



VisitEngland™

# Discover England Fund Research Summary Report

Discover England's Great Walking Trails  
November 2017

## 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.



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

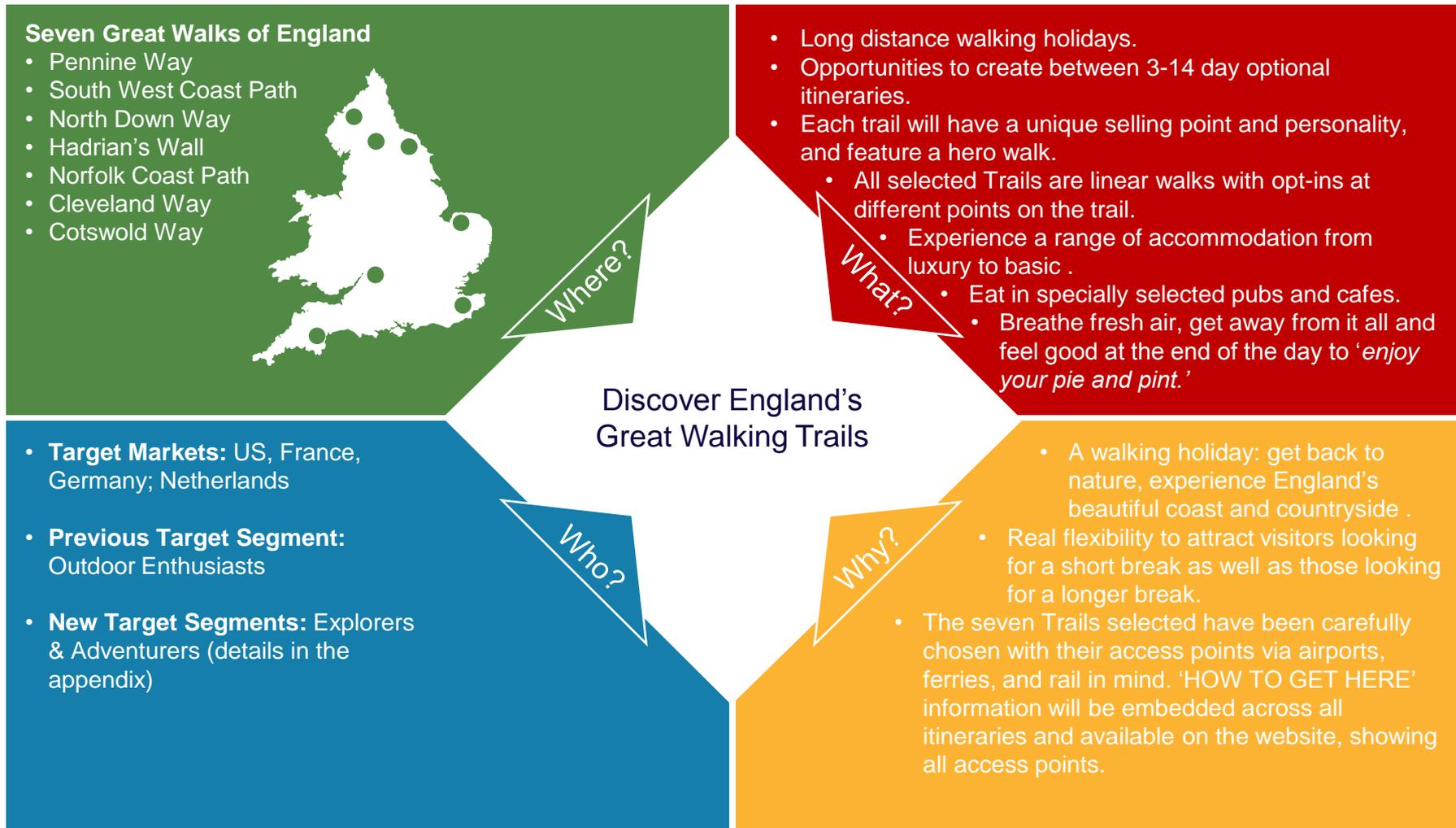
Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.



# Introduction



# Project overview



# The Essence of Great Walking Trails and Current Insight Needs

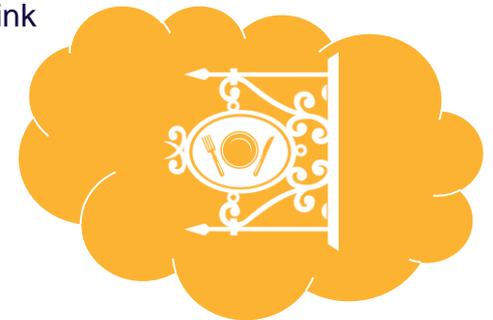
## Elevator pitch<sup>1</sup>

England's Great Walking Trails are beautifully curated Walking Trails through **the historic and charming English countryside** that get you **off the beaten track**, but never take you far from a classic **English pub!** Each walk is designed to give you **easy access to amazing views** and fresh air by day, but **cosy firesides**, great atmospheres and **traditional food and drink** by night. You'll rub shoulders with **colourful local characters**, enjoy the **beer** and walk in the footsteps of **England's rich history**. With itineraries from **3 to 14 days**, and a range of accommodation from **luxury to quirky**, all easily **bookable online** or at **travel agents**, there's something for everyone.



## Topics of most importance<sup>2</sup>

- Understanding the secondary markets (US and France in more depth)
- More specific targeting guidance for US market
- Potential to integrate with other projects
- Travel Trade engagement
- Language to use (Walk vs Hike)
- Which walks to target (given regional differences)
- Planned vs spontaneous behaviours (complete itinerary vs flexibility)
- In-trail app
- Role of food and drink



'England's Great Walking Trails – where walking is only half the experience'

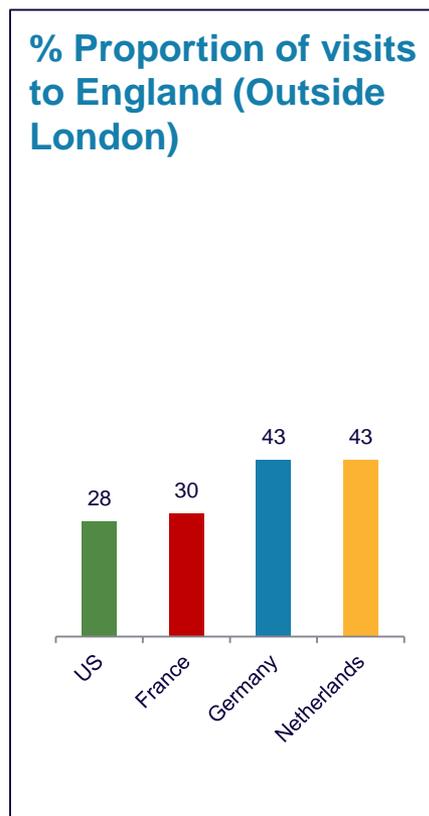
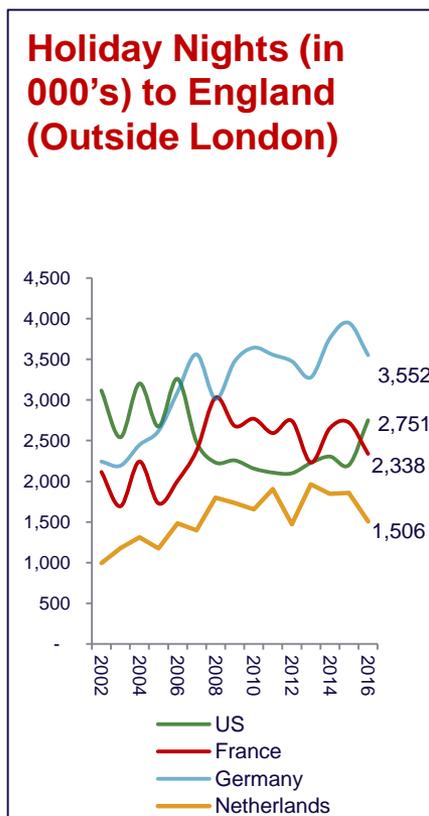
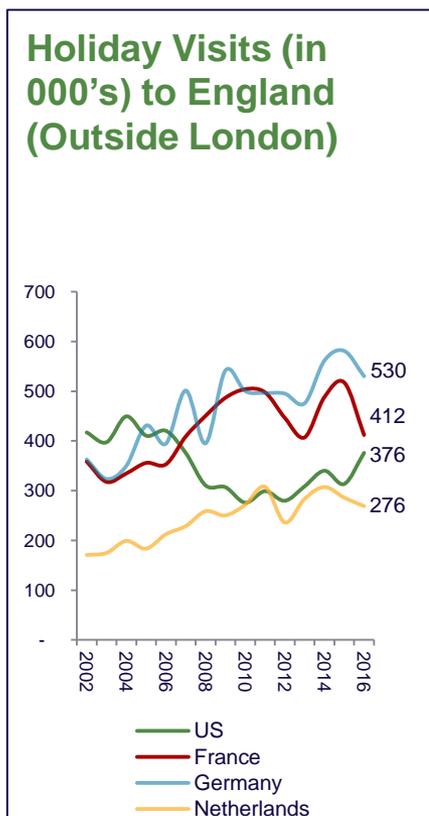


# Current Trends & Challenges



## Current Inbound Travel Trends to England (outside of London)

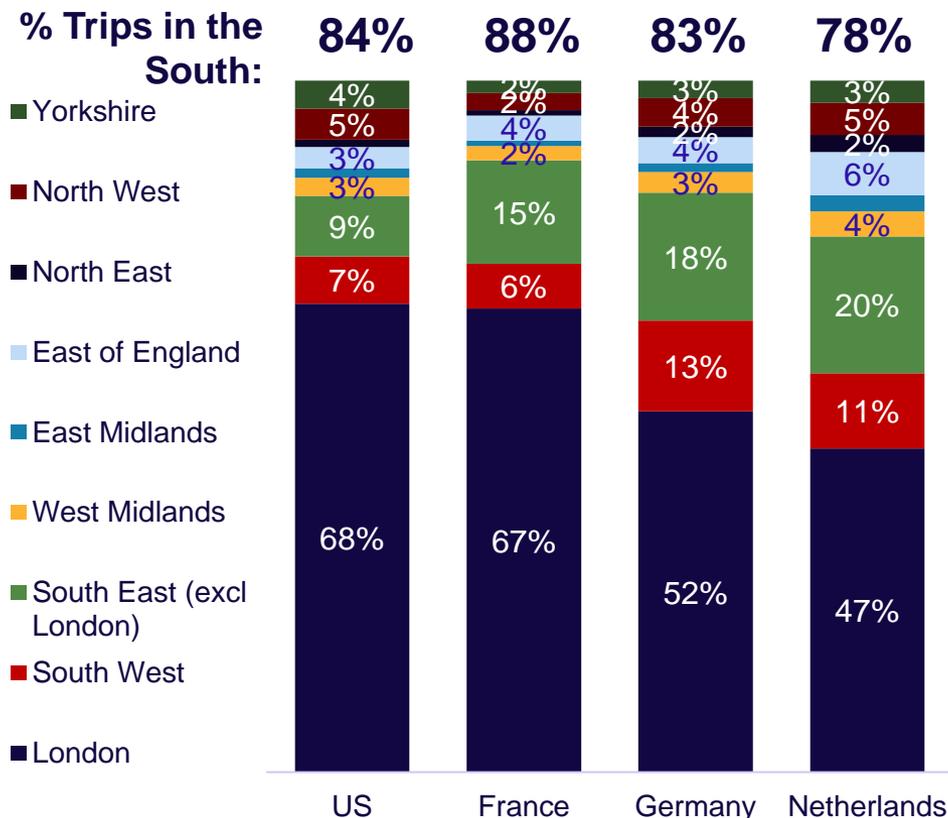
- Only 31% of all trips to England made by overseas visitors now involve a stay outside of London – the biggest challenge is to persuade visitors from US and France to venture beyond London.



