



VisitEngland™

Discover England Fund Research Summary Report

Growing Manchester as an International Gateway to the North
January 2018

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.



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Introduction



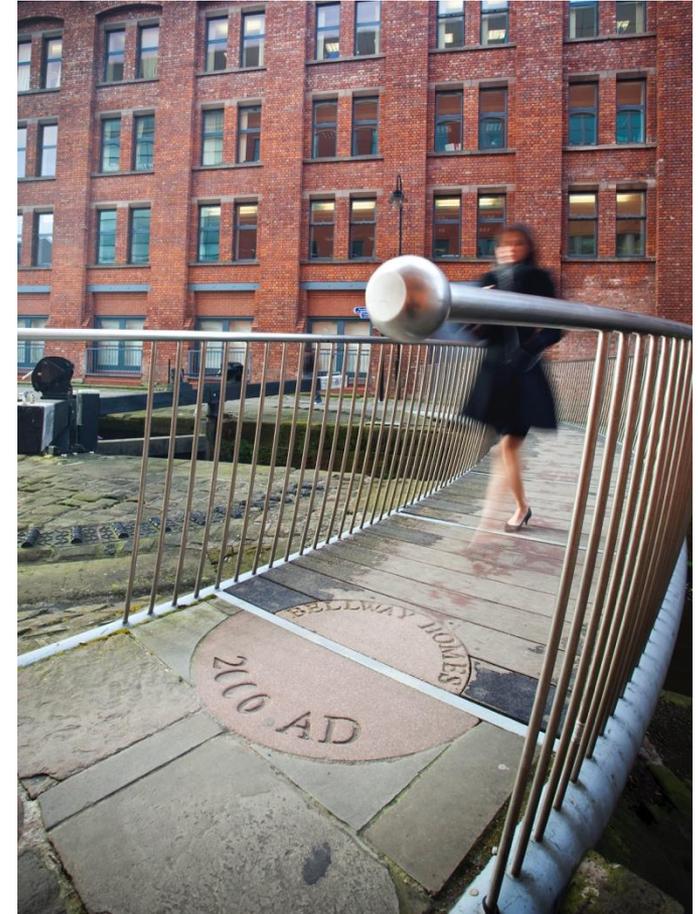
Project overview



Key Messages and areas of focus

Elevator Pitch

- Manchester represents one of the best opportunities to grow the volume and value of international tourism to regional England. To grasp this opportunity Manchester needs to raise its profile, package up its assets and make the most of its comprehensive connectivity to convince the travel trade and consumers that it is a great entry point to the UK.
- This project will showcase the city and make it easy to explore by bus, on foot and by boat. It will introduce visitors to the stunning landscapes and major sites on its doorstep by creating new, commissionable excursions product across the North of England that can be booked pre- and post-arrival.
- Working with destinations, with in-market and UK-based travel trade, with the tourism industry and VisitBritain, Marketing Manchester will lead a partnership that is growing in strength and purpose to realise a shared ambition: to maximise the potential of the North of England as an international destination and showcase its world-class product.





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Current Trends

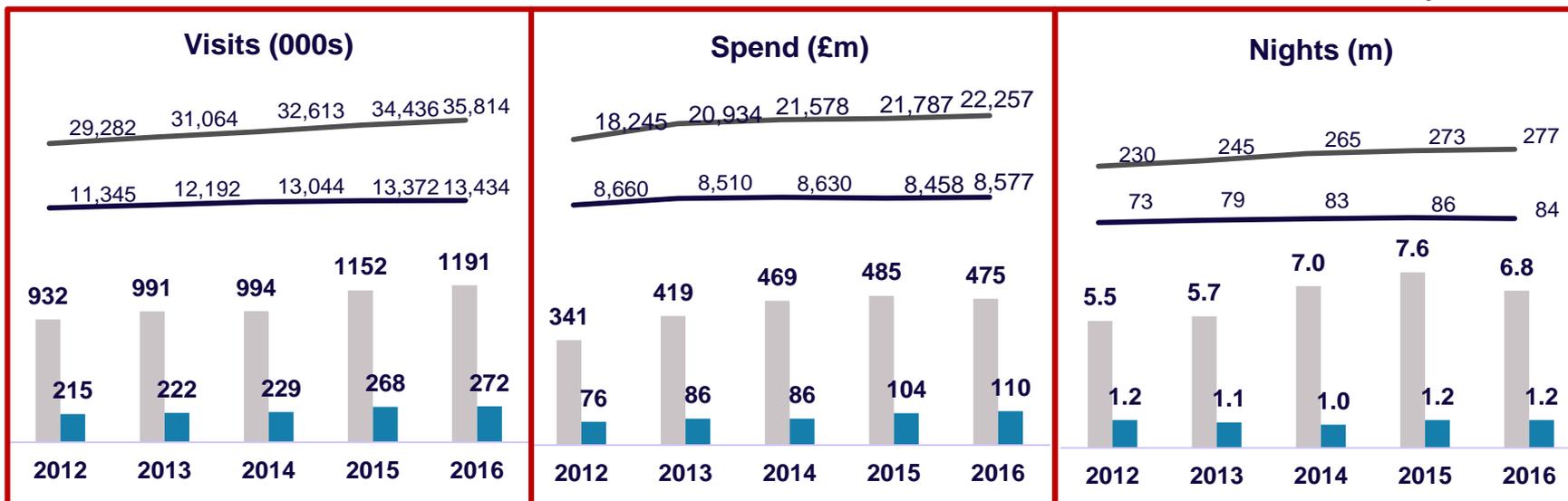
Overseas visits, spend and nights to Manchester: All markets

- Manchester attracts 1.1 million overseas visits annually, 256 thousand of which are for a holiday.
- Overall and holiday visit numbers, spend and nights-stayed increased significantly in 2015. Overall spend and nights-stayed declined in 2016, but holiday spend and nights stayed remains steady.

Visits, Spend and Nights to Manchester 3 year average for 2014-16*

Visits (000s)		Spend (£m)		Nights (000s)	
Manchester Total	1,112	Manchester Total	467	Manchester Total	7,166
Manchester Holiday	256	Manchester Holiday	100	Manchester Holiday	1,135

