are more demanding, more sophisticated, more culturally aware, have travelled further. There is built heritage, natural heritage and cultural heritage. **Cultural heritage is all about people and food and wine and that one has become more important than the others. Culture is no longer dead, the cultural is alive and that experience economy is driving everything”.**

IAN YEOMAN, TOURISM FUTURIST

Experience Themes – 5) Active Activities

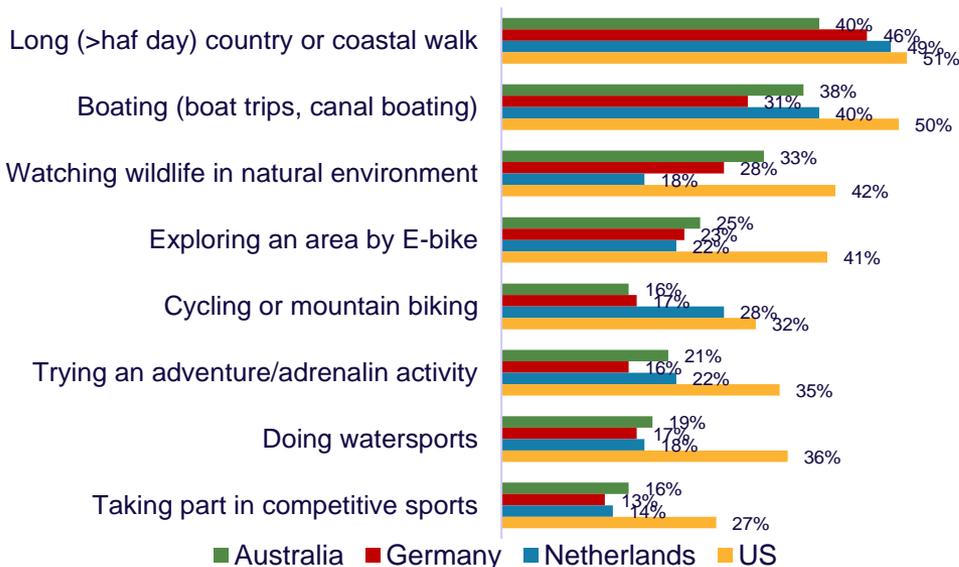
Active Activities

“Moderate to adrenaline filled active experiences for the slightly daring outdoor enthusiasts”

Only 31% say Challenge and / or action activities are considered

Consideration index (markets)
Rank of activity cluster in market

USA	120	7
AUS	83	7
NL	80	7
DE	67	7



Profile of those considering challenge and / or action based activities



Strong skew to young / middle aged family



Slight AB & C2DE skew



Male skew



Younger

Considerations:

- Active activities is a niche area and is popular with men and with the younger segments.
- This may be slightly at odds with the older targeted segments, but could add an additional layer of interest to the National Parks offer.
- Many of the activities tested so far (left) could be dialled up or down in terms of level of activity/adrenalin to suit the particular audience.
- The US market appears to be the most receptive to Active Activities.

Experience Themes – 6) Ranger Experiences

Ranger Experiences

“For individuals and groups who want a range of guided in-depth experiences with trusted local experts”.

Imagine that you are going to be spending a week on holiday/vacation exploring different places in Britain. To what extent would you be interested in doing each of the following things?

Percentage of respondents who selected 'Completely interested' (2014)

Note: no data available for Netherlands

	Australia	Germany	US
Off beaten track	71%	64%	66%
Train to travel from place to place	65%	44%	66%
Day trips	57%	65%	63%
Full guided tour	45%	39%	52%
Planned itinerary	57%	40%	53%

Future Traveler Trend – *Maximizing Behaviour*

- Value, for future travellers, will be about more than price. They will opt for trips that allow them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about.

Case Study

- The Stockholm Outback tour is aimed at travellers who are visiting Stockholm but also want to experience Sweden’s famous nature without having to travel too far. Its destination is a nature reservation located only 30 minutes out of the capital’s centre. The 3 hour tour is in first instance focused on spotting wild animals such as moose, wild boars and deer, but also takes participants on a long walk through the woods and includes a short coffee break by a beautiful lake.

Considerations:

- Ranger experiences offer the ability to have truly unique experiences.
- Those in Australia and the US are probably most open to this experience.

Concept test conducted in Germany suggests some challenges for the Natural Landscapes theme but also opportunities

Wording tested during the concept testing in Germany:

Wherever I travel in the world, I always look for places where I can experience more than just the usual tourist traps – I love experiencing the landscapes and cultures of the land I am travelling through.

England's National Park Experience Collection gives travellers the opportunity to experience first-hand these living landscapes, where residents and communities work the land, shape the landscape and make their living. These new and immersive experiences enable visitors to enjoy the real England - the quirkiness, the extraordinary and the exceptional.

Our National Park communities are part of English culture, passing down unique traditions from generation to generation. They offer a range of memorable, once-in-a-lifetime experiences that can only be appreciated from within our National Park landscapes. We will take you behind the scenes of rural English life to connect you with local people, history, culture and cuisine, many personally delivered by our National Park Rangers. These easily accessible and bookable experiences, joined up with quality accommodation and transport, will create lifetime memories within our iconic landscapes.

National Parks Experience: Engage with living culture

Germany

Strengths*	Challenges*
Nature	Uniqueness
Culture	Clarity
History	Concept dislikes
Authenticity	Little variety
Relaxation	Expensive
Allows me to visit places that I couldn't previously	Weather
Allows me to see the real country	
Concept likes	
Off the beaten track "secret corners"	
Different	
Immersion – first hand experience	

Implications

- Authenticity appears key across the experiences landscape, culture, food etc.
- The challenge is around uniqueness and clarity of the offer.

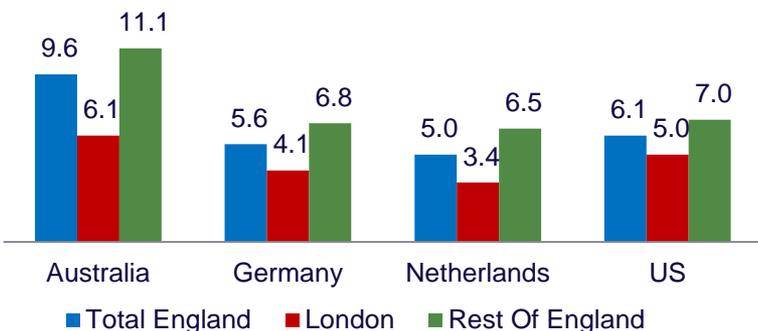


How to differentiate &
optimise the National Park
Opportunity

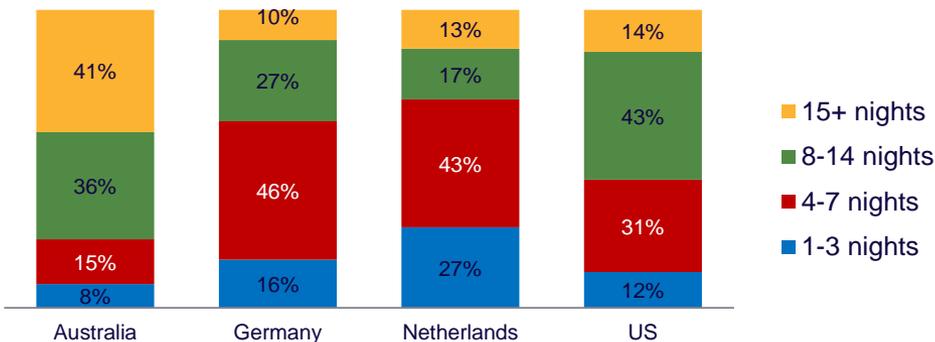
Multi-Park Experiences

While we do not fully understand the appetite for multi-park experiences per se, long haul visitors are more likely to have extra time in their itinerary and be more attuned to multi-location breaks

Average number of nights stayed in England (2015)



Duration of stay in England (2015)



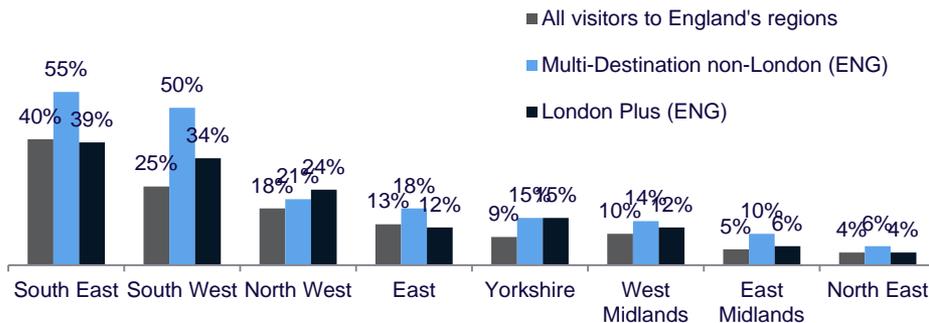
- The Australian visitor stays considerably longer in England. 41% stay for over two weeks. The additional time spent in England is predominantly outside of London.
- Australian and US visitors to England are more likely to conduct a multi-country trip – 54% of Australian visitors and 32% of US visitors combined their stay in England with a stay in another country (before or after).