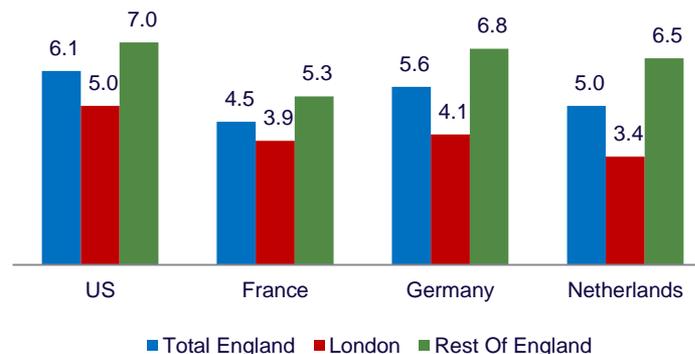
- US:** Visits and duration of stay to the rest of England increased in 2016 after a dip in 2015.
- France:** has seen a drop in visitor numbers and duration in 2016. Either general activity to encourage longer stays/higher spend is needed or focus on (very) short breaks to reinvigorate numbers.
- Germany:** Visitor numbers and duration of stay inbound from Germany have dropped in 2016.
- Netherlands:** Visits and duration have both declined and visits to the rest of England have also dropped, suggesting an opportunity to reinvigorate England as a destination.

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

**Holiday Trips (in 000's) to each region (2013-2015 avg)**



**Average number of nights stayed in England (2015)**



**Considerations:**

- Less than 22% in each target market venture further than the South regions. French visitors are least likely to travel to the North of England, reflective of their length of stay and gateways used.
- Longer duration trips can be promoted to the US traveller, either longer Walking Trails and/or combined with other products (e.g. City-based).
- Visitors from the European target markets typically stay a week or less, so shorter packages are likely to be more successful.

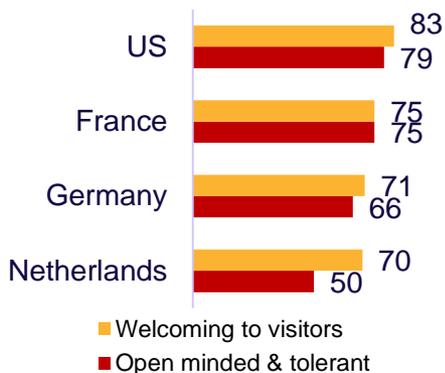
# Key challenges – Political, Economic and Social environment; Threat or Opportunity for Britain’s travel market?

## 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).

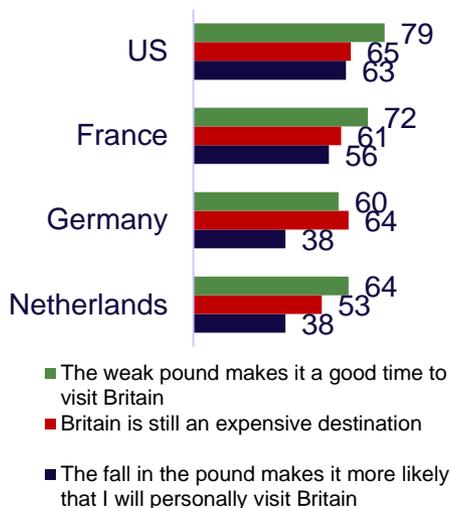
## Perceptions of Britain (%)



## 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.

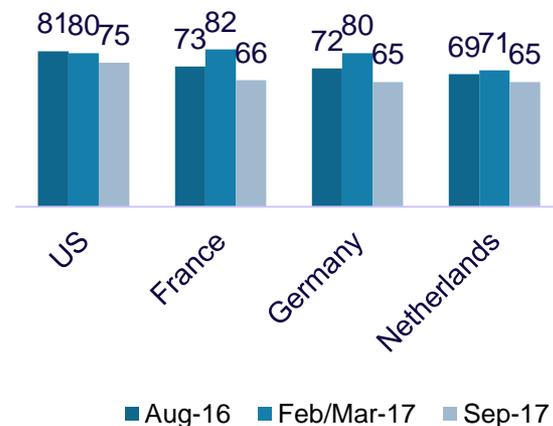
## Exchange Rate Impact (%)



## 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 (%)



# 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 visit to Britain:

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

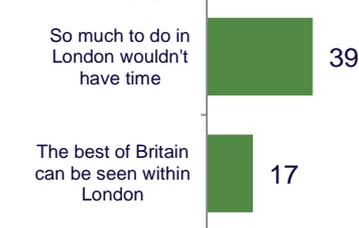
#### Reasons for not going beyond London (%)\*



### 2. Dominance of London

- The draw of London itself can deter them from going elsewhere in Britain
- London is a major gateway, particularly for France and 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.

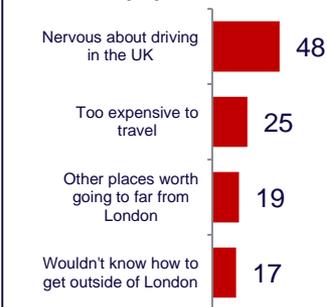
#### Reasons for not going beyond London (%)\*



### 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.

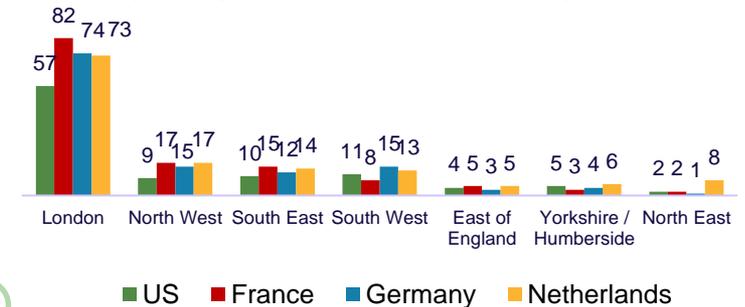
#### 3) And lastly, lack of available time for short stay visitors if starting in London

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

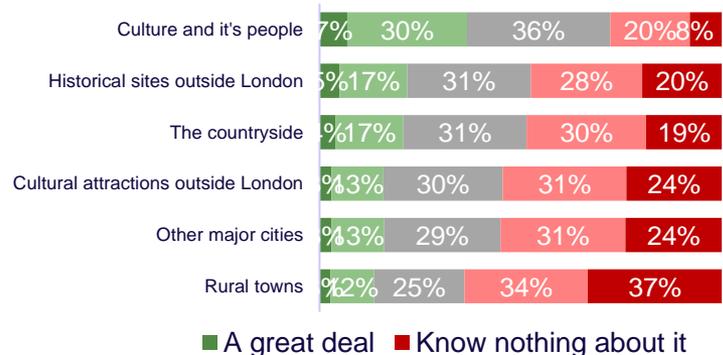
#### Considerations: Helping customers imagine regional England

Compare England offer favourably with similar, well-known 'regional' offers in other countries e.g. Cotswolds/ Tuscany, York/ Seville, Cornish coast/ Spanish Costas.

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



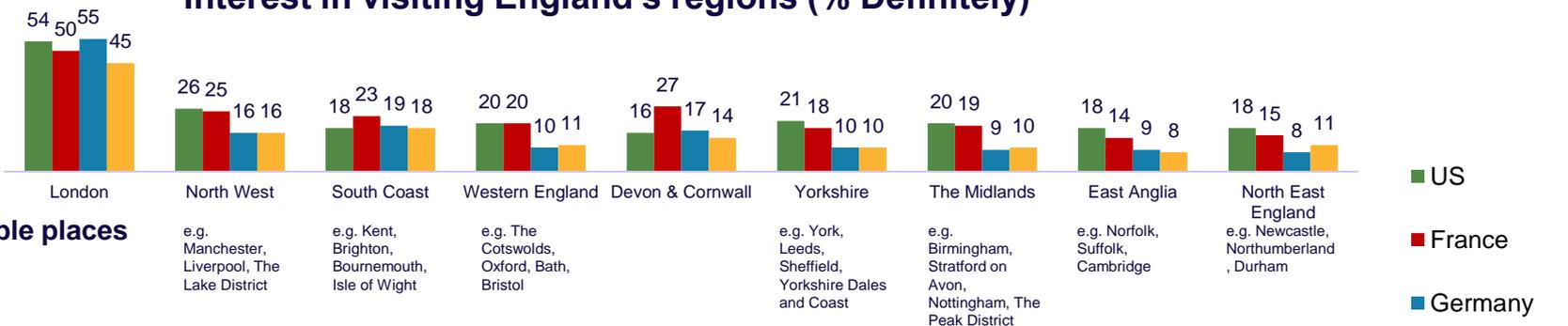
### What do you know about Britain outside of London?