Visits, Spend and Nights Annual Trend

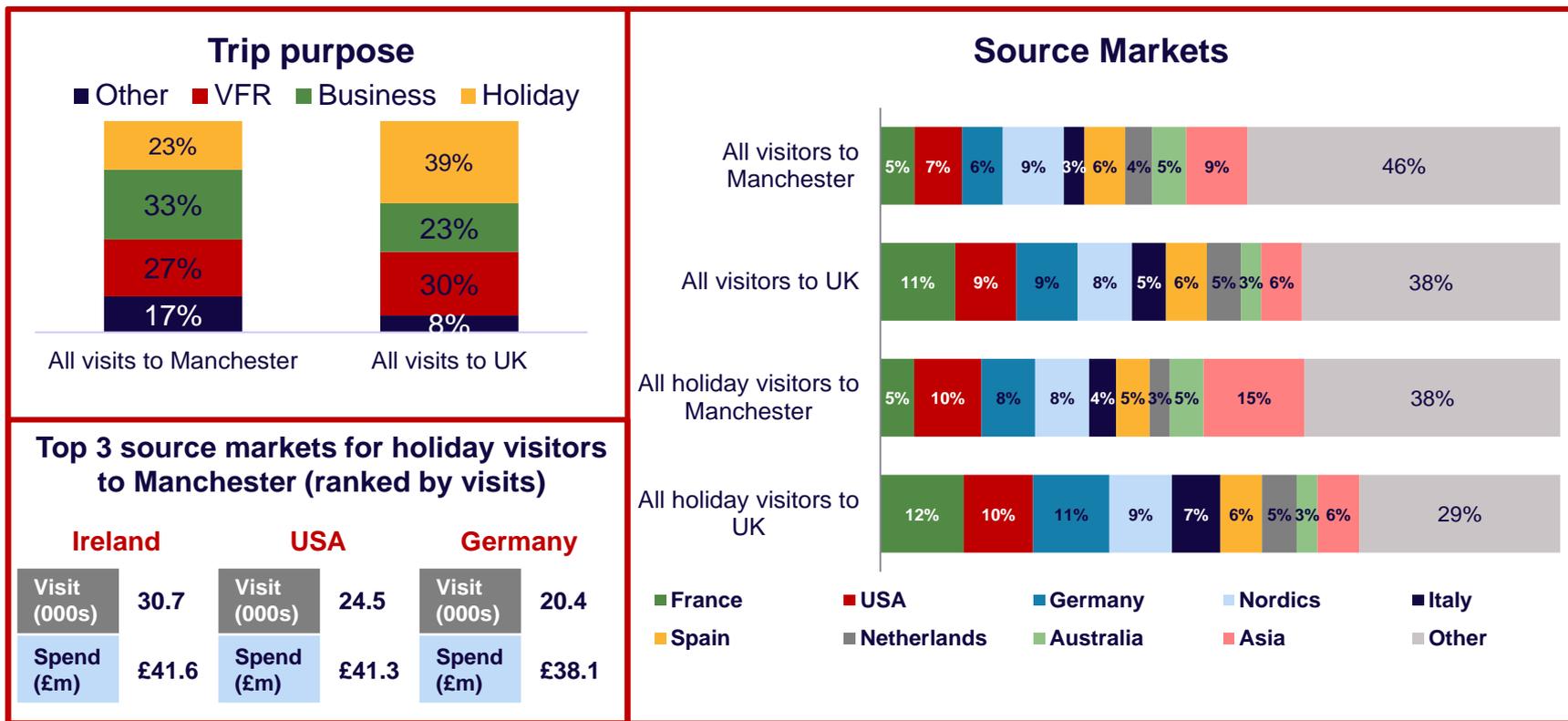


Note: This is based on all markets not just US

Source: IPS 2014-2016. Please note figures exclude visitors that did not stay in the UK overnight

Trip purpose and source markets: All visitors and holiday visitors

- Visitors to Manchester are more likely than visitors to the UK to be visiting for Business or ‘Other’ purposes. The highest number of holiday visitors come from Ireland followed by the US.
- Manchester attracts a lower percentage of visitors from Mainland Europe than the UK in general – but a similar proportion of holiday visitors from the US.

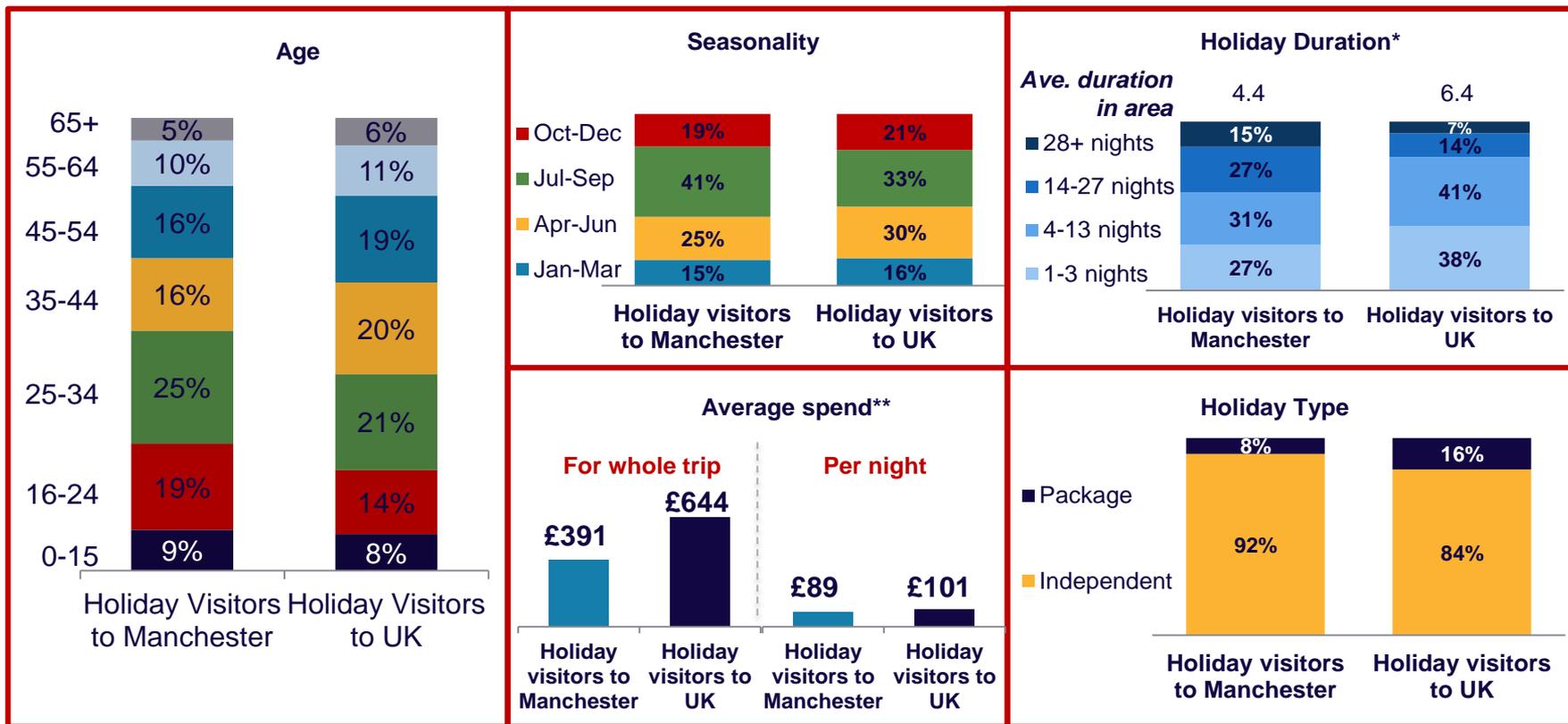


Note: This is based on all markets not just US

Source: IPS 2014-2016, Activities from IPS 2016 only

Demographics and holiday characteristics: All holiday visitors

- Holiday visitors to Manchester are more likely than the UK average to be aged 25-34, staying in the peak summer season, on a longer holiday and to have booked their holiday independently.
- On average holiday visitors to Manchester spend 1.9 nights in the City.