Considerations:

- The opportunity for longer tours involving multiple parks (>2) appears greater for the Australian market. But we must understand the volume who are already on packaged tours.
- While those from the US typically stay between 7-14 nights, the pull of London is strong (only 29% of visits to the rest of England). A package including London and 1 National Park might be more appealing.
- For our European neighbours, typical length of stay is less than 7 nights – so proximity of National Parks packages needs to be considered.

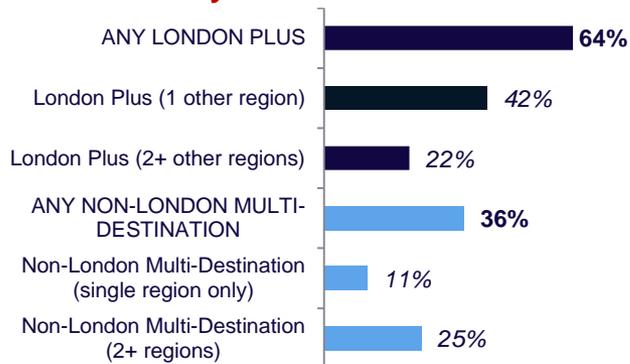
Only 9% of inbound visitors to England are doing multi-destination holidays in England, of which 47% visit 2 or more regions in England outside of London

Regions stayed in by England multi-destination holiday visitors



- 6% of all holiday trips to the UK are London Plus another England destination and a further 3% are non-London multi-destination trips of England.
- Visitors from US and Australia are more likely to be London Plus visitors (+1 or more regions) while visitors from Germany are more likely to be visiting multi-destinations outside of London
- The South East (40%) and South West (25%) are the two most common regions visited as part of any type of holiday trip – and are the most common regions visited in combination. North West and Yorkshire has the second most visitors in combination.

Number of regions stayed in by England multi-destination holiday visitors



Regional visit combinations for England's multi-destination holiday visitors – all visiting 2 or more regions outside of London

	North West	Yorkshire	West Mids	East Mids	East	South West	South East
North East	4%	4%	1%	1%	2%	2%	1%
North West	-	13%	6%	3%	5%	10%	9%
Yorkshire	-	-	4%	3%	5%	8%	7%
West Midlands	-	-	-	2%	4%	9%	9%
East Midlands	-	-	-	-	2%	3%	4%
East	-	-	-	-	-	6%	11%
South West	-	-	-	-	-	-	37%



How to differentiate and
optimise the National Park
Opportunity

Gateways & Connectivity

Encouraging use of regional gateways is key to get visitors to go beyond London and explore all our National Parks

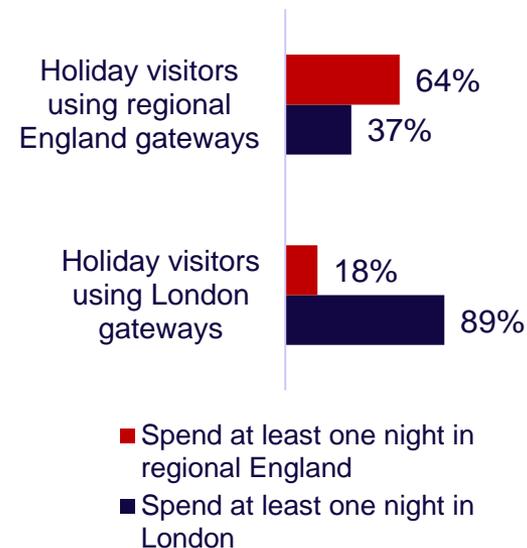
- The majority of visitors to England use London or the South East as their gateway – and tend to stay near that gateway region. Rail and Seaports are a popular way of getting to the UK from the European destinations. The launch of the direct Eurostar services from the Netherlands may increase this further.



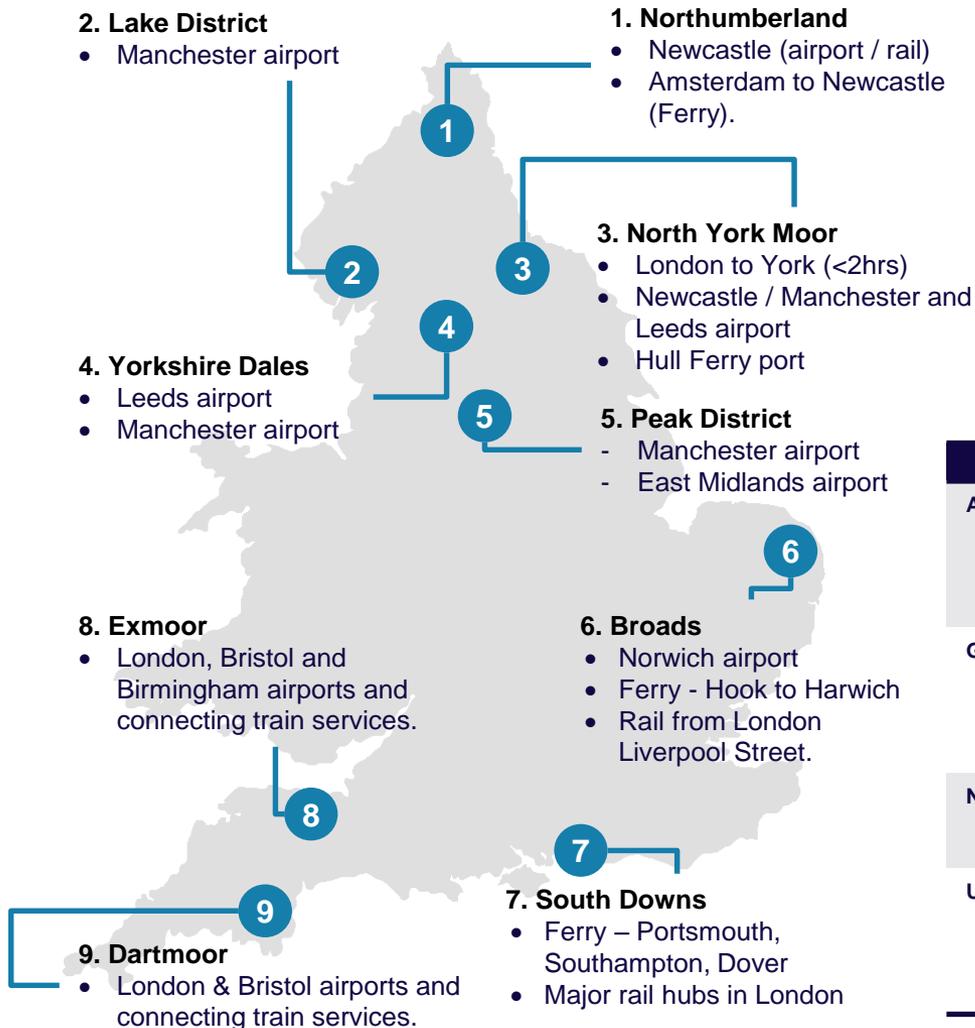
Gateway mode (UK Holiday Visitors)



Where do they stay?



Collectively National Parks can be accessed through all major gateways. There are opportunities to promote certain Parks to each target market



Opportunities

- Long-haul travellers come either direct into London/Manchester and also come in to other regional gateways via Europe.
- Partnerships with Emirates will help further connections from Australia to key regional hubs.

Challenges

- Inbound visitors skewed to London / South East region – greater focus on regional packages / airports required (EU markets).

	Main Gateways/Modes	Opportunities
Australia	<ul style="list-style-type: none"> Heathrow Manchester Newcastle Eurostar 	<ul style="list-style-type: none"> South Downs Peak District Yorkshire Dales North York Moors Lake District
Germany	<ul style="list-style-type: none"> Birmingham Manchester Stansted Seaports 	<ul style="list-style-type: none"> South Downs Peak District Yorkshire Dales North York Moors Lake District
Netherlands	<ul style="list-style-type: none"> Seaports Newcastle 	<ul style="list-style-type: none"> Norfolk Broads North York Moors South Downs
US	<ul style="list-style-type: none"> Heathrow Manchester Eurostar 	<ul style="list-style-type: none"> South Downs Peak District Yorkshire Dales North York Moors Lake District

While there are number of gateways for each National Park site, direct connectivity remains a challenge

- Every Park is accessible but the time taken from major hubs and the best mode of transport to use for the 'last mile' is often hard to find and unclear as on the majority of websites, it appears to be aimed at domestic visitors.
- Aiding discoverability of this information and making it easy to understand for international travellers is key.
- While there are station collection services planned from some hotels this is unlikely to be on offer for all types of accommodation, so alternatives need to be clear.