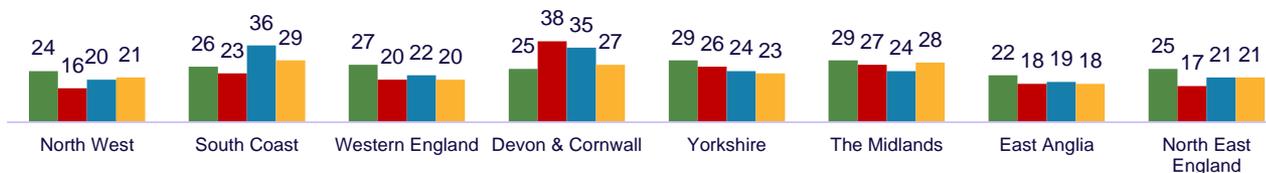
The low interest outside the south of England, particularly among Germans and the Dutch is in part due to the perceived ease of getting to these locations as well as lack of knowledge about what there is to see and do

### Interest in visiting England's regions (% Definitely)

Example places cited:



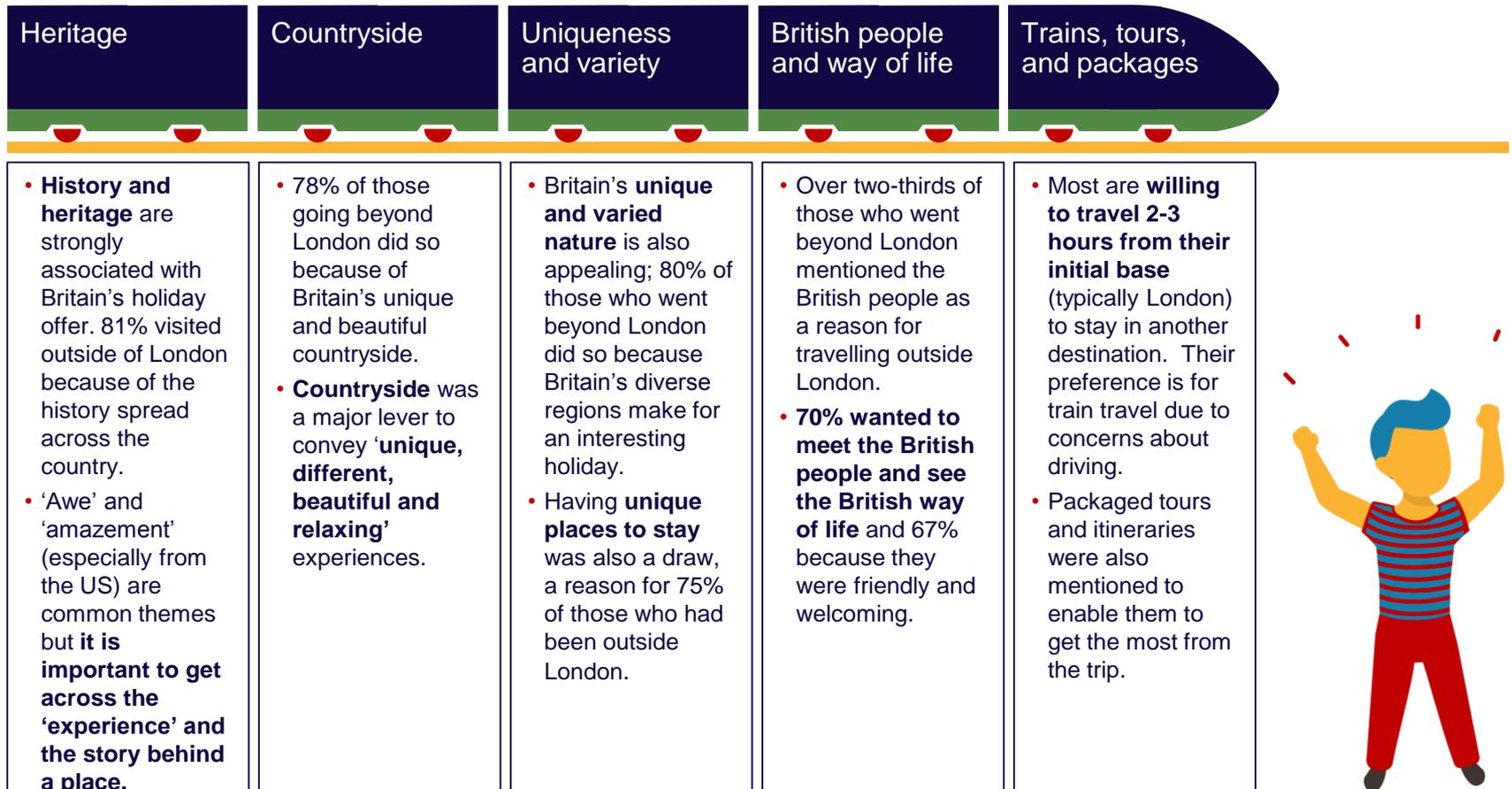
Agreement: Has beautiful countryside



Agreement: Is easy to get to



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



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 Walking Trails product offers.**
- 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 areas attractions go a long way to speaking for themselves.
  - Avoid colloquialisms which may confuse overseas audiences.

# How to differentiate and optimise the Walking Trails Opportunity

- Gateways & Connectivity
- Activities & Themes
- Planning & Booking
- Building Partnerships



# How to differentiate and optimise the Walking Trails Opportunity **Gateways & Connectivity**

## Encouraging use of regional gateways is key to get visitors to go beyond London and explore all our Walking Trails

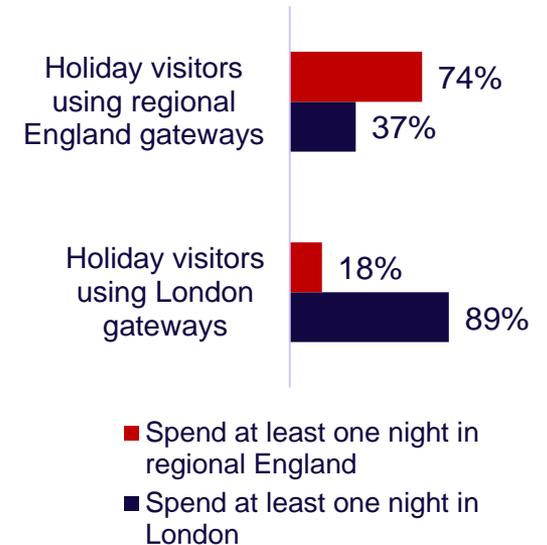
- The majority of visitors to England use London or the South East as their gateway – and tend to stay near that gateway region. Rail and Seaports are a popular way of getting to the UK from the European destinations. The launch of the direct Eurostar services from the Netherlands may increase this further.



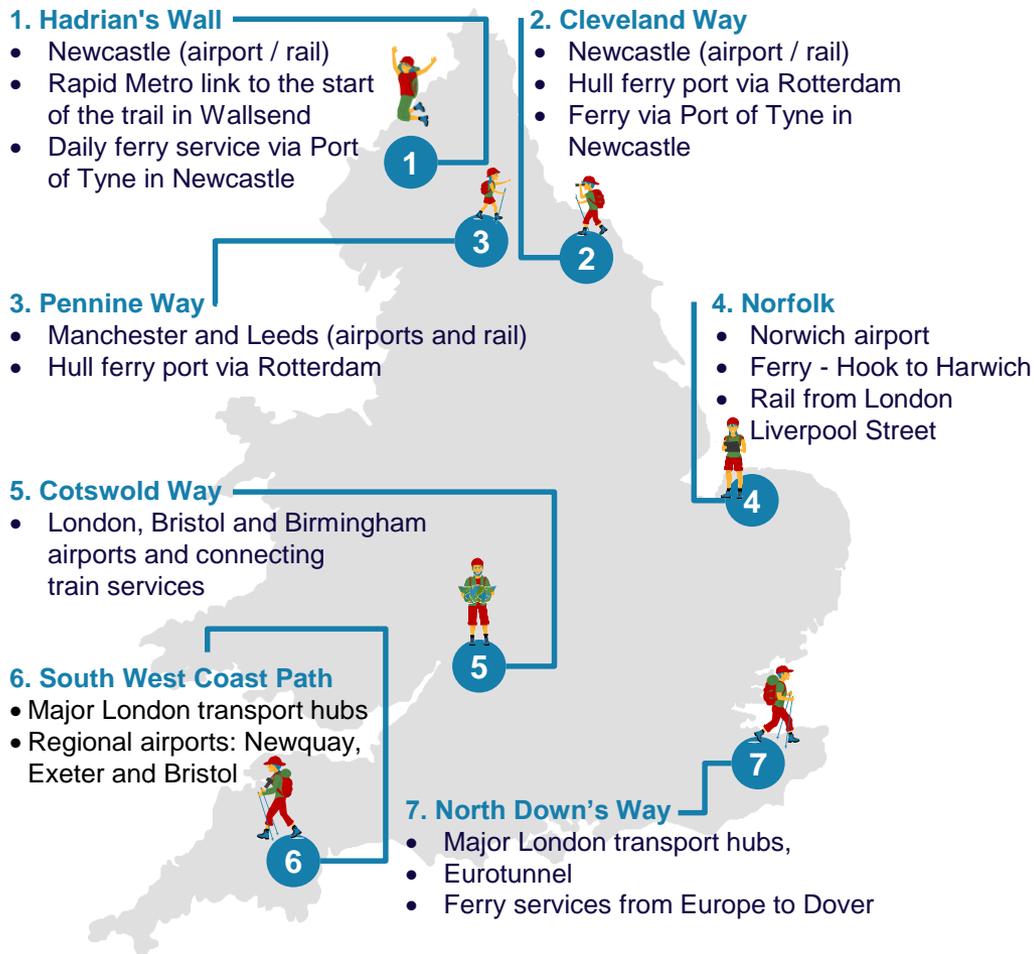
### Gateway mode (UK Holiday Visitors)



### Where do they stay?



# Collectively Walking Trails can be accessed through all major gateways. There are opportunities to promote certain Trails to each target market



### Challenges

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

### Opportunities

- North Downs is most accessible to inbound London travellers.
- MPDD (Marketing Peak District and Derbyshire) gateway partner for Manchester and Birmingham.

	Main Gateways/Modes	Opportunities
US	<ul style="list-style-type: none"> <li>Heathrow</li> <li>Manchester</li> </ul>	<ul style="list-style-type: none"> <li>Pennine Way</li> </ul>
France	<ul style="list-style-type: none"> <li>Eurostar</li> <li>Bristol</li> <li>Gatwick</li> </ul>	<ul style="list-style-type: none"> <li>Cotswold Way;</li> <li>South West Coast Path</li> </ul>
Germany	<ul style="list-style-type: none"> <li>Birmingham</li> <li>Manchester</li> <li>Stansted</li> <li>Seaports</li> </ul>	<ul style="list-style-type: none"> <li>Cotswold Way;</li> <li>Pennine Way</li> </ul>
Netherlands	<ul style="list-style-type: none"> <li>Seaports</li> <li>Newcastle</li> </ul>	<ul style="list-style-type: none"> <li>Norfolk;</li> <li>Cleveland Way;</li> <li>Hadrian's Wall</li> </ul>

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

# While there are a number of gateways for each Walking Trail, direct connectivity to the Walking Trail locations is a challenge

- Every trail is accessible but time taken and / or clarity of how to get to the start points needs to be more accessible and easy to understand for international travellers. Below are examples from two of the trails.