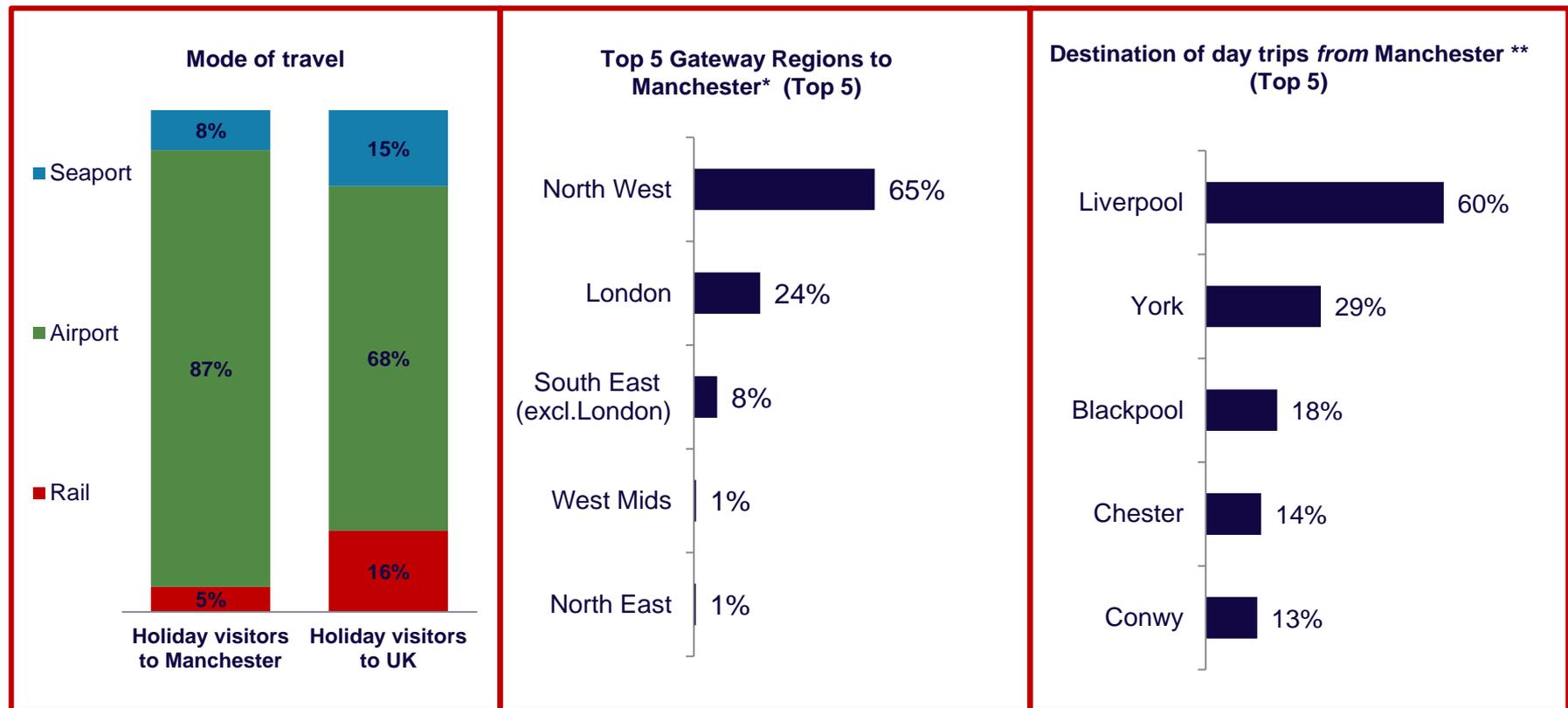


Note: This is based on all markets not just US

Source: IPS 2014-2016. *Note that duration *chart* refers to length of holiday overall for visitors to town, and *average duration* refers to duration in specified town. **Spend is for the stay in the city/town only, whereas spend for the UK covers the whole trip. UK average duration and spend is higher than town average due to cumulative visits to other areas for UK visitors.

Travel and destinations: All holiday visitors

- The vast majority of Holiday visitors to Manchester arrive via airport, and via a North West gateway.
- Notably, nearly a third of holiday visitors to Manchester arrive in the UK via a gateway in London or the South East. The most popular day trip destinations from Manchester are Liverpool, York and Blackpool.



Note: This is based on all markets not just US

Perceptions of Britain: Among Americans, perceptions of Britain are extremely positive and are unchanged post Brexit

Perceptions of Britain - Welcome

- Those on the West Coast are more likely to find the people of Britain welcoming compared to those on the East Coast*.
- 91% of departing Americans felt 'very' or 'extremely' welcome in Britain**.

Perceptions of Britain (%) among US market



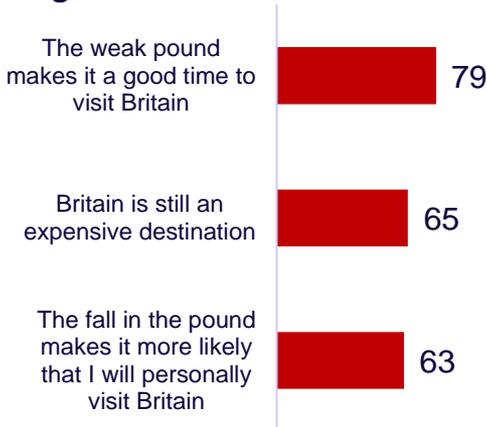
* Source: Key States of America Consumer Report, June 2017

** Source: VisitBritain Market and Trade Profile USA

Exchange Rate

- 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.

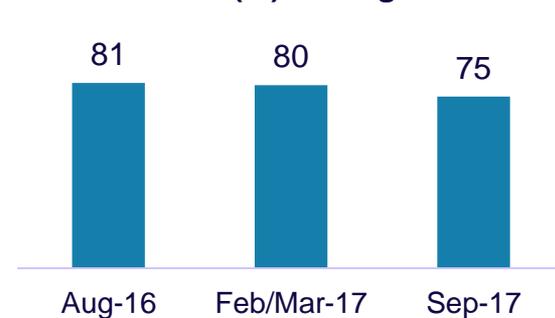
Exchange Rate Impact (%) among US market



Perceptions of Britain – Safe & Secure destination

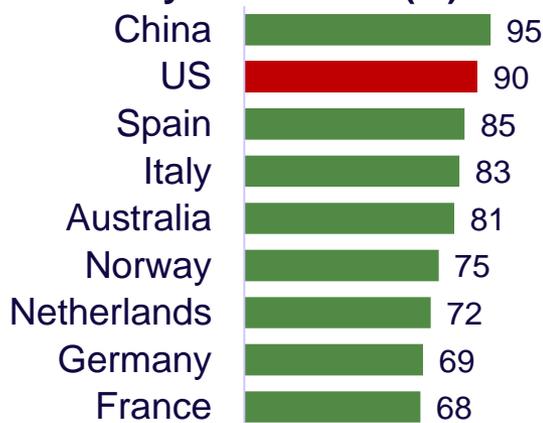
The threat and reality of terror is impacting traveller attitude & behaviour – the US market saw a notable decline in agreement with 'Britain is a safe and secure destination' following a number of terrorist attacks during 2017.

Britain is Safe & Secure destination (%) among US market



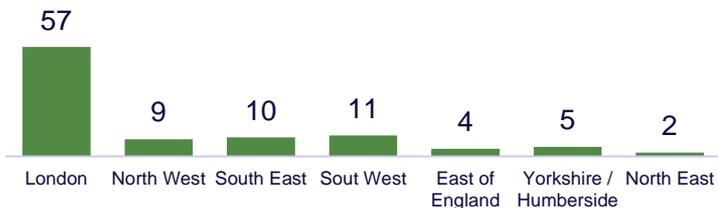
Interest in visiting England: Interest remains high among Americans but London remains the dominant location

Consideration of England as a holiday destination (%)



Source: Discover England Fund – Activities & Themes Research 2017

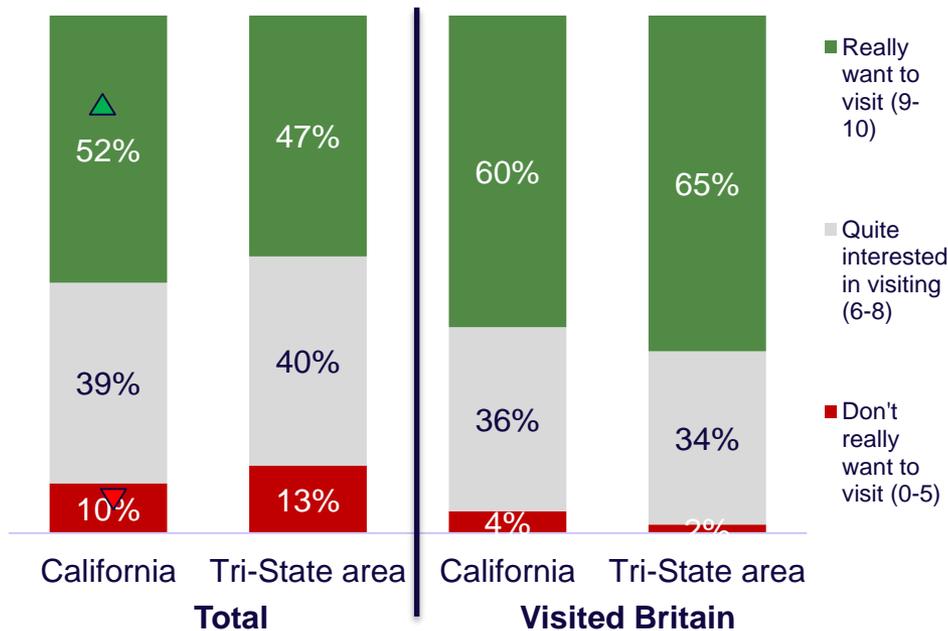
Where in England would you like to visit? (top of mind %) – US market