Exmoor National Park



North York Moors

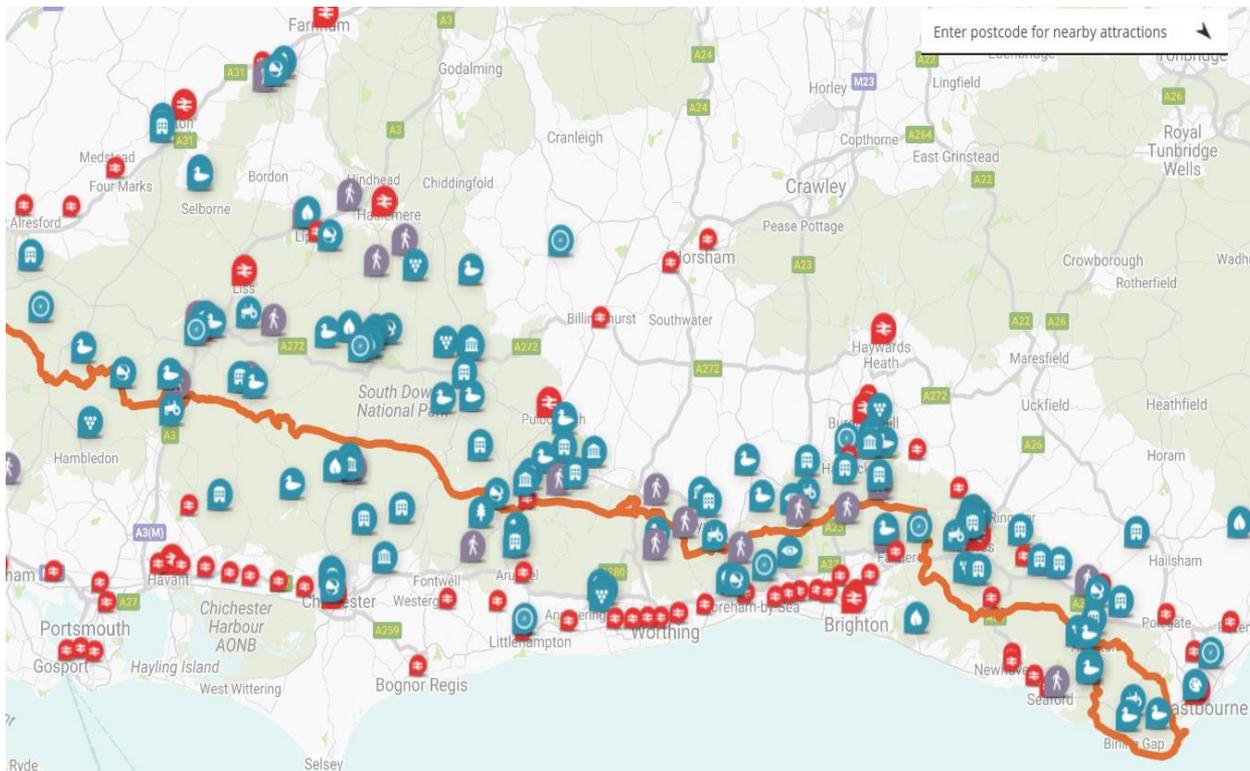
Travelling from overseas?



[Click on map to view larger version \(pdf\)](#)

Our National Parks account for 9.3% of England's landmass. A huge area! Given this, and the lack of knowledge of regional England it is important we provide clarity on the best places to enter our Parks

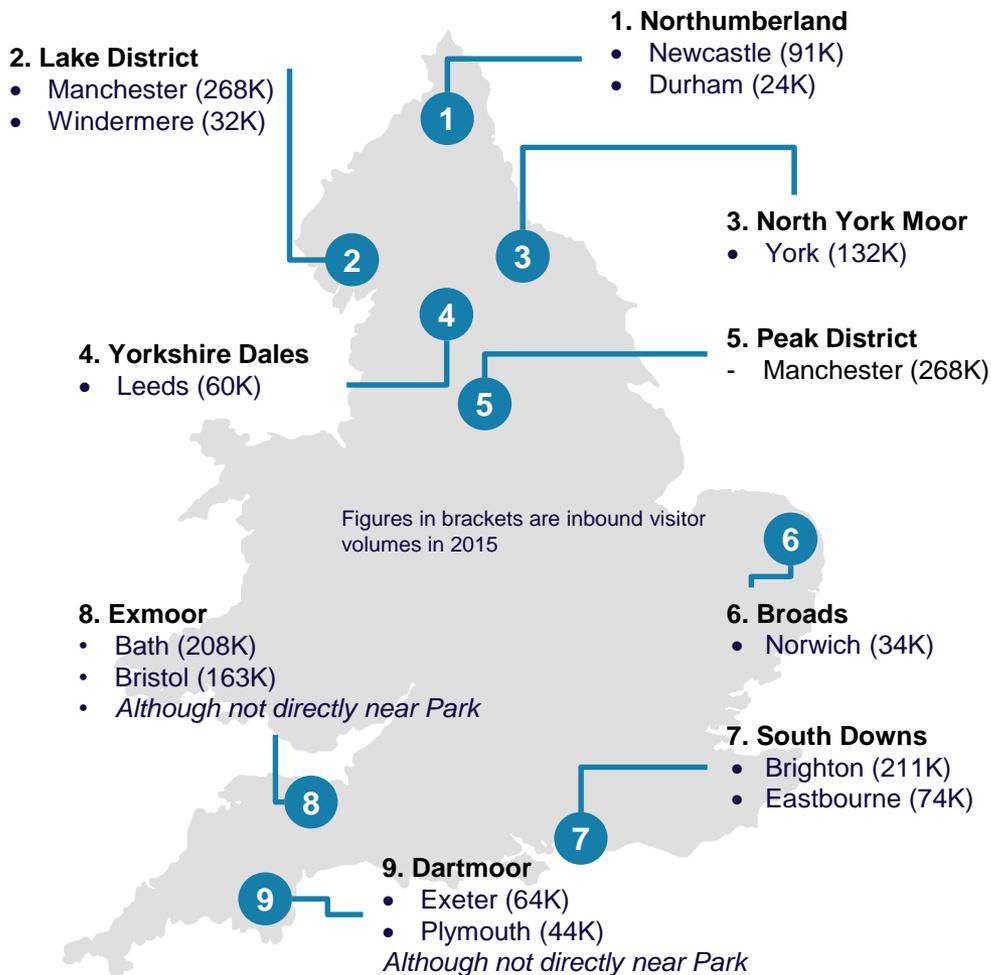
South Downs Example



Considerations:

- The South Downs is an expansive area – and there are good connections from London to key towns / locations on the routes (e.g. 1hr to Brighton). Key transport links and/or journey times are not always clear for international visitors.
- Identifying the best start points for individual locations coupled with experiences around that area will help drive inbound travellers – both for short and long stay breaks.

There are a number of cities across regional England that could provide a good start point for visitors to access our National Parks



Considerations:

- You may also want to consider partnerships with Heritage Cities as well as London and Partners to promote the National Parks experience as an add-on to their existing offers.

Providing targeted information by market and simplifying the last mile and Park entry points for inbound traveller is key

Less reliance on itineraries where driving / hiring cars is required, especially among visitors from the US

- 48% are nervous about driving in the UK.
- Those from the US (54%) are most nervous about driving in the UK.
- Those in Germany are less nervous (40%).
- 20% of Australians visiting Britain have hired a car.
- This affects certain National Parks more than others (e.g. Exmoor, Lake District); for International Travellers there might need to be less emphasis on travelling by Car in the 'how to get there section'

Providing clarity on key entry points to our Parks and simplifying the last mile for inbound travelers is the key for National Parks

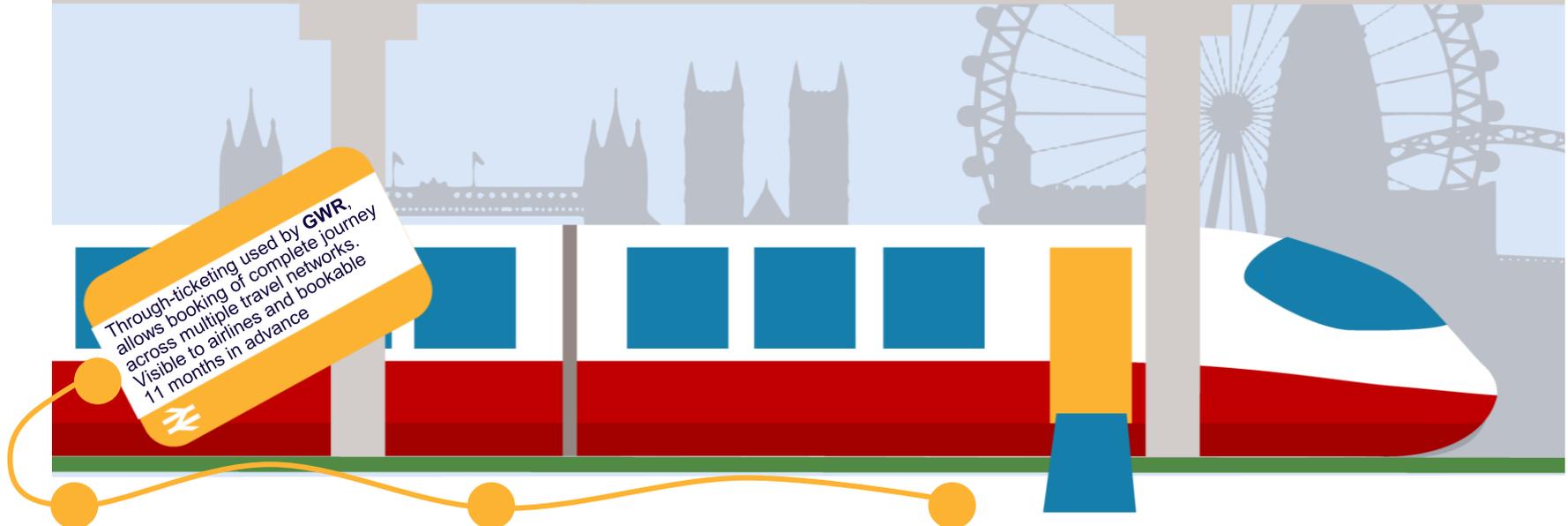
- For destinations that need to be reached using public transport (rail, bus or coaches), the lack of detailed information is a barrier to international travellers:
 - They wouldn't know how to get outside of London
 - Over-estimate journey times between destinations
 - They don't speak the language
 - They don't have confidence
- Particularly among visitors from the US, there is a perception that travel is too expensive outside London.
- However, inbound visitors who have experienced our rail system are generally positive – those from US and Germany are slightly more positive