## Getting to Cleveland Way Trail

- Getting visitors to the start of the walking trail in Hemsley is particularly challenging – the last mile takes in excess of 3hrs for those using public transport.
- Visitors have to plan their journey through an external ‘Traveline’ website which is not geared to international travellers.

Newcastle Airport Metro [APN] → Hemsley North Yorkshire

Depart/Arrive	Changes	Legs	Duration
10:52 → 14:57	5	[Icons]	4:05
12:04 → 15:12	2	[Icons]	3:08
12:52 → 17:17	4	[Icons]	4:25

Your Journey: Leeds Bradford Airport (W Yorks) West Yorkshire → Hemsley North Yorkshire

Depart/Arrive	Changes	Legs	Duration
11:10 → 14:57	4	[Icons]	3:47
12:30 → 15:12	2	[Icons]	2:42
13:10 → 17:17	3	[Icons]	4:07

Hull Ferry Terminal → Hemsley North Yorkshire

Depart/Arrive	Changes	Legs	Duration
11:09 → 15:12	2	[Icons]	4:03
12:09 → 17:17	3	[Icons]	5:08
13:49 → 18:17	3	[Icons]	4:28

## Getting to Cotswold’s Way Trail

- In comparison, you can get to Bath from London Paddington or Bristol Airport in less than 1.5hrs.
- But information is sparse on the website (see below) and visitors are directed to other sites which do not clearly give the last mile timings.



### Getting There

Exploring the Cotswold Way by public transport is easy.

The [Escape to the Cotswolds website](#) provides all the information you need to plan your visit to the Cotswolds by bus and train.

You can also find public transport information and help with journey planning on the [Traveline website](#) or by calling [0871 200 22 33](tel:08712002233).

## Providing targeted information by market and simplifying the last mile for inbound travellers is key

### Avoiding itineraries where driving / hiring cars is required, especially among visitors from the US and France.

- 48% are nervous about driving in the UK.
- The US (54%) followed by France (49%) are most nervous about driving in the UK.
- Those in Germany are less nervous (40%). No data available for Netherlands.
- This is not a huge problem for the majority of the Walking Trails where public transport options are available.

### Providing clarity and simplifying the last mile for inbound travellers is the key for Walking Trails

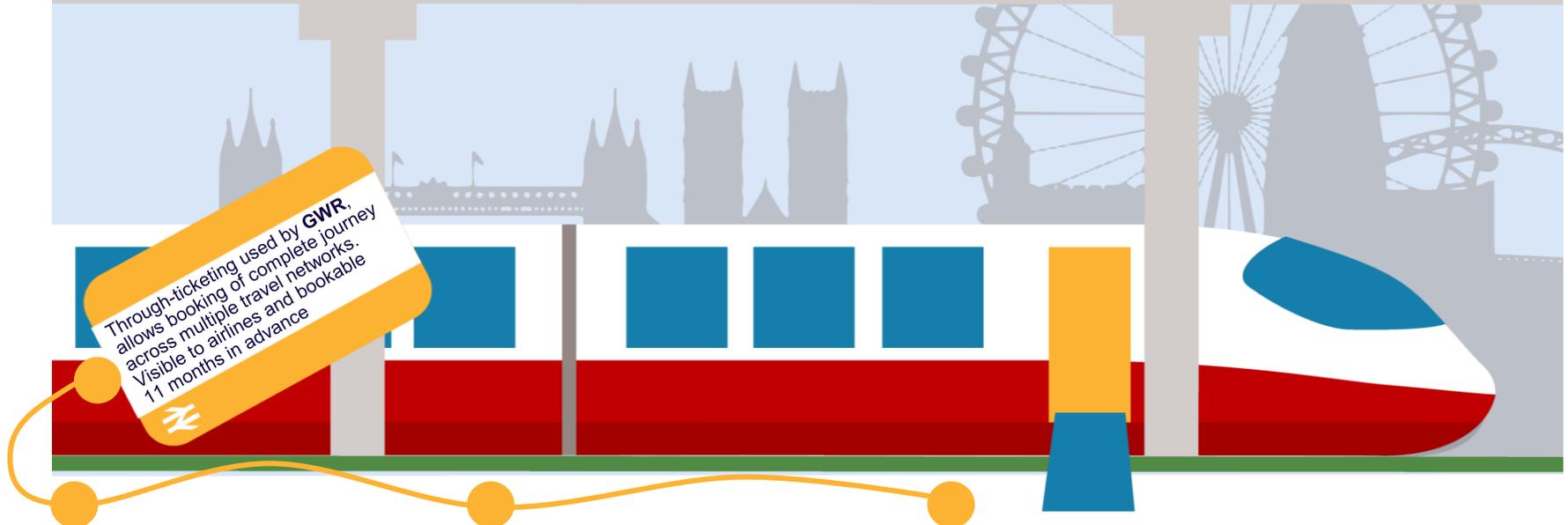
- For destinations that need to be reached using public transport (rail, bus or coaches), the lack of detailed information is a barrier to international travellers:
  - They wouldn't know how to get outside of London
  - Over-estimate journey times between destinations
  - They don't speak the language
  - They don't have confidence
- Particularly among visitors from France and 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 than those from France.

### Potential Actions to Consider:

1. Re-assess the start and finish points for each Walking Trail by market i.e. Newcastle higher entry point from those travelling from the Netherlands, is there a better starting point for these visitors on the Pennine Way?
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 and 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.



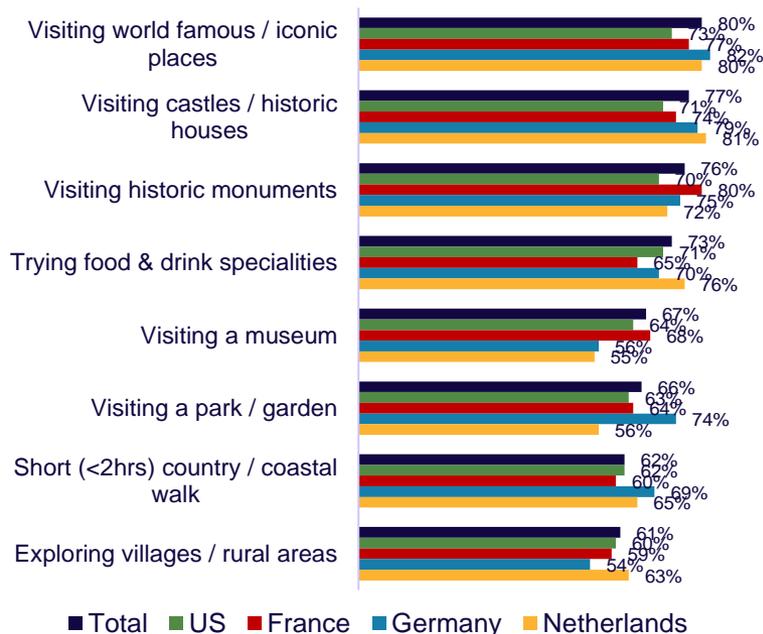
# How to differentiate and optimise the Walking Trails Opportunity Themes & Activities



## While short walks (<2hrs) have relatively strong appeal across the target markets, other activities beyond walking have greater pull

- 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.
- Long walks are appealing but to a niche audience and therefore you may want to focus marketing communications on shorter walks to appeal to a greater audience.

### Top 8 activities considered in England



### Consideration of walking activities in England



\*Rank position among a list of 40 activities

# Other activities considered illustrate a strong opportunity to package walking tours with other products

## Main activity and possible cross-over activities:



Cross-over with other activities

- Seeing world famous or iconic places
- Visiting a castle/palace/historic house
- Visiting a historic monument
- Trying local food & drink specialities
- Visiting a park/garden

- Short (<2hrs) country or coastal walk
- Seeing world famous or iconic places
- Visiting a castle/palace/historic house
- Visiting a historic monument
- Trying local food & drink specialities

Demographic differences

France – skewed to 55+ or those with a young family  
 Netherlands – skewed to 55+ with no kids

**US** – skewed to a younger age group (18-34)  
 Tend to have older children  
 AB skew in Netherlands and Germany

- Almost all long walkers are also interested in short walks, so communicating both options should maximise appeal.
- Activities of most interest are consistent across those who would consider short and long walks.
- Promotion of more than just the walk will increase the appeal and create additional hooks for potential visitors.
  - Linking to points of interest (historic / iconic) along the way has great appeal across all markets.
  - Combing local food & drink specialities with the walk is also appealing, particularly among the US and least among the French.

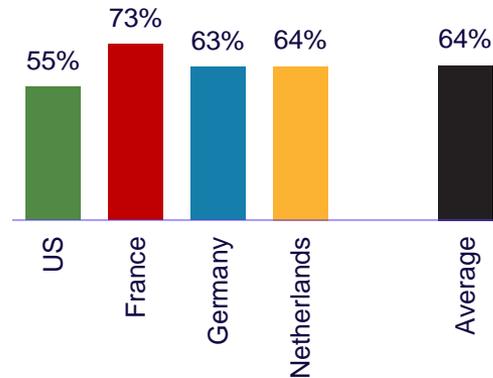
## Combining Walking Tours with *Hidden Histories*

### 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

The Future Travel Journey Foresight Factory  
Online Research | Base: 1000-5000 online respondents per country aged 16-64 2015 February



### Considerations:

- There is cross-market appeal for experiencing History and as a concept it fits well with future traveller trends ‘The Pursuit of Real’.
- Other DEF projects are also considering making history more accessible and engaging through the use of technology.
- However, technology may be a barrier for some of the older clientele who tend to partake in these activities (especially France and Netherlands).



### England’s Heritage Cities Case Study

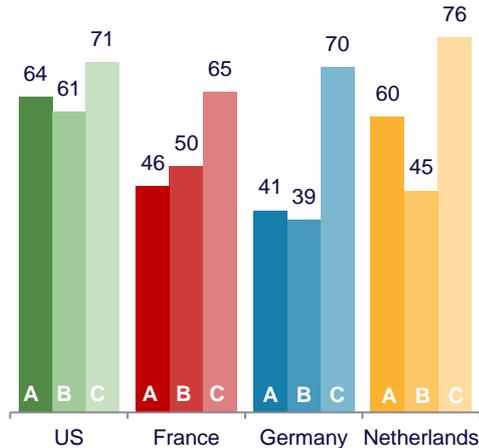
Created an app which allows visitors to explore attractions in 12 cities and unlock a collection of engaging stories using AR.

By bringing VR to the actual historical locations, TimeLooper aims to create a level of immersion and empathy that could not be achieved through VR experiences for domestic use.