Source: Visit England International Omnibus, 2013

- Almost 6 out of 10 American holiday visitors* (excl. UK nationals) are making a repeat visit to Britain

Interest in Visiting Britain



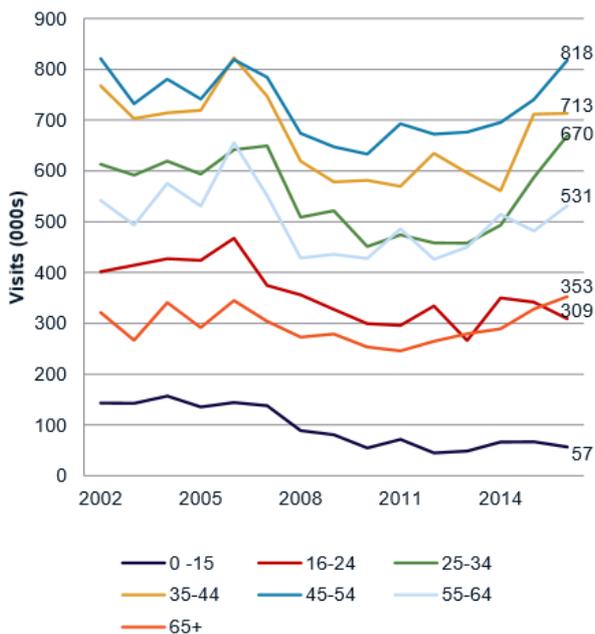
Source: Key States of America Consumer Report, June 2017

* Source: VisitBritain Market and Trade Profile USA

Demographics: US visitors to the UK by age and home state

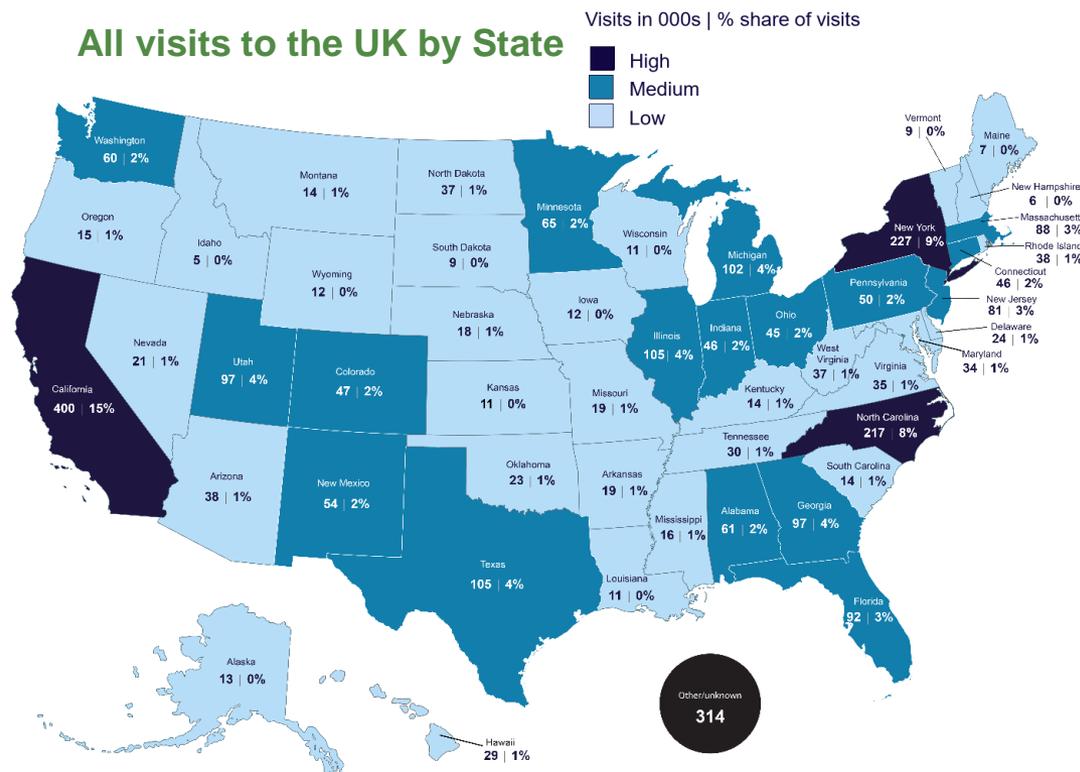
- American visitors tend to be older than the average visitor to the UK: 49% of American all visitors were aged 45+ compared to a total average of 39% .
- Within the US, the states of California (15%) and New York (9%) are the largest source markets for visitors to the UK. There are differences between those in California and Tri-State area. Californians state they have more opportunities to travel (55% vs 42% East Coast); and go on more vacations - 55% go on 2 or more vacations versus 48% East Coast.