Potential Actions to Consider:

1. Highlight the best entry points for each Park by market
2. Simplify and provide targeted information (via your website) on public transport options for each target market
3. List travel times from major hubs to your destination(s)
4. Promote BritRail passes and pre-booking e.g. highlight that booking trains ahead reduces cost considerably
5. Promote off-peak/shoulder seasons when transport is quieter

The Final Mile – Local and International Case Studies

Case Studies



- Marylebone & Bicester Village** – helping visitors from GCC and China with:
 - announcements, staff and signage, support in Mandarin & Arabic
 - Luggage drop-off and pick-up services
- ScotRail:** VisitScotland developed story ideas, securing press trip participation, developing media collateral and creating a marketing campaign. Using a Borders Railway Toolkit the tourism industry are encouraged to use their own platforms to spread the tourism message far and wide.
- International examples:**
 - At **Zurich** railway station, all information, including timetables, is available in four languages.
 - **Lisbon** uses a system of contactless smartcards to link trains, buses and tram services.
 - Larger hotels in **Amsterdam** have display screens showing live departure times and platform numbers at the city's main railway station.

- Promote BritRail Passes and M-ticketing BritRail Passes** - provide easy and cost-effective rail travel for a single fixed price. They enable international visitors the flexibility to travel across Britain, using unlimited trips on a travel day. A choice of seven different passes is available; one covers the whole of Britain while others cover specific geographic regions. They are only available to international visitors and cannot be purchased in Britain.
- As part of a Discover England Fund project, the BritRail England M-Pass covering stations in England has been launched in April 2017. This will change the paper ticket to a smartphone or tablet QR code and will improve the overall user experience. Already in the first quarter (April 17 – June 17) 35% of BritRail England consecutive passes are M-Passes.



How to differentiate and
optimise the National Park
Opportunity

Travel Trade Partnerships

Travel Trade – SWOT

Strengths

- History & Heritage are key interests – refining the Living History Experience concept to be unique
- The countryside, including walking, is strong esp. in Germany. Combined with heritage/history this could include villages, gardens etc.
- The chance to experience local culture & lifestyle
- Scenery & countryside
- South Coast, Devon Cornwall & Cotswolds have best awareness
- Interest in rural England and the English way of life (esp Germany)
- Personalisation is a growing trend

Weaknesses

- London dominates as destination
 - Lack of awareness beyond London, esp. North
 - Great diversity of images – but that makes somewhat unfocused
 - Accommodation is seen as a 'fundamental' barrier (see following)
 - Transport concerns (see following)
 - Perception of English food is negative
 - Scotland and Ireland are competitors in this context with strong appeal
 - Inflexibility of destinations to deal with groups, flex opening times, access for coaches etc.
 - England seen as expensive for accommodation, food attractions & travel
- Availability & capacity – hotels don't provide fixed rates and allocations in advance
 - Poor quality and excessive cost
 - Lack of flexible/twin rooms
 - Self-catering difficult to book
 - Poor service standards and welcome
 - Lack of regional flights
 - Seasonal lack of ferries
 - Nervousness of left-hand-drive,
 - Rail issues (price, gaps, trains etc.)

Opportunities

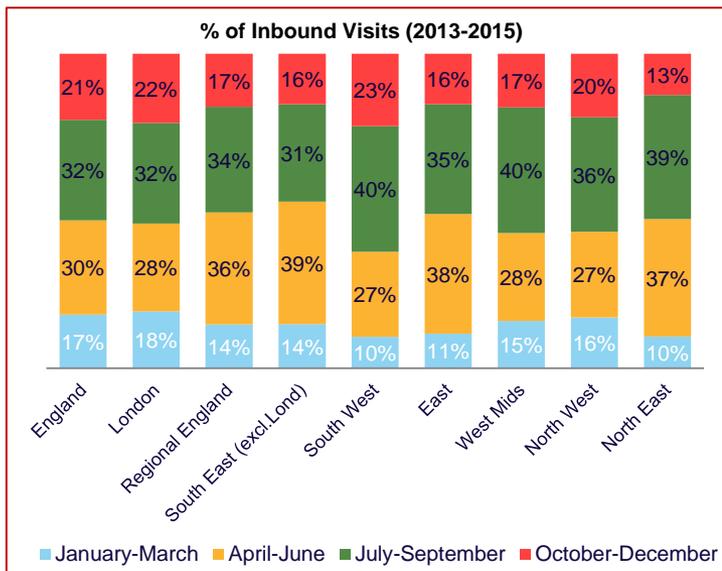
- Tap in to traveller wants: 'Experiential trips' & 'Off the beaten track' (esp. Australia)
 - Brexit – short term opportunity (favourable exchange rate)
 - Millennials (NL & US) – time poor and happy to be 'packaged'
 - Culinary experiences – offering distinctly English food
 - Offer distinctive accommodation (castles – US, country cottages – FR)
 - More developing of the existing offer rather than radical new (see following)
 - Clear transport information and support
 - Raise awareness through joint marketing
- Trade rates
 - Price stability
 - Release periods on room allocations
 - Centralised booking mechanisms
 - Single point of contact
 - Make use of DMCs
 - Greater language capability among handlers/guides (French & German)

Threats

- Unwilling to promote a product with unproven demand
- Midlands and North seen as difficult to sell
- Past bad experience of trying to sell Central and Northern England
- Brexit – Europeans may feel 'unwelcome' and concerns around Visa's etc.
- London and the South dominate - good for some National Parks- not for others
- Good transport is required with regional access

Hotel occupancy may be a limiting factor and is something that will need to be addressed with the travel trade

- Overall visitor volumes naturally skew towards the spring / summer season.
- The winter months are unlikely to attract a high visitor volume travelling beyond London given the range of outdoor activities and the perceived barrier of the weather.



Source: IPS via Discover England Fund 'England's Gateways' report, 2017

Season of visit by country of origin to England (all England). IPS 2015	Australia	Netherlands	Germany	US
January - March	10%	6%	7%	8%
April - June	25%	37%	36%	34%
July - September	49%	39%	43%	43%
October - December	16%	18%	14%	16%

Source: Discover England: summary insights on overseas visitors to England's regions

Hotel occupancy may be a limiting factor to further peak growth:

- Room occupancy ranges from 64% - 84% over the past year.
- Higher at weekends:
 - Weekend July '17 - 73% bed occupancy / 88% room occupancy
 - Weekdays - July '17 54% bed occupancy / 83% % room occupancy
- Overall 2% increase in demand, with supply increasing at a similar rate

England Occupancy 2017



Source: VisitEngland England Occupancy Survey 2017



How to differentiate and
optimise the National Park
Opportunity

Planning & Booking

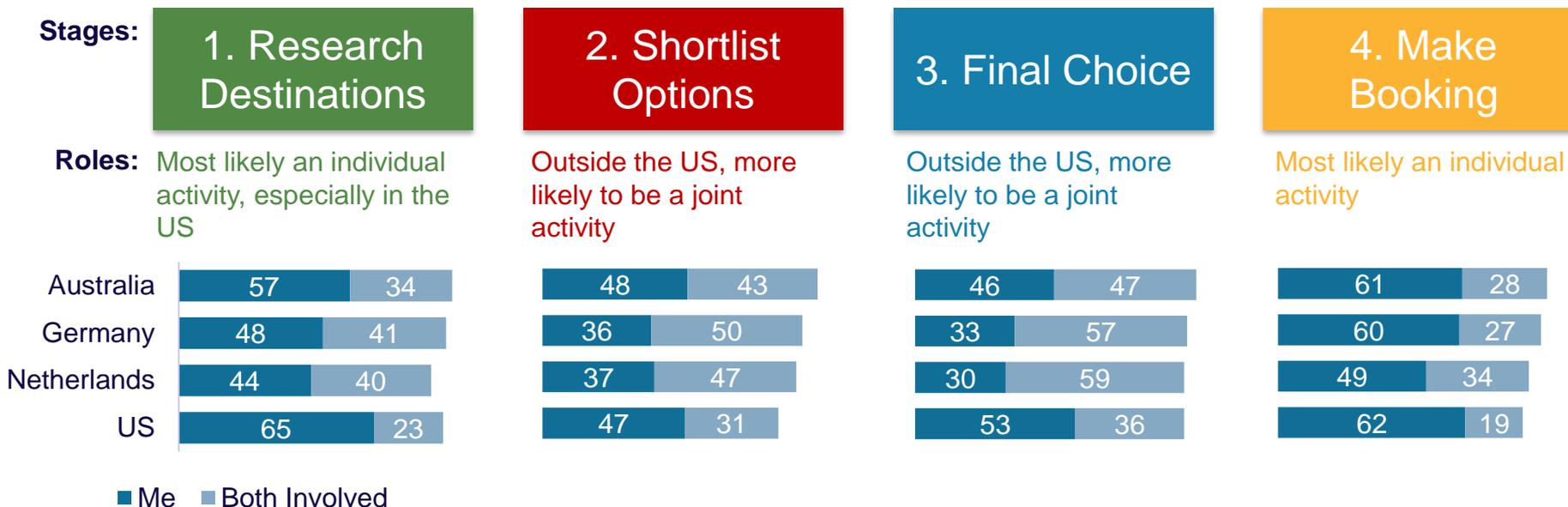
The planning stages: There are four stages to the general holiday planning process; responsibilities differ across these stages by gender and market

- Finalising the holiday (final choice or booking) is more likely to be carried out by men. Those aged 25-44 are more likely to say that they make the final decision solely; however, making the booking varies less with age.
- There are no age or gender differences for researching destinations or shortlisting options. In the US and Australia, men are more likely to say they make the final choice.