# Combining Walking Tours with *Food and drink offerings*

## Food & drink related activities likely to try when visiting Britain (%):

A: Gourmet meal  
 B: Food & drink tour or attraction  
 C: Trying local food & drink specialities

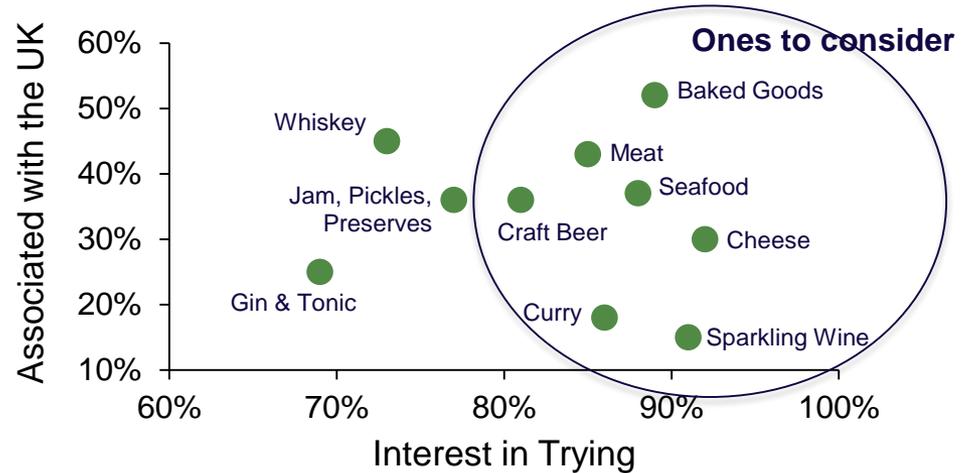


Previously tried new food on holiday:



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 and drink is rarely a main reason to visit Britain (5% of 2015 visitors) but can play a significant supporting role.
- There is particularly high interest for more local food and drink specialities – and the **low association of some of these could be expressed as a unique experience.**
  - Cotswold Way combined with Three Choirs Vineyard in Gloucestershire.
  - Pennine Way combined with Wensleydale Cheese tour in Hawes.
  - Special craft beers for each walking trail.
  - Cleveland Way combined with Seafood / Fish & Chips.



- While trying a gourmet meal is high among the Dutch, this is at a market level and not high in the consideration set of those who are considering short / long walks.

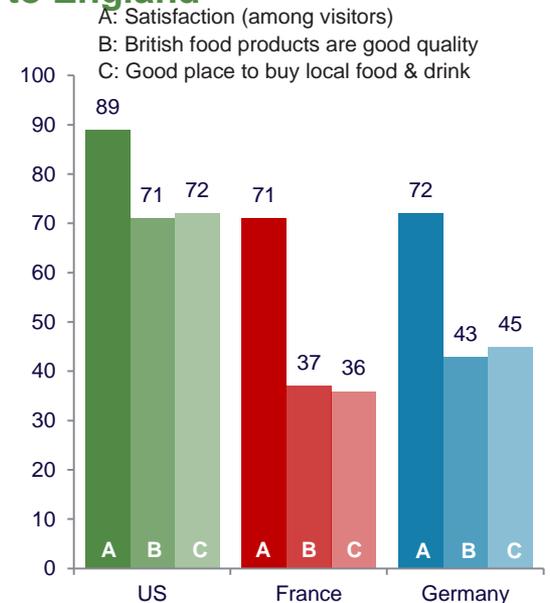
## Combining Walking Tours with *Food and drink offerings*

- There is interest in combining Walking Trail type activities with food & drink offerings but there **might be some convincing to do around the quality of local produce.**
  - 46%** of all inbound visits include a visit to a pub - it is already an established behaviour that can be built on.
  - There is considerable overlap across the various food activities and with other relaxed country exploration – for example, of those who are interested in trying local specialities, 75% are interested in exploring villages / rural areas.
  - Whilst satisfaction levels among visitors are quite high, there is potential to improve perceptions of England 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	75%	77%	70%
Interest in short walks (<2hrs)	71%	75%	
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 England



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



# Concept Test conducted in Germany and Netherlands suggests some challenges but also opportunities:

## The concept tested:

*When considering a walking holiday, I love the combination of challenge and comfort – being in the outdoors, immersed in fresh air and beautiful scenery, but relaxing in comfort at the end of the day.*

*England's Great Walking Trails are beautifully curated walking Trails through the historic and charming English countryside that get you off the beaten track, but never take you far from a classic English pub!*

*Each walk is designed to give you easy access to amazing views and fresh air by day, but cosy firesides, great atmospheres and traditional food & drink by night. You'll rub shoulders with colourful local characters, enjoy the beer and walk in the footsteps of England's rich history. With itineraries from 3 to 14 days, and a range of accommodation from luxury to quirky, all easily bookable online or at travel agents, there's something for everyone.*

**'England's Great Walking Trails – where walking is only half the experience'**

### Strengths\*

Germany	Netherlands
Nature	
Freedom	
Relaxation	
Peace	
Allows me to visit places that I couldn't previously	
Allows me to see the real country	
	Takes the stress out of organising a holiday
	Saves me time organising a holiday
Concept 'likes'	
Experience the landscape	
Encounter the locals	
Discover England	

### Key Associations

- Hiking
- Nature
- Holiday
- Walking

### Challenges\*

Germany	Netherlands
Price perceptions	
	Uniqueness abroad
Uniqueness in England	
Concept 'dislikes'	
Too tiring, too long walking	

### Implications

- Clarification of hike vs walk in the local languages may be needed.
- Need to ensure the product conveys uniqueness and has a strong identity, potentially through:
  - Allows me to visit places that I couldn't previously
  - See the real country
- Concept testing in US particularly will be beneficial.



How to differentiate and  
optimise the Walking Trails  
Opportunity

**Planning & Booking**

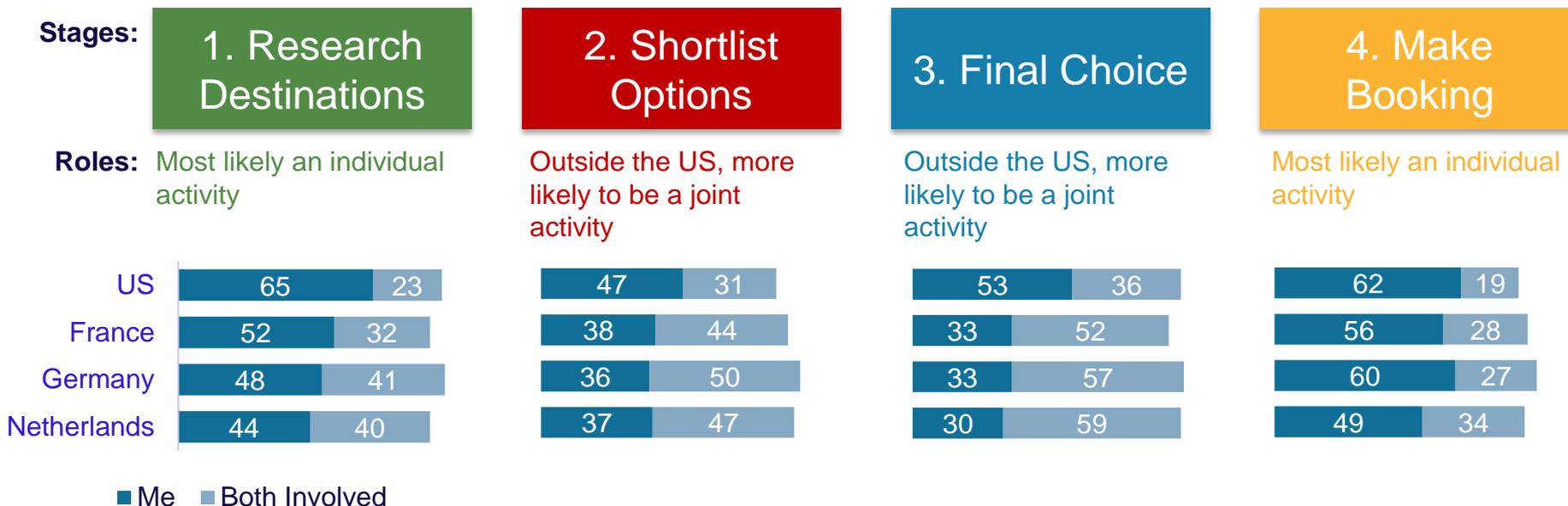
## The planning stages: There are four stages to the general holiday planning process; responsibilities differ across these stages by gender and market

- Finalising the holiday (making the 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, 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.

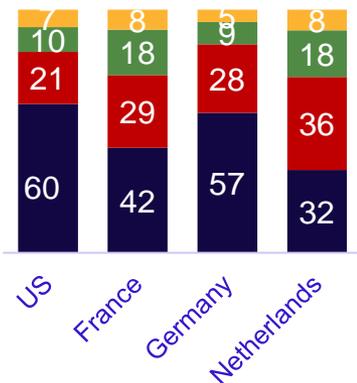
### Key stages and roles in the holiday planning process (any destination):



**The planning process:** The length of the booking process varies greatly by market and by age; the lead time to booking is longest in Germany and the US and shortest in the Netherlands. Timing of marketing campaigns will need to reflect this

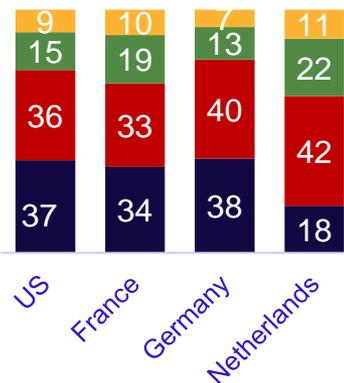
**Started thinking about their trip (%)**

- Those in Germany and the US started to think about their trip at least 6 months in advance.
- While in the Netherlands and France, around a third of visitors only started to think about it 3-6 months in advance.



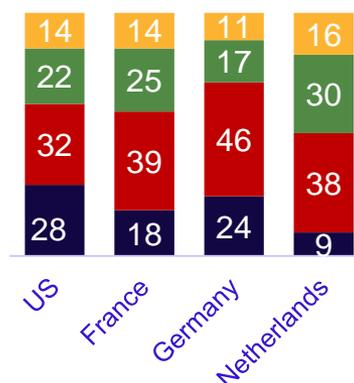
**Decided on the destination (%)**

- Typically between 3 and 6 months prior to the visit.
- Although German and US visitors to England may well have decided more than 6 months in advance.



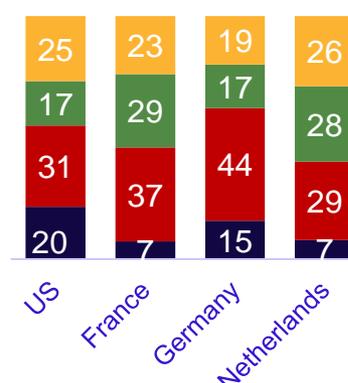
**Looked at options / prices (%)**

- Typically between 3 and 6 months.
- Those in the Netherlands are only start to review options / prices in the last 2 months. In fact, 26% of those travelling from the Netherlands do not do any price comparisons.