All visits to the UK – US Visitors



Source: IPS, 2016

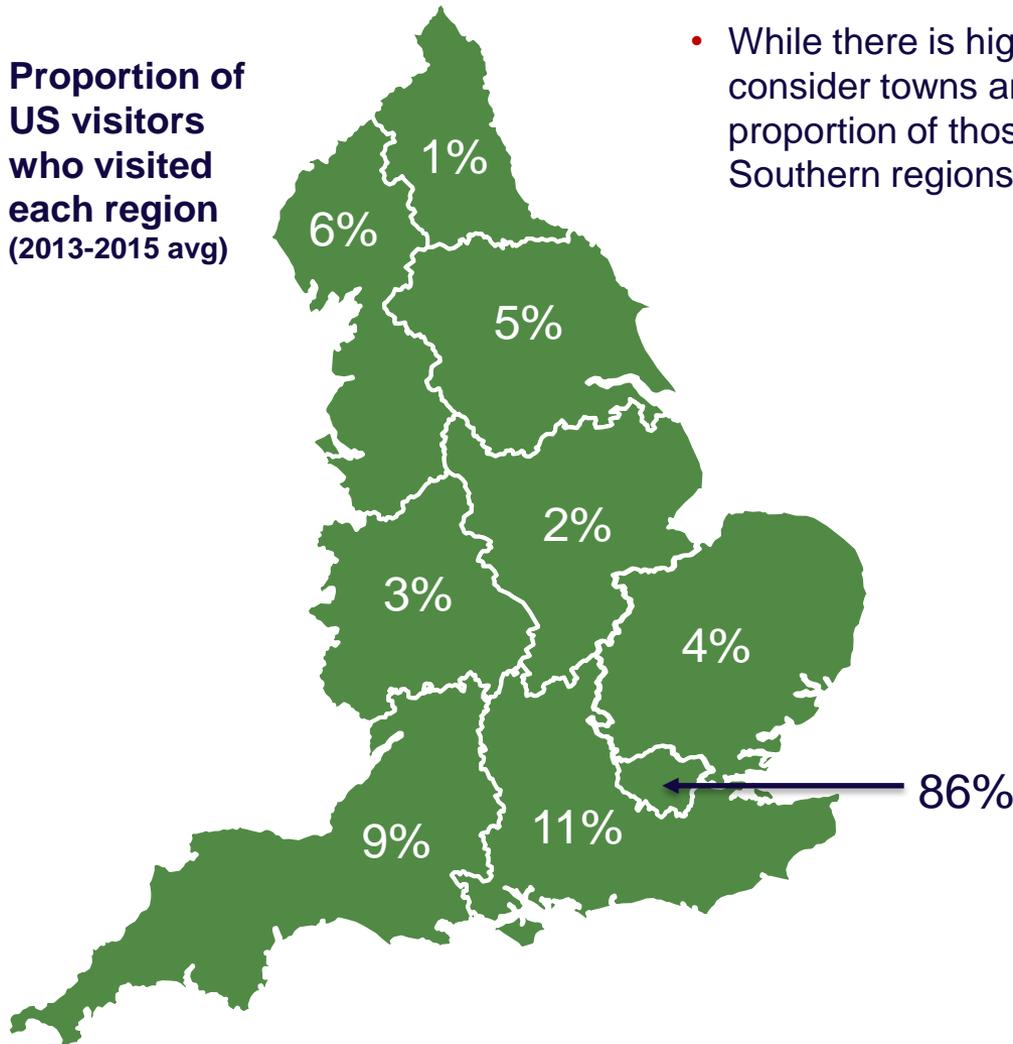
All visits to the UK by State



Source: Key States of America Consumer Report, June 2017

Destinations visited / considered: There continues to be a clear North / South divide in the regions Americans' visit whilst on holiday

Proportion of US visitors who visited each region (2013-2015 avg)



- While there is high consideration among Americans to consider towns and cities outside London, the actual proportion of those visiting regional England beyond the Southern regions remains relatively small.

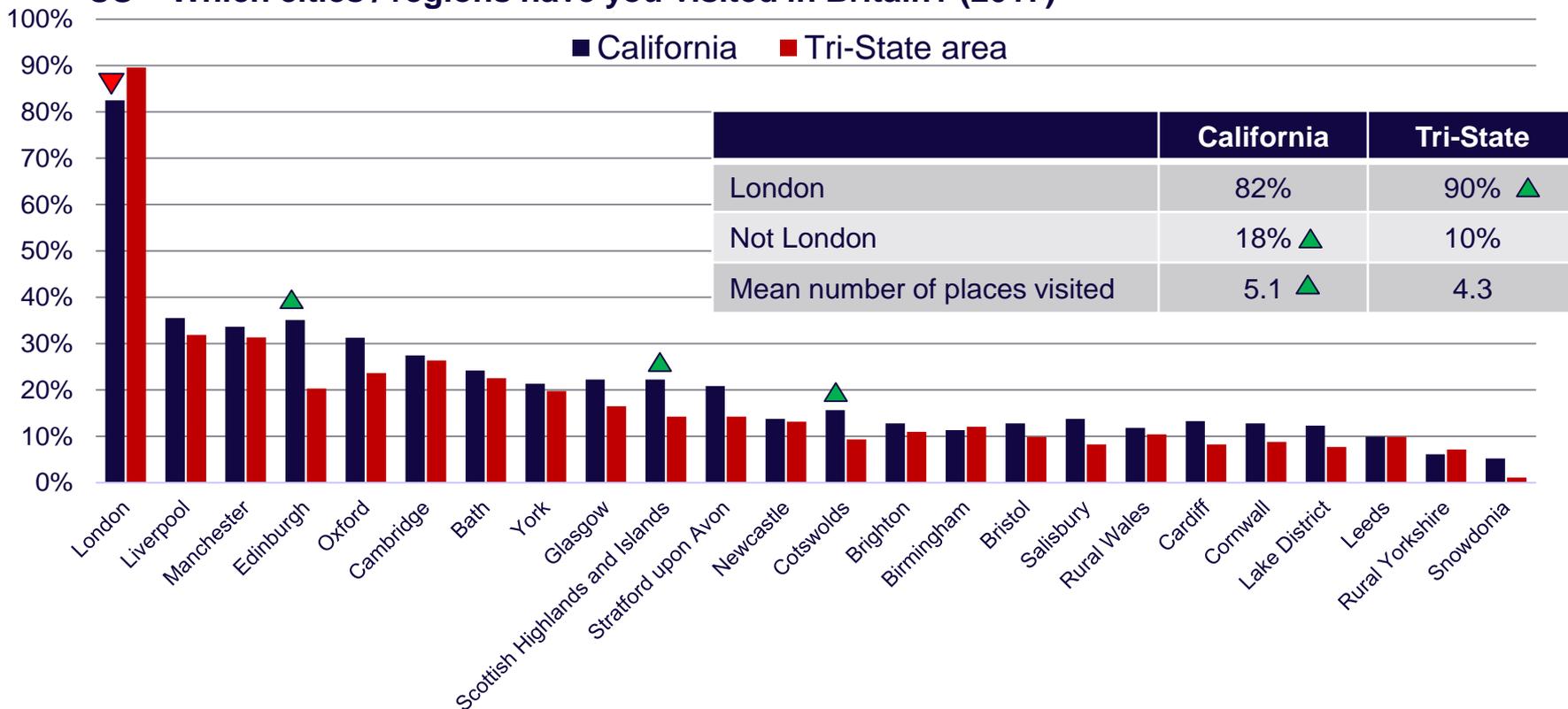
Locations considered in England by the US market

	DEFINITELY/VERY LIKELY
London	83%
Historic towns and cities (i.e. outside London)	74%
Countryside / villages	67%
Coastal or beach locations	62%
Modern towns and cities (i.e. outside London)	59%

Source: VisitBritain Market and Trade Profile USA

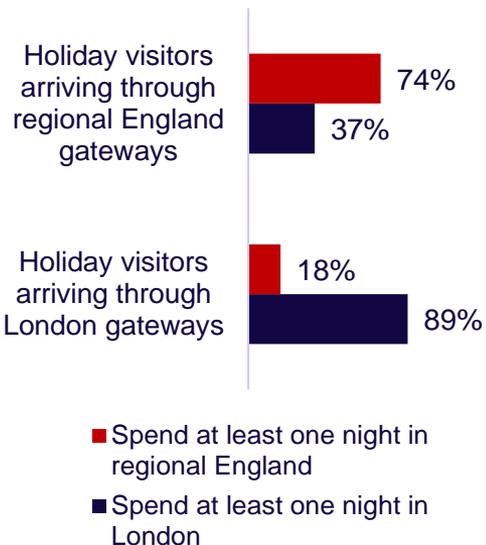
Destinations visited: Those on the East Coast are less likely to have visited cities outside London compared to their West Coast counterparts – but after London Liverpool and Manchester are the most visited cities

US – Which cities / regions have you visited in Britain? (2017)



Destinations visited / nights stayed: The majority of visitors tend to stay in or close to the region they have entered, with London and the South dominating visits and nights stayed among US visitors