Future Travel Trend – *Wishlisting*

Future travellers will expect to be able to more easily take the step from inspiration to purchase, by shopping directly from wish lists and a range of new interfaces such as smart TVs.

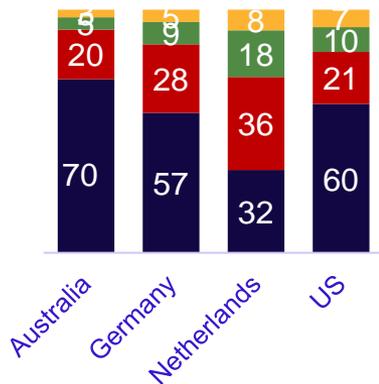
Key stages and roles in the holiday planning process (any destination):



The planning process: The length of the booking process varies greatly by market when booking a trip to Britain; lead time to booking is longest in Australia and shortest in the Netherlands. Timing of marketing campaigns will need to reflect this

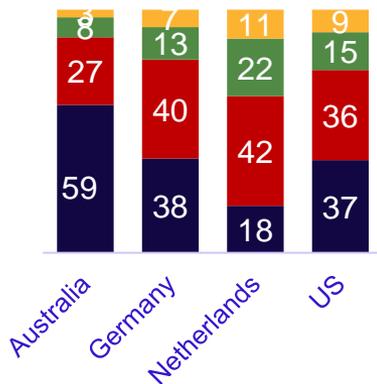
Started thinking about their trip (%)

- Apart from the Netherlands, most markets started to think about their trip at least 6 months in advance.
- In the Netherlands, around a third of visitors only started to think about it 3-6 months in advance.



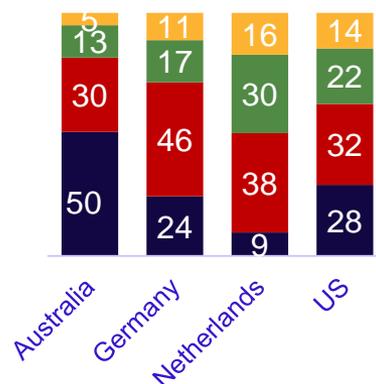
Decided on the destination (%)

- Typically between 3 and 6 months prior to the visit.
- Although those in Australia are more likely to have decided 6 months in advance.



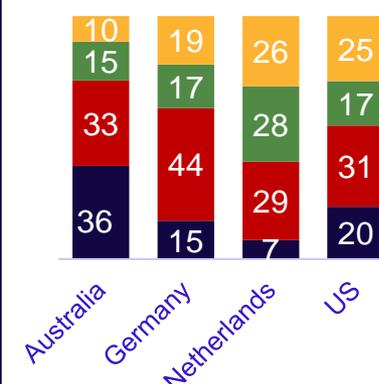
Looked at options / prices (%)

- Typically between 3 and 6 months, apart from in Australia.
- Those in the Netherlands only start to review options / prices in the last 2 months.



Booked the trip (%)

- Typically booked less than 2 months in advance of visit, apart from those in Australia.
- Those in Germany are most likely to have booked 3-6 months in advance, with Australia having the longest lead time overall.



Age: 65+ year old's are most likely to decide furthest in advance across all the stages. The majority of those in the target group (45+ year olds) have booked between 3 to 6 months in advance.



Key influencers: Online and offline influences both play a role influencing destination of choice

- ‘Word of mouth’ is the biggest influence on destination of choice across all target markets except in the Netherlands .
- Those in the Netherlands are more likely to rely on search engines and accommodation websites. Australians and Americans are slightly more reliant on review websites.

Target Age Group Differences

45-64 year olds are more likely to use online sources – but word of mouth is top influencer.

65+ year olds are more likely to say they **were not influenced** by any online (32%) or offline (30%) sources. Word of mouth is most powerful among this group.

Market Top 5 Sources of Influence on destination

	Australia	Germany	Netherlands	US
Word of mouth (friends or relatives)	1	1	3	2
Search engines (e.g. Google)	3	2	1	2
Price comparison websites	4	3	4	4
Traveller review websites (e.g. TripAdvisor)	2	5	5	1
Accommodation / hotel website	5		2	
A travel guidebook		4		4

Future Travel Trend – Conversational Commerce

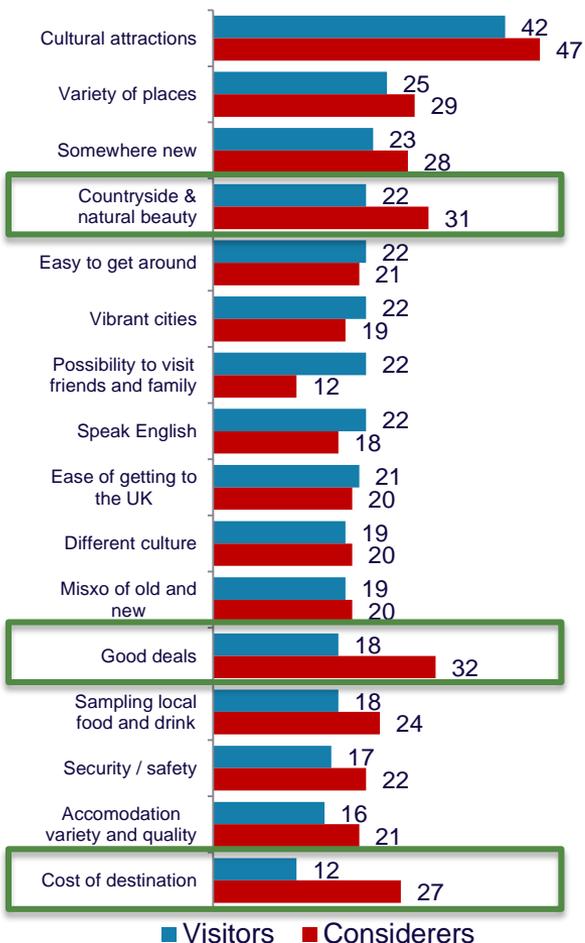
Making enquires about or booking tourism products will be easier than ever for future travellers, as they won't even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.

“We communicate with our travel agent via WhatsApp and send everyone the info of the trip also via WhatsApp. I won't sign into any website but would go through this conversational process with a trusted partner, then later on go to the agency just to swipe the credit card”.

MALE, 64, GERMANY

Choice / Motivators to visit Britain: Cultural attractions are a key motivator but our countryside is a strong motivator among considerers followed by cost

Top Motivators to Visit Britain (%)



- Across each target market, cultural attractions are the main motivator for visiting Britain across visitors and considerers.
- Countryside and natural beauty is among the top 3 reasons for all target markets.
- There are potential barriers which could be used as opportunities in your messaging i.e. it's safer in the countryside; cheaper outside London etc.

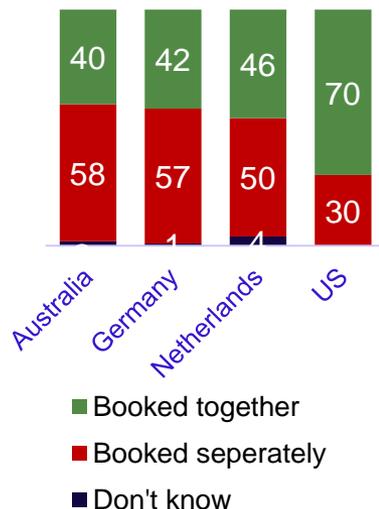
	Top 3 Motivators	Potential Barriers*
Australia	<ul style="list-style-type: none"> • Cultural attractions (44%) • Visiting friends / relatives (32%) • Countryside / natural beauty (31%) 	<ul style="list-style-type: none"> • Different culture (11ppt lower than avg) • Contemporary culture (7ppt)
Germany	<ul style="list-style-type: none"> • Cultural attractions (49%) • Variety of places (41%) • Countryside / natural beauty (38%) 	<ul style="list-style-type: none"> • Cost of destination (9ppt lower) • Security / Safety (8ppt lower)
Netherlands	<ul style="list-style-type: none"> • Cultural attractions (44%) • Countryside / natural beauty (36%) • Vibrant cities (31%) 	<ul style="list-style-type: none"> • Security / Safety (13ppt lower than avg) • Ease of getting around (10ppt lower)
US	<ul style="list-style-type: none"> • Cultural attractions (38%) • Countryside / natural beauty (28%) • Variety of places / Easy to get around (27%) 	<ul style="list-style-type: none"> • Ease of getting to the UK (4ppt lower)