**Booked the trip (%)**

- Typically booked less than 2 months in advance of visit.
- Those in Germany and the US are most likely to have booked more than 3 months in advance.



**Age:** 65+ year olds 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

- While ‘word of mouth’ is the biggest influence across all age groups on destination of choice, there are some key differences to be noted for your target markets.
- US are slightly more reliant on traveller review websites, while word of mouth is and guidebooks are more influential among the French.

### 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

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

### Future Travel Trend – Conversational Commerce

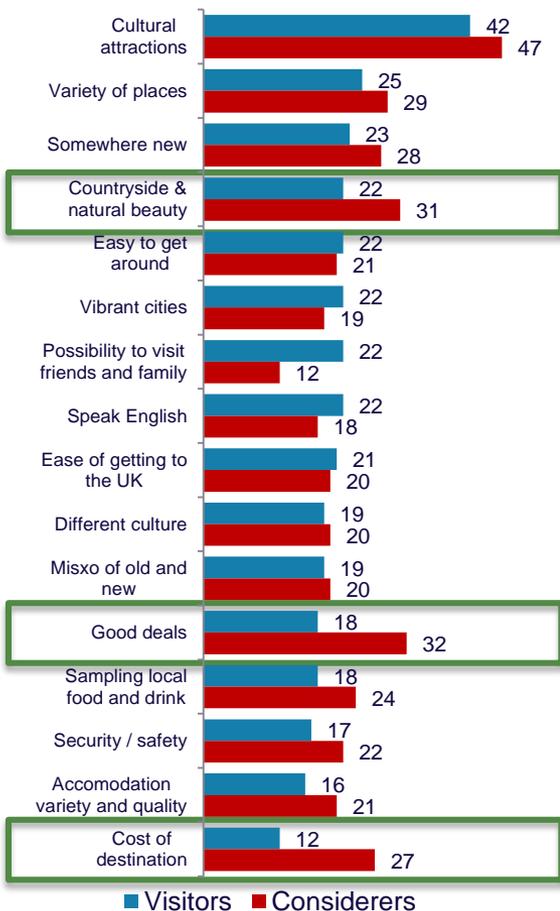
Making enquires about or booking tourism products will be easier than ever for future travellers, as they won't even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.

*“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, aside from France.
- There are potential barriers which could be used as opportunities in your messaging

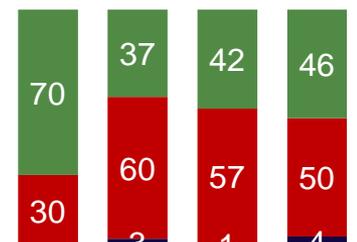
	Top 3 Motivators	Potential Barriers*
<b>US</b>	<ul style="list-style-type: none"> <li>• Cultural attractions (38%)</li> <li>• Countryside / natural beauty (28%)</li> <li>• Variety of places / Easy to get around (27%)</li> </ul>	<ul style="list-style-type: none"> <li>• Ease of getting to the UK (4ppt lower)</li> </ul>
<b>France</b>	<ul style="list-style-type: none"> <li>• Cultural attractions (46%)</li> <li>• Ease of getting to the UK (44%)</li> <li>• Variety of places / good deal (33%)</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of destination (12ppt lower)</li> <li>• Security / Safety (12ppt lower)</li> </ul>
<b>Germany</b>	<ul style="list-style-type: none"> <li>• Cultural attractions (49%)</li> <li>• Variety of places (41%)</li> <li>• Countryside / natural beauty (38%)</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of destination (9ppt lower)</li> <li>• Security / Safety (8ppt lower)</li> </ul>
<b>Netherlands</b>	<ul style="list-style-type: none"> <li>• Cultural attractions (44%)</li> <li>• Countryside / natural beauty (36%)</li> <li>• Vibrant cities (31%)</li> </ul>	<ul style="list-style-type: none"> <li>• Security / Safety (13ppt lower than avg)</li> <li>• Ease of getting around (10ppt lower)</li> </ul>

\* Biggest gaps to all country average for motivations

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

### Travel & Accommodation Booking

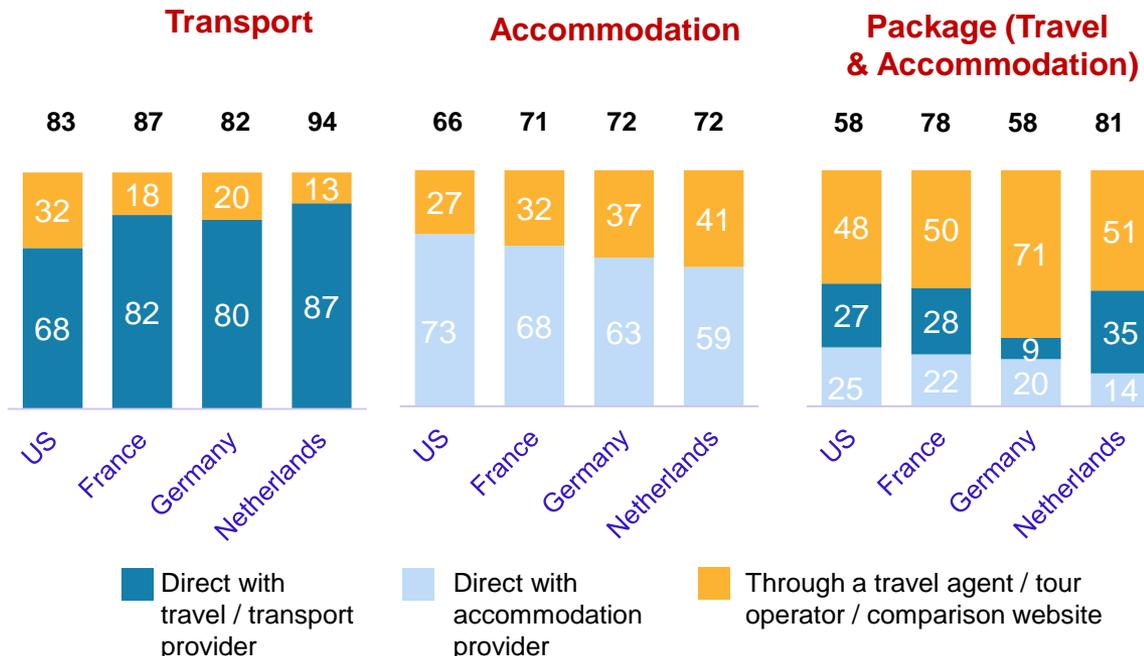
- 70% of those in the US booked their holiday to Britain as part of a package.
- The European markets are more likely to book travel and accommodation separately.



- Booked together
- Booked separately
- Don't know

### 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 and France. Larger screen devices (laptops or desktops) are mostly used to make the booking.



# 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:**

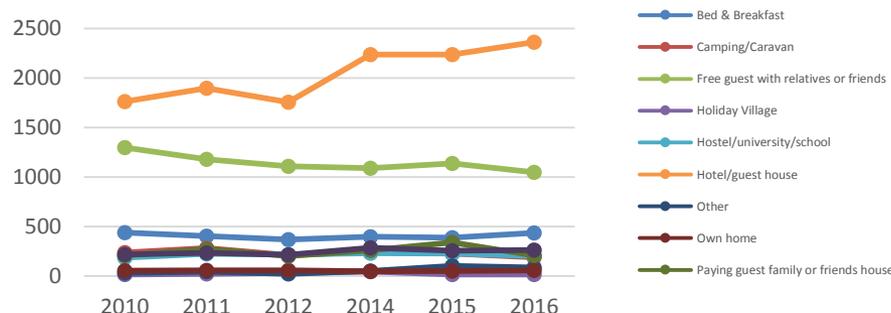
- Accommodation is not a motivator for visiting England; Only 16% of visitors see the variety & quality accommodation as a motivator.
- In the European markets being targeted, over 50% book travel and accommodation separately.

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

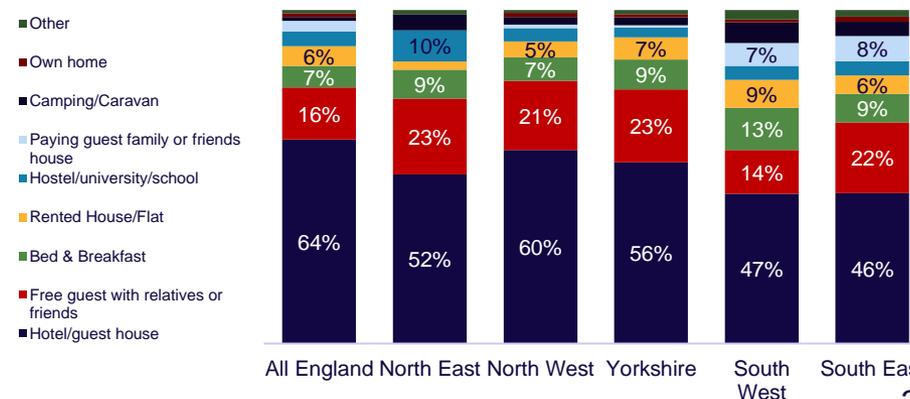
- Availability & capacity – hotels don't provide fixed rates and allocations in advance
- Poor quality and excessive cost
- Lack of flexible/twin rooms
- Self-catering difficult to book
- Poor service standards and welcome

- 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)



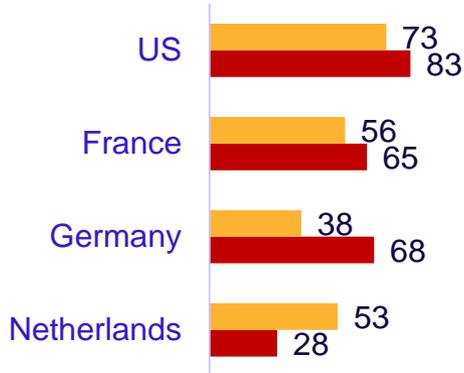
### Accommodation Type Stayed in – All England and Regions (2016)



**Bookable products:** Those in the Netherlands are more likely to be spontaneous both with travel arrangements and activities – this is in stark contrast to the US, where approximately half book prior to their trip

**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 and France like to have some things planned – they also welcome a certain amount of spontaneity in the itinerary



- I like to be spontaneous on holiday and decide some of my itinerary at the last minute
- I like to plan my holiday carefully before I leave

**Pre-bookable transport / activities**

	US	France	Germany	Netherlands
Transport within London (e.g. underground)	50 / 33	12 / 65	22 / 47	14 / 42
Train Travel (within the UK)	51 / 22	14 / 22	18 / 27	12 / 26
Airport transfer	63 / 13	19 / 19	30 / 20	14 / 20
Coach travel / long distance bus in the UK	49 / 12	8 / 44	13 / 15	10 / 20
Car hire	52 / 20	13 / 5	23 / 7	10 / 6
Flights in the UK	53 / 8	10 / 2	12 / 1	10 / 3
Sightseeing tours in London	56 / 20	13 / 23	17 / 22	20 / 20
Sightseeing tours outside of London	56 / 18	10 / 15	16 / 25	18 / 18
Tickets / passes to other tourist attractions	57 / 30	15 / 49	24 / 37	20 / 51

■ Pre Booked prior to trip ■ Booked during trip



VisitEngland

XV

Insight

How to differentiate and  
optimise the Walking Trails  
Opportunity

**Building partnerships**

# Building effective partnerships with Travel Trade by addressing some of the perceived weaknesses of the regional England offer

Strengths

- 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).
- Walking and soft adventure (leisurely, short walks) appeals.
- Personalisation is a growing trend.