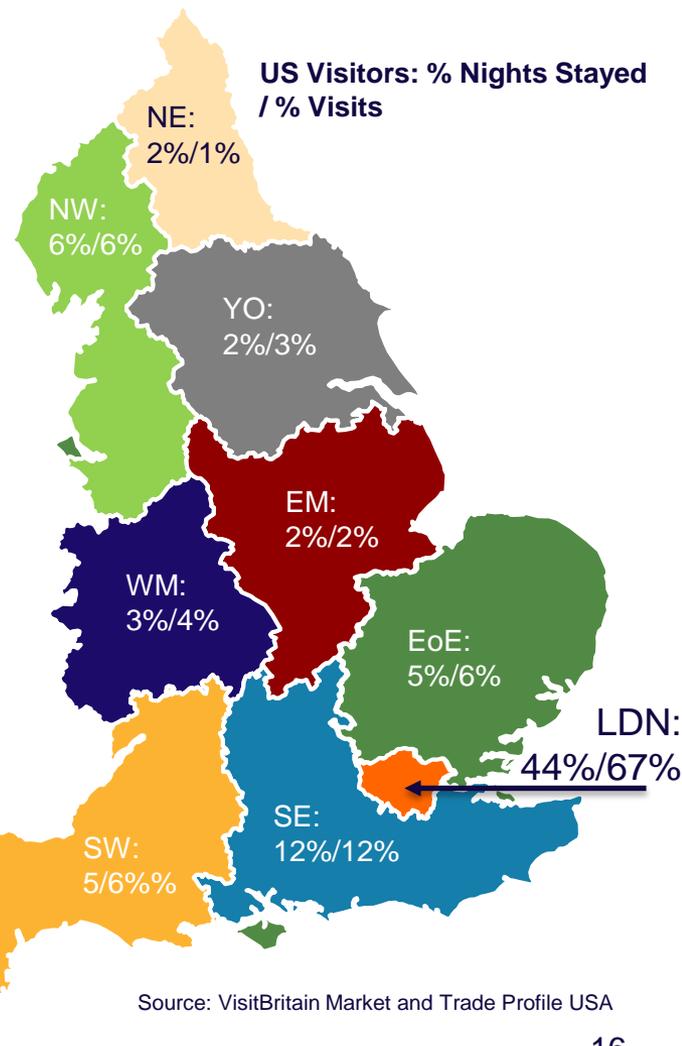
Where do they stay? (all markets)



US All visits to the UK in 2016

Region*	Nights stayed (000)	Visits (000)
Total	28,394	3,455
Scotland (SC)	4,109	451
Wales (WA)	410	85
Northern Ireland (NI)	316	54
London (LDN)	12,435	2,322
North East (NE)	612	39
North West (NW)	1,833	191
Yorkshire (YO)	484	99
West Midlands (WM)	926	149
East Midlands (EM)	657	74
East of England (EoE)	1,526	191
South West (SW)	1,513	214
South East (SE)	3,339	427
Nil nights (Nil)*	N/A	23

Source: International Passenger Survey by ONS * The region is based on the location in which the visitor stayed overnight



Source: VisitBritain Market and Trade Profile USA

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



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Challenges

Getting visitors to go
beyond London

London

Among Americans who visited London, there were a number of barriers to going beyond London and visiting regional Britain that need to be addressed

Barriers for not going beyond London among US travelers who visited London



3 Core Challenges

1) Transportation: An understanding of how to get to places in England

- We know globally, that visitors are **willing to travel 2-3 hours from their initial base** (typically London) to stay in another destination.
- There is a nervousness among Americans around driving but car hire is still considered as well as other forms of transport (train, internal flights).

2) Competing with other destinations

- When considering Britain as a destination, France, Italy and Spain* are also in the consideration set.
- But London remains the biggest competitor when thinking about places to visit in England.

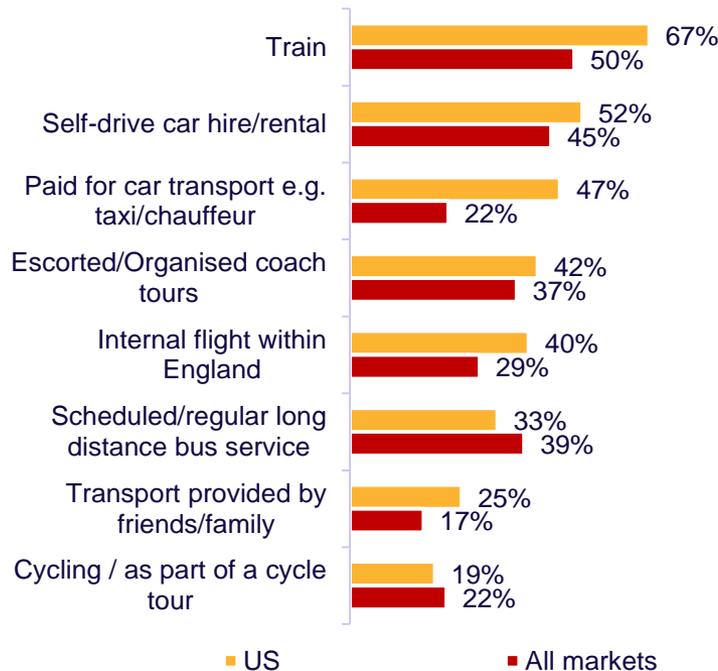
3) Low awareness of regional England

- 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) Transportation: US visitors will consider a wide range of transport options and there is high appeal for train passes

- Public transport is widely considered – but US visitors are much more likely to want to use the train and internal flights rather than long distance bus services (something to consider for London Plus visitors).
- Train passes are also considered by 60% of those who have visited Britain* (source below).
- There is consideration for self-drive car hire, which will help with the Manchester Plus offer – detailed journey planners (times to places, best route to take etc) may help address the nervousness around driving that exists.

Types of transport considered



- For destinations that need to be reached using public transport (i.e. Manchester Plus offer), 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 have the confidence.
- Particularly among visitors from the US, there is a perception that travel is too expensive outside London. However, inbound visitors from the US who have experienced our rail system are generally positive.

- Considerations:**
- Simplify and provide targeted information (via your website) on public transport options.
 - List travel times from major hubs to your destination(s) – particularly for the Manchester Plus offer.
 - Promote BritRail passes and pre-booking e.g. highlight that booking trains in advance reduces cost considerably.
 - Promote off-peak/shoulder seasons when transport is quieter.

2) Competing with other destinations: Those in the target demographic are more likely to consider a wider set of destinations when considering Britain, with Europe being the main competitor

When deciding to visit Britain, which other countries were on your shortlist? (US visitors to Britain)

	18-34	35-44	45-54	55-64	65+
Europe	76%	85%	84%	81%	84%
North and Central America	37%	52%	31%	34%	37%
Asia	25%	30%	22%	15%	20%
Oceania	24%	38%	20%	14%	27%
South America	21%	21%	17%	10%	18%
Middle East	14%	23%	15%	7%	16%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in consideration of destination.

- 35-44 year olds considered a wider set of destinations.
- And as such were more likely to consider other European destinations alongside Britain.

European destination on the shortlist (US visitors to Britain)

	18-34	35-44	45-54	55-64	65+
France	42%	54%	42%	34%	35%
Italy	35%	55%	44%	32%	41%
Spain	36%	37%	29%	34%	39%
Germany	37%	41%	17%	27%	29%
Ireland	14%	20%	23%	25%	33%
Greece	19%	25%	17%	17%	16%
Switzerland	14%	25%	12%	15%	22%
Netherlands	11%	23%	13%	24%	18%
Scandinavia: Sweden, Norway, or Denmark	9%	12%	12%	19%	25%
Belgium	12%	15%	3%	14%	25%
Iceland	8%	14%	9%	17%	18%
Poland	5%	13%	7%	10%	8%
Czech Republic	4%	5%	3%	12%	12%

3) 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 of 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 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 discourages them from looking at other options.

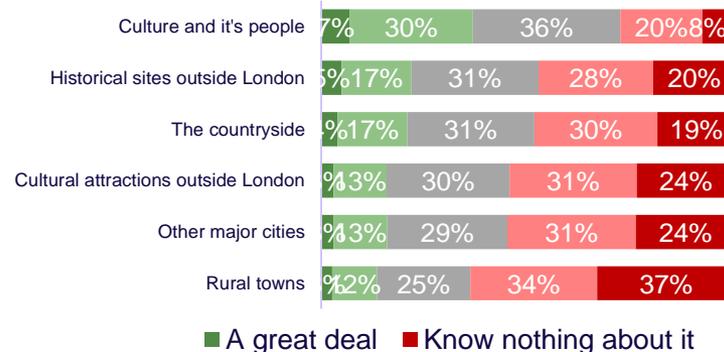
Considerations:

Helping consumers imagine the Manchester and Manchester Plus experience is key.