* Biggest gaps to all country average for motivations

Making the booking: Travel and Accommodation is often booked separately when booking a holiday, apart from the US where it is more likely a package

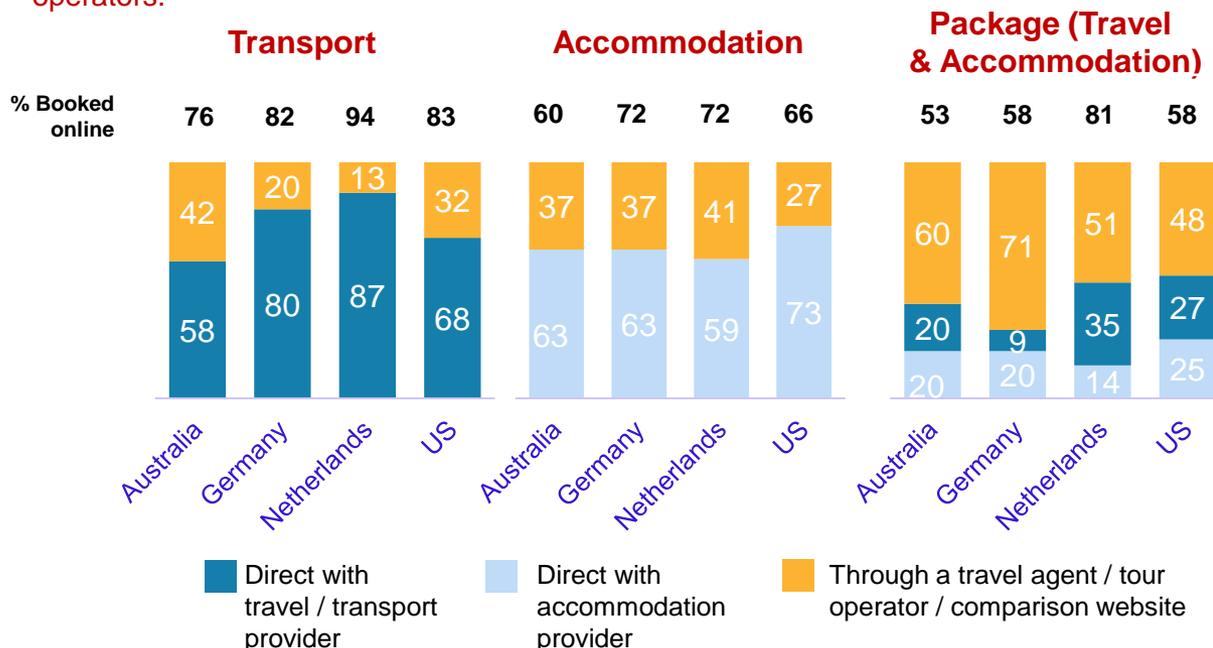
Travel & Accommodation Booking (%)

- 70% of those in the US booked their holiday to Britain as part of a package.
- In the other markets, visitors are more likely to book travel and accommodation separately.



Channel used to book trip elements

- Typically when transport and accommodation are booked separately, they are booked direct with either the travel / transport provider or direct with the accommodation provider.
- Package holidays are typically booked through travel agents.
- The majority of trips to Britain were booked online, especially in the Netherlands. Australians are much less likely to book trips online – there is a greater reliance on travel agents / tour operators.



Accommodation: Reducing the hassle of finding good quality accommodation for visitors and re-engaging with Travel Trade is key

Key Challenges:

From a traveller perspective, **accommodation is not seen a key motivating factor and can be a hassle to find:**

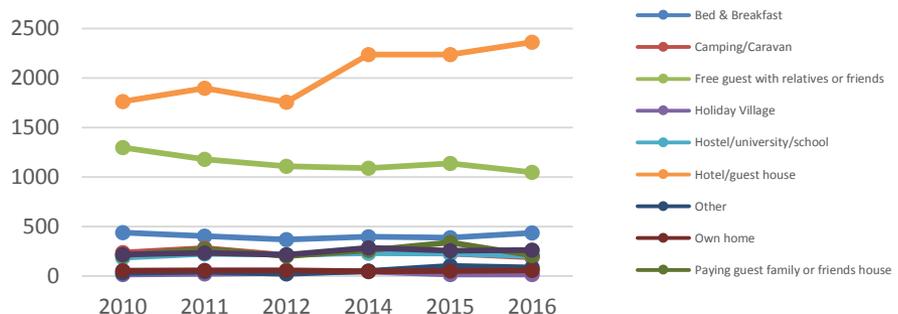
- Accommodation is not a motivator for visiting England; Only 16% of visitors see the variety & quality of accommodation as a motivator.
- In the European markets being targeted, over 50% book travel and accommodation separately.
- We understand that National Parks are focused on hotels with >50+ rooms.

The Travel Trade in the focus markets are quite critical of accommodation in England and see it as a barrier:

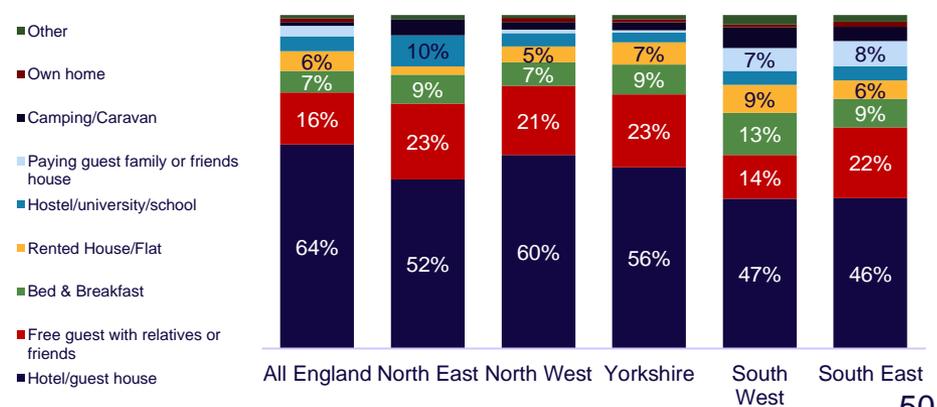
- Availability & capacity – hotels don't provide fixed rates and allocations in advance
- Poor quality and excessive cost
- Lack of flexible/twin rooms
- Self-catering difficult to book
- Poor service standards and welcome

- Overall trend for England Holiday visits (excluding London) shows the biggest increase is in hotels/guest houses.
- Potential for growth in alternative accommodation – bed and breakfast, camping etc.

Accommodation Trends (outside London)



Accommodation Type Stayed in – All England and Regions (2016)

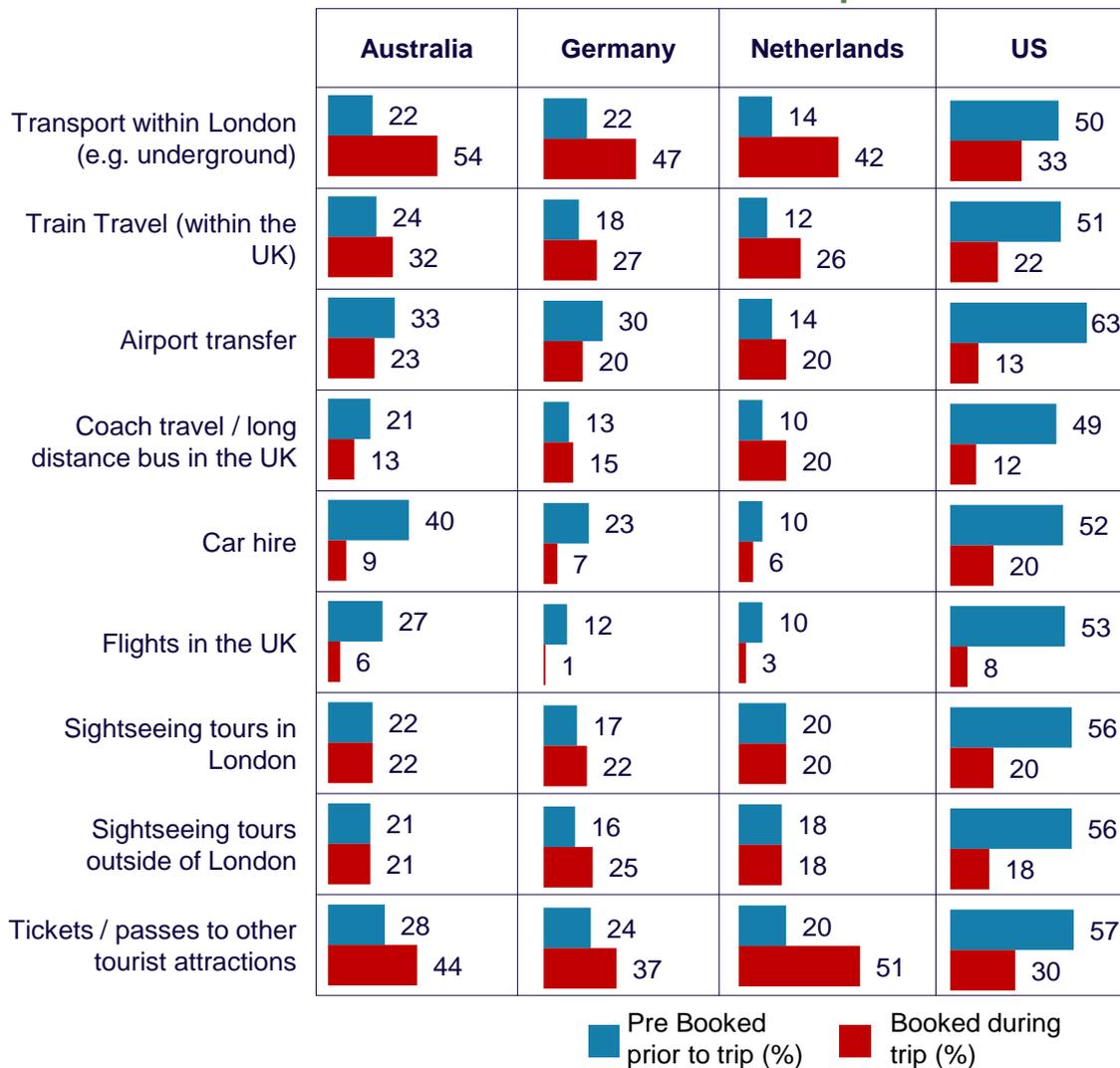
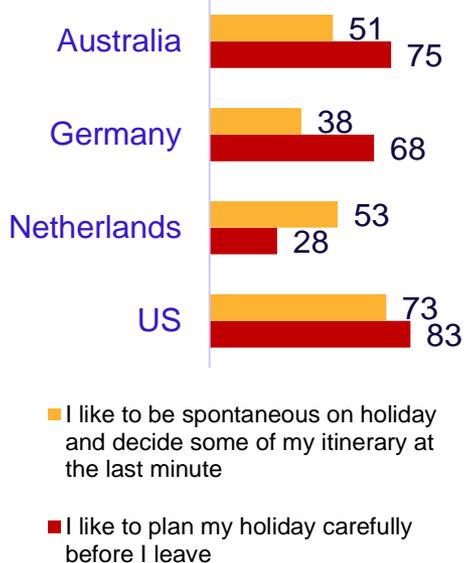