Weaknesses

- London dominates as destination.
- Lack of awareness beyond London, esp. Midlands & North.
- Great diversity of images – but that makes somewhat unfocused.
- Accommodation is seen as a ‘fundamental’ barrier (see following).
  - 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
- Transport concerns (see following).
  - Lack of regional flights
  - Seasonal lack of ferries
  - Nervousness of left-hand-drive,
  - Rail issues (price, gaps, trains etc.)
- 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.

Opportunities

- Tap in to traveller wants: ‘Experiential trips’ & ‘Off the beaten track’.
- Brexit – short term opportunity (favourable exchange rate).
- Millennials (NL & US) – time poor and happy to be ‘packaged’.
- Culinary experiences – offering distinctly English food.
- US Interest in ancestry could be an opportunity if walking trails can be linked to historic routes.
- Offer distinctive accommodation (castles – US, country cottages – FR).
  - 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)
- More developing of the existing offer rather than radical new (see following).
- Clear transport information and support.
- Raise awareness through joint marketing.

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 Walking Trails - not for others.
- Good transport is required with regional access.
- History & Heritage are key interests – whilst Walking Trails can include heritage destinations it is not at the heart of the proposition and over-emphasis could dilute the Walking Trails message.

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

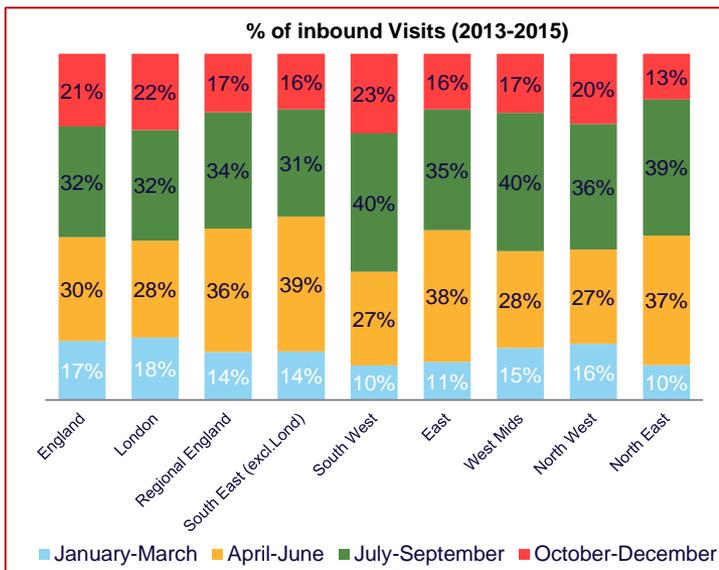
- Overall visitor volumes naturally skew towards the spring / summer season
- The winter months are unlikely to attract a high visitor volume given the range of outdoor activities and the perceived barrier that the weather is to travelling beyond London

Season of visit by country of origin to England (all England) IPS 2015	US	France	Germany	Netherlands
January - March	8%	19%	7%	6%
April - June	34%	38%	36%	37%
July - September	43%	26%	43%	39%
October - December	16%	16%	14%	18%

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



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

## England Occupancy 2017



Source: VisitEngland England Occupancy Survey 2017

## Partnerships with other DEF projects should be considered to attract visitors to Walking Trail offerings, particularly among US and French visitors

### US

#### Consider partnerships with Marketing Manchester (Growing Manchester)

- While longer itineraries appear possible for US visitors (57% stay 8 nights or longer), only 28% are spending time in the rest of England. Heathrow and Manchester are the main gateways.

### France

#### Consider partnerships with Heritage Cities (The Collection)

- While we do not know the appetite for longer itineraries for visitors from France without testing, current trends show that they have the shortest stays in England and therefore shorter itineraries are likely to be more appealing.
- Only 30% spend time outside of London and this is predominately in the South East or South West. Given the proximity of walking trails to Bath and Canterbury, a partnership / joint product with Heritage Cities should be considered.

### Germany

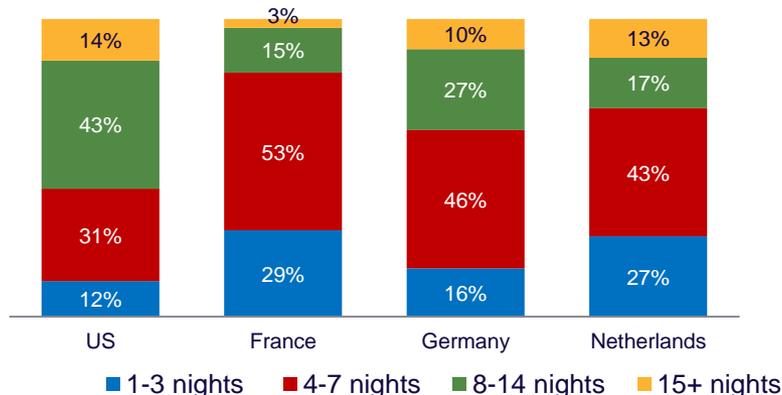
### Netherlands

- Visitors from Germany and the Netherlands are most likely to venture beyond London (43% and 43% visits respectively outside of London).
- Typically visitors stay around 6-7 nights in the rest of England, so itineraries less than 7 days may resonate more. However, there is evidence in Germany that they may be less interested in a fully planned itinerary (at 40%) compared to visitors from the US and France (~50%).

Average number of nights stayed in England (2015)



Duration of stay in England (2015)





VisitEngland

XV

Insight

Summary –  
key take-outs



# How can Walking Trails differentiate and optimise it's offering?

## 1. Promoting Regional England, Gateways & Connectivity

Awareness of regional England is the biggest challenge to overcome – through partnerships, there is a need to grow awareness and help inbound visitors imagine the experience they will have outside London.

### 1) Help customers imagine regional England.

- Compare England offer favourably with similar, well-known 'regional' offers in other countries e.g. Cotswolds/ Tuscany, York/ Seville, Cornish coast/ Spanish Costas).
- 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.

### 2) Encouraging the use of regional gateways is key to get visitors to go beyond London.

- 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 Walking Trails to each target market (i.e. Manchester is a key gateway for US visitors – so Pennine Way could be promoted).

### 3) Assessing which are the best places to start the walks and making it clearer how international travellers get there.

- Nearly every trail 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. Aiding discoverability of this information and making it easy to understand for international travellers is key.
- Identifying the best start / entry points for individual locations coupled with experiences around that area could help drive inbound travellers – both for short and long stay breaks.
- A partnership with Heritage Cities should also be considered given the close proximity to some of the Trails.

# How can Walking Trails differentiate and optimise it's offering?

## 2. Themes & Activities

- While short walks (<2hrs) have relatively strong appeal across the target markets, other activities beyond walking have greater pull. Long walks are appealing but to a niche audience and therefore you may want to focus marketing communications on shorter walks to maximise appeal.
- There is evidence to suggest that promotion of more than just the walk will increase the appeal and create additional hooks for potential visitors. In particular:
  - **Hidden Histories** - Linking to points of interest (historic / iconic) along the way has great appeal across all markets, with the opportunity to meeting local people.
    - Explore potential benefits of collaboration or best practice sharing with other DEF projects. Other DEF projects are also considering making history more accessible and engaging through the use of technology (Heritage Cities – The Collection).
    - However, technology may be a barrier for some of the older clientele who tend to partake in these activities (especially France and Netherlands).
  - **Food Experiences** - Combining local food & drink specialities with the walk is also appealing, particularly among the US and least among the French.
    - Build in food & drink experiences into itineraries to create unique experiences .e. Cotswolds Way combined with Three Choirs Vineyard in Gloucestershire.
    - Focus on local food & drink specialities followed by food and drink attractions as there is a higher cross-over with walking activities, exploration of local rural areas.

We understand that further research (concept testing) is underway to optimize the final experience.

## How can Walking Trails optimise and differentiate it's offering?

### 3. Planning & Booking

- The length of the booking process varies greatly by market and by age; the lead time to booking is longest in Germany and the US 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.
  - While 'word of mouth' is the biggest influence across all age groups on destination of choice, there are some key differences to be noted for your target markets.
  - US are slightly more reliant on traveller review websites, while word of mouth is and guidebooks are more influential among the French.
- 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 i.e. cheaper outside London etc.
- 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.
  - Reducing the hassle of finding good quality accommodation for visitors and re-engaging with Travel Trade is key.
- Those in the Netherlands are more likely to be spontaneous both with travel arrangements and activities – this is in stark contrast to the US, where approximately half book prior to their trip.

# How can Walking Trails differentiate and optimise it's offering?

## 4. Building Partnerships

### Travel Trade

- 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 Walking Trails 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 Walking Trails but not for others.
  - Accommodation is seen as a 'fundamental' barrier.