US: Where in Britain would you like to visit? (% top of mind)

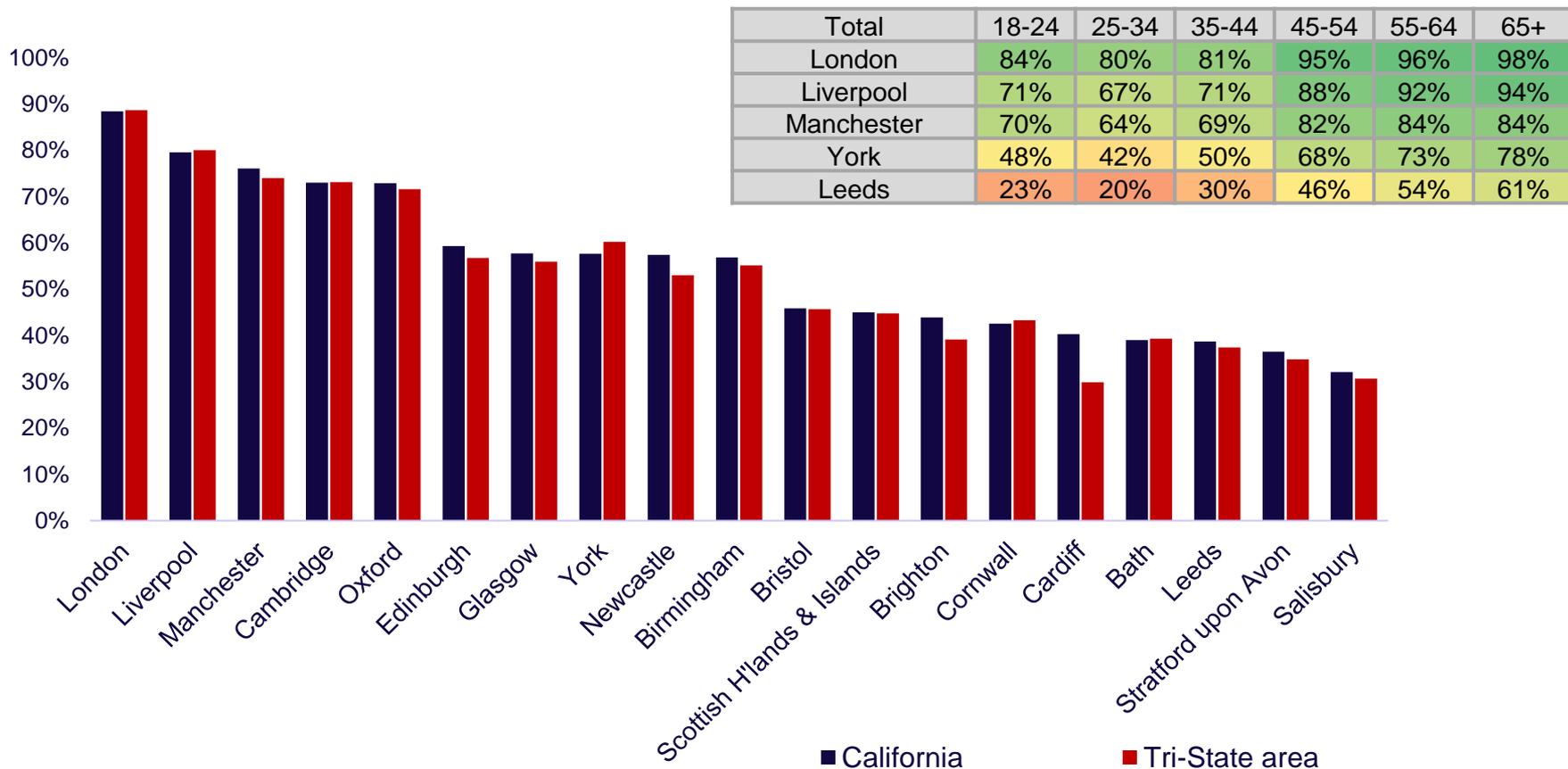


What do you know about Britain outside of London (all markets)?



3) Awareness of regional England: Manchester has reasonable awareness when prompted – but awareness is much higher among the older generation

Prompted awareness of British Cities



Source: Key States of America Consumer Report, June 2017



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Optimising itineraries for the
US market

Activities / experiences

It is a known fact that history and heritage are key drivers for visitation to England – but some US visitors also want experiences which deliver a sense of adventure and / or challenge

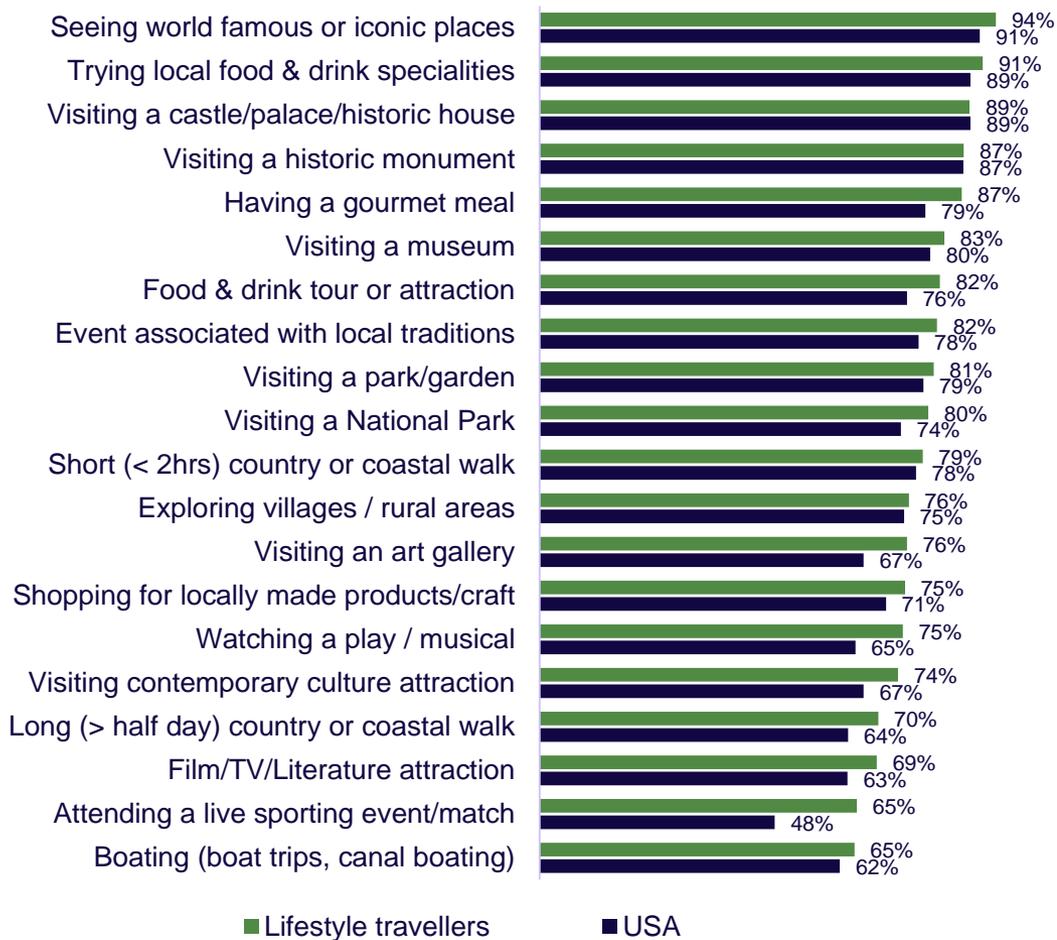
- The most considered activities are also the strongest drivers of visitation – i.e. history and heritage. **Food and drink are relatively key**, but in the sense of local specialities (gourmet meals is an average driver).
- US visitors are **more likely to want a challenge** and / or action.