Bookable products: Those from US are more likely to pre-book their travel arrangements and activities – this is in stark contrast to the Australians and Germans

Pre-bookable transport / activities

Itinerary planning vs. spontaneity

- Those in the Netherlands are much more likely to be spontaneous whilst on holiday, especially compared to the Germans
- While those in the US like to have some things planned – they also welcome a certain amount of spontaneity in the itinerary





VisitEngland

XV

Insight

Summary –
key take-outs



How can National Parks differentiate its offering?

1. Themes & Activities

- While National Parks are within the top 10 of activities visitors to England would consider, other activities have a greater pull.
- Creating immersive experiences is a clear way to differentiate the National Park offering, not only from competitor destinations (including London) but also from other rural England experiences.
- The crossover with other activities in consideration among those who would visit a National Park highlights which of the 6 themes might be most successful:

1) Living History: The top 3 to 4 activities inbound visitors strongly consider tend to centre on history. There is cross-market appeal for Living History and as a concept it fits well with future traveller trends *'The Pursuit of Real'*.

2) Food Experiences: While not the sole motivator for visiting England, trying food & drink specialities is appealing across all core markets. The right partnerships with local companies can offer unique experiences.

We understand that further research (concept testing) is underway to optimize these experiences.

2. Multi-Park Experiences

- While we do not fully understand the appetite for multi-park experiences through available research, long haul visitors are more likely to have more time in their itinerary and be more attuned to multi-location breaks
 - Visitors from US and Australia are more likely to be London Plus visitors (+1 or more regions) while visitors from Germany are more likely to be visiting multi-destinations outside of London.
 - The South East (40%) and South West (25%) are the two most common regions visited as part of any type of holiday trip – and are the most common regions visited in combination. North West and Yorkshire has the second most visitors in combination.
- Testing this concept, particularly in Germany, is recommended to understand the overall appeal.

How can National Parks optimise it's offering?

3. Gateways & Connectivity

- Encouraging use of regional gateways is key to get visitors to go beyond London and explore all our National Parks.
 - The majority of visitors to England enter through London or the South East – and tend to stay near that gateway region.
 - Based on recent regional gateway data, there are opportunities to promote certain Parks to each target market (i.e. Manchester is a key gateway for Australian visitors – so Peak District, Lake District could be promoted)
 - Two thirds of multi-destination breaks in England involve a stay in London – a partnership with London & Partners should be considered for London Plus inbound visitors.
- Collectively National Parks can be accessed through all major gateways but the last mile remains a challenge.
 - Every Park is accessible but the time taken from major hubs and the best mode of transport to use for the last mile is often hard to find and unclear as in the majority of cases it appears to be it is aimed at domestic visitors.
 - Aiding discoverability of this information and making it easy to understand for international travellers is key.
- Given the lack of knowledge of regional England it is important we provide clarity on the best places to enter our Parks
 - Identifying the best start / entry points for individual locations coupled with experiences around that area may help drive inbound travellers – both for short and long stay breaks.
 - A partnership with Heritage Cities should also be considered given the close connections of some of the heritage cities to National Parks.

4. Travel Trade Partnerships

- It goes without saying that the travel trade have potential to encourage or discourage visitors – they are also a key ally in helping us promote regional England.
- There are many strengths in the National Park offering but there are some challenges to overcome:
 - Unwilling to promote a product with unproven demand, in particular the North seen as difficult to sell
 - Past bad experience of trying to sell Central and Northern England
 - London and the South dominate - good for some National Parks but not for others
 - Accommodation is seen as a 'fundamental' barrier

How can National Parks optimise it's offering?

5. Planning & Booking

- The length of the booking process varies greatly by market; the lead time to booking is longest in Australia and shortest among visitors from the Netherlands.
 - Given the seasonality of visits to England, timings of campaigns across markets will differ.
- Online and offline influences both play a role influencing destination of choice.
 - 'Word of mouth' is the biggest influence on destination of choice across all target markets except in the Netherlands. Those in the Netherlands are more likely to rely on search engines and accommodation websites. Australians and Americans are slightly more reliant on review websites.
- Across each target market, cultural attractions is the main motivator for visiting Britain across visitors and considerers. Countryside and natural beauty is among the top 3 reasons for all target markets
 - There are potential barriers which could be used as opportunities in your messaging
- Travel and Accommodation is often booked separately, apart from the US where it is more likely to be part of a package.
 - Typically when transport and accommodation are booked separately, they are booked direct with either the travel / transport provider or direct with the accommodation provider.
 - Package holidays are typically booked through travel agents.
 - The majority of trips to Britain were booked online, especially in the Netherlands. Australians are much less likely to book trips online – there is a greater reliance on travel agents / tour operators
 - Reducing the hassle of finding good quality accommodation for visitors and re-engaging with Travel Trade is key
- There needs to be a greater understanding of how National Parks package their experience – providing flexibility and choice at the point of booking and whilst on holiday. Those from US are more likely to pre-book there travel arrangements and activities – this is in stark contrast to the Australians and Germans. Those in the Netherlands want the greatest spontaneity in their itineraries.

Further areas for consideration

1) Build a clear brand identity and positioning for National Parks

- Understand which of the 6 themes are most likely to resonate and drive inbound visitors – focusing on all 6 themes may dilute or confuse potential visitors on what the offer / experience is
- Assess whether the brand experience is sufficiently differentiated from other rural/outdoor experiences or consider further partnerships where there is overlap (i.e. Heritage Cities)
- How do we help inbound visitors imagine what the brand experience will deliver – what is it similar to but uniquely different from?

2) Developing a clear communication / channel strategy

- How do we further promote regional England? What bodies / partnerships are key to growing awareness of England beyond London?
 - Re-engaging with the travel trade and addressing known concerns is fundamental
 - Understand which specific channels (online / offline) will be most effective in increasing awareness of the National Parks offer - i.e. which Travel advice sites are most popular among the target segments in the US
 - Timing of any advertising campaigns will need to take into account booking lead times at a market level
- How do we simplify and tailor communication around the last mile for inbound visitors? Can we maximise the entry points of our parks based on recent visitor numbers?
- To what extent do we need to offer flexibility and choice around itineraries and booking activities at a market level?



Appendix

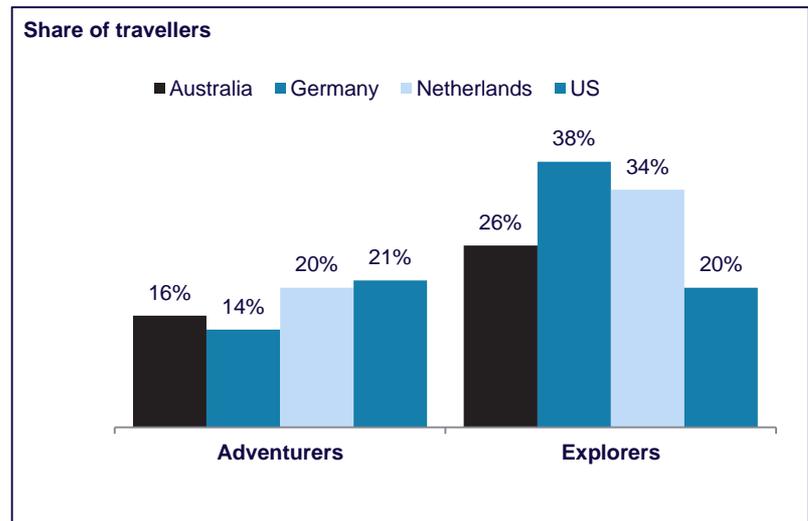
- Detailed segment profiles
- Data sources

Targeting the most appropriate segments

- National Parks have targeted **Outdoor Enthusiasts** and **Mature Experience Seekers**.