### Other DEF projects

- Partnerships with other DEF projects should be considered to attract visitors to Walking Trail offerings, particularly among US and French visitors.
  - **US:** While longer itineraries appear possible for US visitors (57% stay 8 nights or longer), only 29% are spending time in the rest of England. Heathrow and Manchester are the main gateways. **Consider partnerships with Marketing Manchester (Growing Manchester).**
  - **France:** While we do not know the appetite for longer itineraries for visitors from France without testing, current trends show that they have the shortest stays in England and therefore shorter itineraries are likely to be more appealing. Only 31% spend time outside of London and this is predominately in the South East or South West. **Given the proximity of walking trails to Bath and Canterbury, a partnership / joint product with Heritage Cities should be considered.**



# Appendix

- Deep Dive – US opportunity

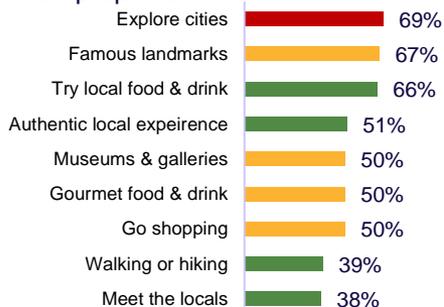


Deep-Dive – US Opportunity  
(from the most recent  
research conducted in June  
2017)

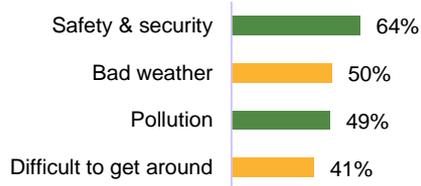
# General travel needs for US highlight the potential for Walking Trails

## Requirements of an International Vacation

Many of the most liked activities are potentially offered within Walking Trails proposition



Barriers to international travel provide both opportunity and challenges



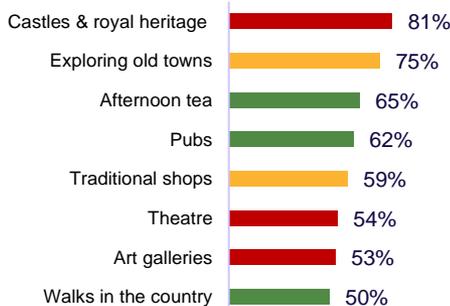
Data shown is for California

## Perceptions of Britain

Top 3 associations with Britain:

- Historical
- Cultural
- Beautiful

The activities associated with Britain align well with Walking Trails



Some related activities that appeal to US visitors that may provide further opportunities for Walking Trails:

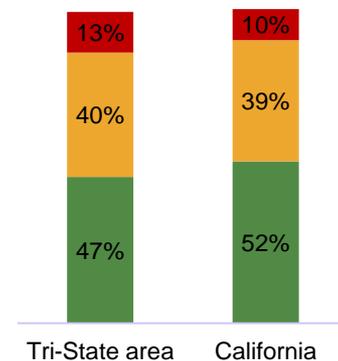
- Night in a castle
- Use a train pass to explore
- Sample local specialities at a farmers market

Data shown is for California

## Desire to visit is high

Britain is a popular destination with half of West/East Coast Americans wanting to visit.

25- 34 year olds are particularly keen to visit

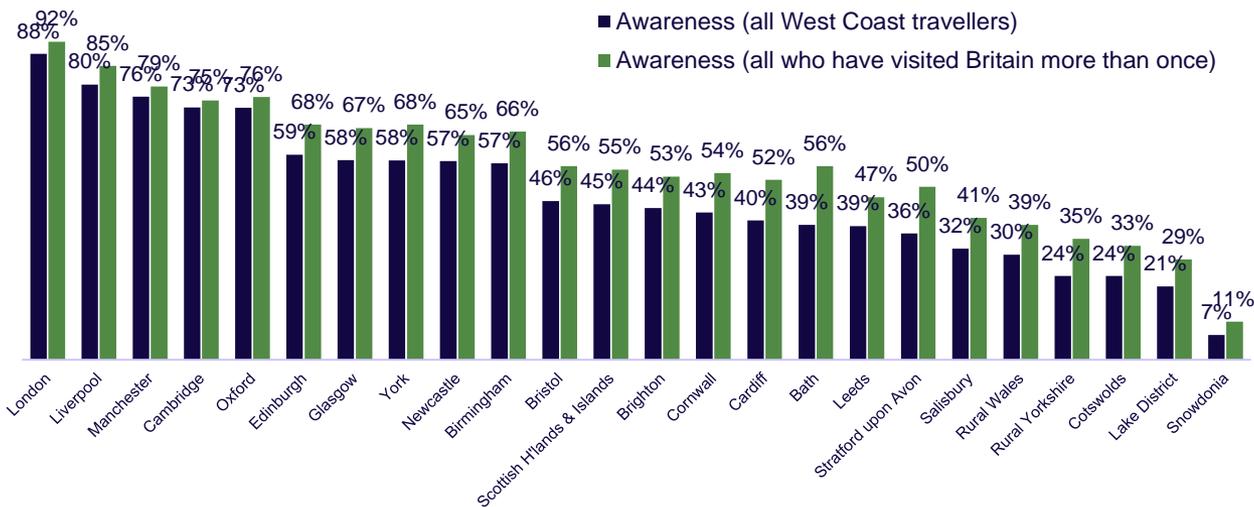


- Don't really want to visit (0-5)
- Quite interested in visiting (6-8)
- Really want to visit (9-10)

# Awareness is the biggest challenge to overcome to encourage visitors from US

## Awareness of rural destinations is low

- Awareness of destinations beyond major cities is low
- Rural destinations remain low even among those who have been to Britain.



## London Dominates

Only 28% of US visitors go beyond London.  
 Spontaneous associations are London-centric.  
 9 out of the top 10 visited attractions are in London (Stonehenge is the exception).

## England's Competition

**Scotland**  
 Awareness of Edinburgh, Glasgow and the Highlands are higher than England's rural destinations.  
 Loch Ness and Edinburgh Castle are popular attractions with US visitors.

**Wales**  
 Rural Wales has higher awareness than the rural regions of England.

### Considerations:

- Awareness is the biggest challenge for rural England and therefore Walking Trails.
- Scotland is a significant competitor, but there is opportunity to illustrate how a (Northern) Walking Trail could be integrated into a journey from London to Scotland.

## West Coast (California) provides the bigger opportunity for Walking Trails

### Gateway availability & growth potential

#### Gateways

While East Coast currently has higher capacity, the regional reach and growth potential is much higher from West Coast:

US overall	West Coast	East Coast
New routes	5	2
New routes	3	1
Capacity (weekly)	35,700	66,300

#### Multi-country trips

However the interest in multi-country trips increases the gateway options for travellers originally from US:

Only visit Britain:

California 36% Tri-state 52%

### Demographics

#### Californians ...:

- Are slightly wealthier
- Have more opportunities to travel (55% : 42%)
- Go on more vacations - 55% go on 2 or more vacations (48% East Coast)
- Have a greater desire to visit Britain (52% : 47%)
- Less likely to see Britain as old fashioned (30% : 36%)
- Are slightly more aware of rural destinations – in particular the Cotswolds and Lake District
- are more likely to walk on an international holiday (42% : 37%) and less likely to sunbathe or visit a spa
- Have a greater interest in
  - famous landmarks (42% : 38%)
  - Local food & drink (39% : 35%)
  - Live life like a local (12% : 9%)
- And are less concerned about the weather (13% : 23%)

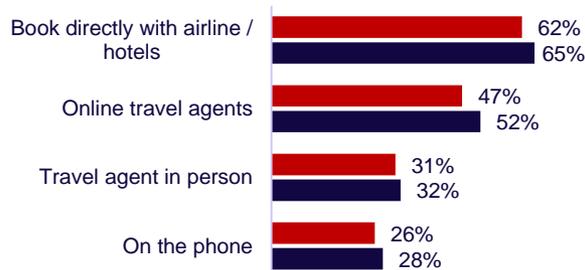
### Considerations

- The US is a good market to target and growth is enabled through the inbound direct routes.
- Opportunities also exist to be part of a 'European' holiday, providing contrast to destinations such as Paris, Rome and Barcelona.
- California provides a slightly stronger opportunity, with a more positive view of rural England, but raising awareness of both the locations and the complete package (walking trail plus local experiences) will be key.

# The US traveller booking process highlights focus areas for Walking Trails

## Traveller Behaviour

70% book hotel and travel together, but often use airline/hotel websites to do so.



- Given it's a long-haul journey and often includes multiple countries it is not surprising that the decision making process typically starts at least 3 months before the trip.
- Peer and expert reviews are an important part of the decision making process.
- US travellers tend to book more in advance of their trip, including all transport, tours and attractions.
- 18% also book restaurants in advance.

## Travel Trade Perceptions

Travel Trade barriers to be addressed include:

- **Awareness** – lack of knowledge beyond London.
- **Accommodation** – quality, availability and rate.
- **Entire journey planning** – to address public transport fears and the concern with driving on English roads.

US travel trade want to see:

- Better packaging
- Themed products
- New destinations (South Coast, Devon & Cornwall, Lake District and Yorkshire are mentioned)

## Considerations

- Support social media review activity where possible.
- Provide complete packages, accessible through a single source for both travellers and travel trade.
- Itineraries that tell stories/link to history and real but accessible natural beauty will resonate.
- Focus on seamless transport solutions.
- Ensure accommodation meets quality and availability expectations
- Ease and simplicity of booking and experiencing are key.



# Appendix

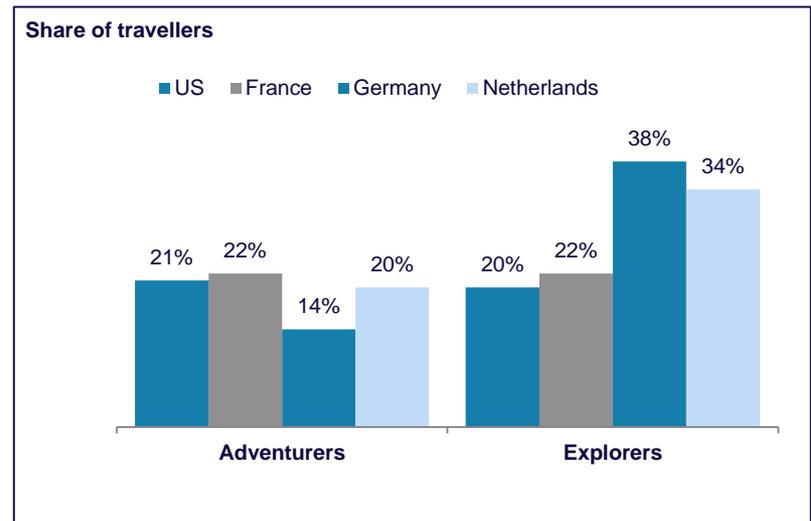
- Detailed segment profiles
- Data sources

## Targeting the most appropriate segments

- Walking Trails have targeted **Outdoor Enthusiasts**

	Outdoor Enthusiasts
<b>Profile</b>	35-55 years Families/Empty nesters ABC1
<b>Key Markets</b>	Germany, France, Spain
<b>Defining attitudes &amp; traits</b>	Active, nature lovers, cycling, curious, off-the-beaten-track
<b>Key interests</b>	Walking, hiking, cycling, time close to nature
<b>Travel preferences</b>	Beyond 'sunshine' countries, activity driven & value scenery, a sense of discovery
<b>Holiday activities</b>	Enjoying natural landscapes, getting close to nature, learning about culture/heritage/food, seeing the sights, meeting people
<b>Accommodation preferences</b>	Not mainstream hotel chains Independent hotels, B&B, camping Quirky, close to nature

- 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

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

# 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.

## Links to data sources

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- VisitBritain Segmentation, 2017
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