	Outdoor Enthusiasts	Mature Experience seekers
Profile	35-55 years Families/Empty nesters ABC1	50-65 years Empty nesters/(semi) retired
Key Markets	Germany, France, Spain	Australia, Germany, France, Spain
Defining attitudes & traits	Active, nature lovers, cycling, curious, off-the-beaten-track	Young at heart – new found freedom, keen to learn, see new places
Key interests	Walking, hiking, cycling, time close to nature	Healthy & active, time outdoors, walking/hiking, engaging with nature
Travel preferences	Beyond 'sunshine' countries, activity driven & value scenery, a sense of discovery	Active, cultured holidays with plenty of sightseeing
Holiday activities	Enjoying natural landscapes, getting close to nature, learning about culture/heritage/food, seeing the sights, meeting people	Time outdoors – walking, learning about local heritage & culture, trying a new activity, learning a new skill, sampling local food
Accommodation preferences	Not mainstream hotel chains Independent hotels, B&B, camping Quirky, close to nature	Accommodation with character

- Visit Britain have been working on a new segmentation, that provides even greater insight into profiles, travel attitudes and behaviours
- In this new segmentation, there are two segments that map closely to the previous segments. They are **Explorers** and **Adventurers** (see next slides for profiles).



Segment Targeting Summary – Two core segments, but opportunity to also reach Sightseers

	Explorers 	Adventurers 	Sightseers 	Buzzseekers 	Culture Buffs 
	<ul style="list-style-type: none"> • 55+ • Australia, Germany, France 	<ul style="list-style-type: none"> • 45+ 	<ul style="list-style-type: none"> • 55+ • USA 	<ul style="list-style-type: none"> • 18 - 34 • Australia, Germany, France, India, USA, Netherlands, Australia 	<ul style="list-style-type: none"> • 25 - 54 • China
	<ul style="list-style-type: none"> • Comfortable with who they are • Slower relaxed pace • Like to go places that don't attract tourists 	<ul style="list-style-type: none"> • Comfortable with who they are • Outdoors in natural landscapes • Off the beaten track • Seek out new experiences 	<ul style="list-style-type: none"> • Cities • Creatures of habit • Sensible 	<ul style="list-style-type: none"> • Seek new experiences • Action & excitement • Pay for once-in-a-lifetime • Trendsetters 	<ul style="list-style-type: none"> • Care about the image they project • Travel is reward for hard work • Demand worlds leading sights
	<ul style="list-style-type: none"> • Local food & drink • Rural life & scenery • Famous/iconic places • Outdoor leisure pursuits • Visiting parks & gardens 	<ul style="list-style-type: none"> • Local food & drink • Rural life & scenery • Famous/iconic places • History & heritage • Outdoor leisure pursuits 	<ul style="list-style-type: none"> • Local food & drink • Famous/iconic places • Experiencing city life 	<ul style="list-style-type: none"> • Famous/iconic places • Local food & drink • Challenge/action filled • Hands on learning 	<ul style="list-style-type: none"> • Local food & drink • Famous/iconic places
	<ul style="list-style-type: none"> • B&B/Self-catering 	<ul style="list-style-type: none"> • B&B 	<ul style="list-style-type: none"> • Mainstream hotel only 	<ul style="list-style-type: none"> • Airbnb, camp, alternative accommodation 	<ul style="list-style-type: none"> • Mainstream hotels/B&B
	<ul style="list-style-type: none"> • Friends & family • Movies, books, magazines & travel agents 	<ul style="list-style-type: none"> • Friends & family • Websites 	<ul style="list-style-type: none"> • Friends & family • Websites & travel agents • Deal-seekers 	<ul style="list-style-type: none"> • Friends & family • Trusted influential • Mobile- natives • Spontaneous 	<ul style="list-style-type: none"> • Friends & family • Travel in groups or families
	<ul style="list-style-type: none"> • Mature Experience Seekers • Outdoor Enthusiast 	<ul style="list-style-type: none"> • Outdoor Enthusiast • Mature Experience Seekers 	<ul style="list-style-type: none"> • Conservative Retirees 	<ul style="list-style-type: none"> • Young Active Explorers • Lifestyle Travellers 	<ul style="list-style-type: none"> • Lifestyle Travellers • Cultural Adventurers
	<ul style="list-style-type: none"> • Core target 	<ul style="list-style-type: none"> • Core target 	<ul style="list-style-type: none"> • More urban, but may be drawn in to iconic landmarks within parks 	<ul style="list-style-type: none"> • Would require more action activities & hands-on learning 	<ul style="list-style-type: none"> • Would need to promote famous/iconic places

EXPLORERS

AGE

- Most likely to be 55+ (58%)
- 18-24 (4%); 25-34 (8%); 35-44 (12%); 45-54 (17%); 55+ (58%)

KEY MARKETS

- Australia, Germany, France

GENDER

- 52% Female

DEFINING ATTITUDES

- Comfortable with who they are – unbothered how others see them
- Prefer holidays at a slower, relaxed pace
- Not bothered by brands or image
- Happy with what they have
- Like to go to places that don't attract many tourists

FAVOURITE TRAVEL ACTIVITIES

- Experiencing local food & drink
- Experiencing rural life & scenery
- Visiting famous/iconic places

UNIQUE TRAVEL ACTIVITIES (versus other segments)

- Experiencing rural life & scenery
- Outdoor leisure pursuits
- Visiting parks/gardens

GB LIKELY ACCOMMODATION (unique vs others segments)

- Bed & Breakfast
- Self-catering

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Movies, books, magazines & travel agents used
- 49% travel with one other



WHO ARE THEY?

They appear independent of social image – true to themselves, they are contented and enjoy holidays that offer relaxation and a relaxed pace. Nature lovers, they enjoy the outdoors as well as visiting the must see sites. Despite intense pre-planning, they embrace the unexpected, particularly the opportunity to go off the beaten track, meet locals and embrace local culture.

ADVENTURERS

AGE

- Over 45yrs (67%)
- 18-24 (8%); 25-34 (9%); 35-44 (18%); 45-54 (22%); 55+ (45%)

KEY MARKETS

Whilst Adventurers are not currently a priority in any of our markets, it is still a significant audience for us.

Adventurers tend to enjoy a very off the beaten path adventure e.g. heli-camping in an urban retreat – offerings which aren't traditionally offered in Britain.

Due to this, when they come to Britain they tend to behave more like a *Buzzseeker* or an *Explorer* and we will naturally pick them up when targeting either of these segments

DEFINING ATTITUDES

- Comfortable with themselves – don't care what others think
- Enjoy spending time outdoors and in natural landscapes
- Like to travel off the beaten track
- Like to seek out new experiences

GENDER

- 53% Male

FAVOURITE TRAVEL ACTIVITIES

- Experiencing rural life & scenery
- Experiencing local food & drink
- Visiting famous/iconic places
- Exploring history & heritage

UNIQUE TRAVEL ACTIVITIES (versus other segments)

- Outdoor leisure pursuits (long walks, cycling, boating)

GB LIKELY ACCOMMODATION (unique vs others segments)

- Bed & Breakfast popular

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Websites, especially 'all in one' ideas
- Tend to travel with one other



WHO ARE THEY?

Like to be away from the crowds and out of the spotlight, they are most comfortable exploring the intrepid outdoors and forging adventures that others (particularly others their age) might not be up for.

SIGHTSEERS

AGE

- **Over 55yrs (57%)**
18-24 (9%); 25-34 (7%); 35-44 (13%); 45-54 (14%); 55+ (57%)

KEY MARKETS

- USA

GENDER

- 52% Male

DEFINING ATTITUDES

- Prefer cities to countryside
- I know what I like and tend to stick with it
- Like to have a small group of really close friends
- Sensible
- Prefer stability

FAVOURITE TRAVEL ACTIVITIES

- Experiencing local food & drink
- Visiting famous/iconic places
- Experiencing city life

UNIQUE TRAVEL ACTIVITIES (versus other segments)

- Experiencing city life
- Attending a specific event

GB LIKELY ACCOMMODATION (unique vs others segments)

- Mainstream only (hotels, or inner city bed and breakfast)

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Websites and travel agents
- Often look for travel deals
- Most travel with one other (46%)



WHO ARE THEY?

Comfortable with who they are, but can still be quite uncertain when it comes to international travel, wanting to visit places and sites that are well known, safe and well resourced for foreign tourists. They are city tourists through and through – enjoying sites that are easy to find. Sensible, well planned, they like to avoid uncertainty, so will seek advice and reassurance in planning their trip.

Links to data sources

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