US: Consideration of Activity Clusters on holiday to England

		DEFINITELY/VERY LIKELY	INDEX CONSIDERATION
	Visiting famous / iconic attractions / places	72%	88
	Exploring history and heritage	71%	96
	Experience city life	67%	94
	Experiencing rural life & scenery	61%	100
	Outdoor leisure pursuits	60%	105
	Attending cultural music / sports events	56%	104
	Challenge and / or action	37%	120

The top 20 activities among Lifestyle Travellers can help identify the best itinerary concepts

US: Most considered activities on holiday to England

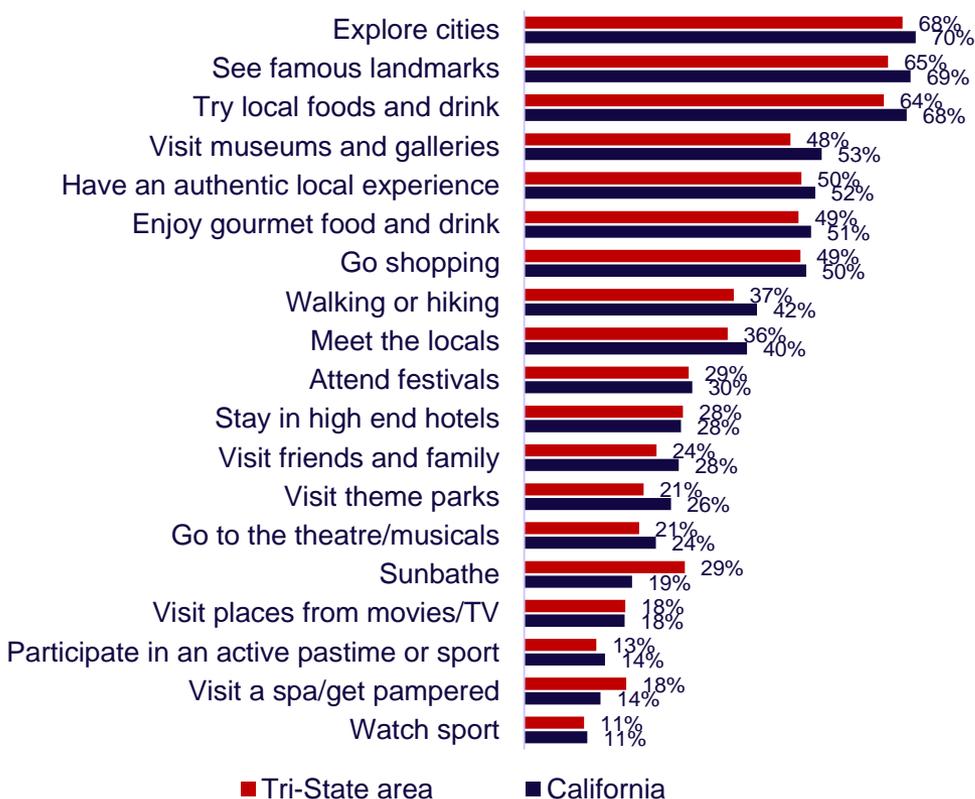


Itinerary concepts most likely to appeal to the US market:

- Iconic / world famous places
- Historic places
- Food & drink experiences
- Outdoor pursuits (including National Parks, short walks)
- City based attractions (museums, art gallery's contemporary culture)
- Sporting events

The types of activities preferred whilst on holiday do not differ too much between East and West Coast residents of the US – exploring cities, visiting famous landmarks and trying local food and drink are top preferences

US: Preferred international vacation activities



Please note a slightly different list of vacation activities was used in this study compared to that used in the IPS study

Source: Key States of America Consumer Report, June 2017

Considerations:

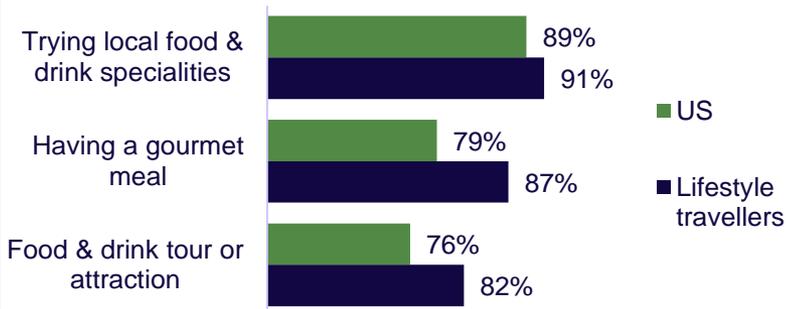
- While relatively low on the list, being pampered is something that appeals more to those in the Tri-State area and younger audiences. Going shopping is also more appealing to younger audiences.

	Under 35	35-44	45+
Explore cities	61%	61%	77%
See famous landmarks	52%	57%	80%
Try local foods and drink	54%	58%	77%
Visit museums and galleries	39%	44%	60%
Have an authentic local experience	38%	47%	60%
Enjoy gourmet food and drink	43%	49%	55%
Go shopping	56%	51%	46%
Walking or hiking	38%	41%	40%
Meet the locals	32%	31%	45%
Attend festivals	30%	32%	29%
Stay in high end hotels	29%	30%	27%
Visit friends and family	31%	29%	21%
Sunbathe	23%	28%	23%
Visit theme parks	38%	32%	12%
Go to the theatre/musicals	24%	23%	21%
Visit places from movies/TV	25%	21%	13%
Visit a spa/get pampered	20%	19%	12%
Participate in an active pastime or sport	17%	17%	10%
Watch sport	17%	15%	6%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in preference to these activities.

Food Experiences – Additional Considerations: Food & drink is rarely the main reason to visit England* but can play a significant supporting role

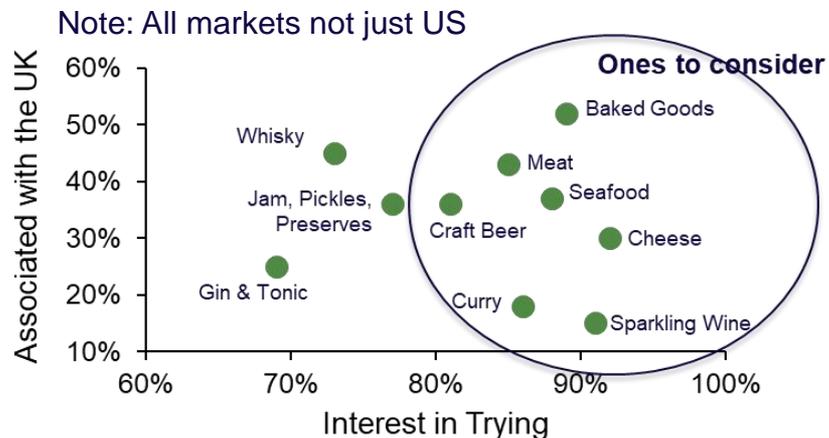
Consideration of Food experiences – US market:



Source: DEF Themes and Activities Research 2017

- **Trying British dishes** is of interest, particularly fish & chips (56% extremely/very interested), roast dinners (53%), full English breakfasts (52%), and afternoon teas (46%).
- Typically, higher interest from the US when compared to the global average.

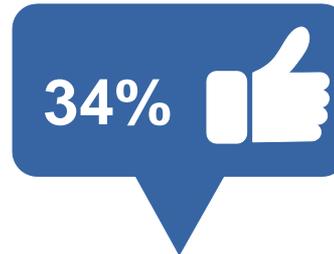
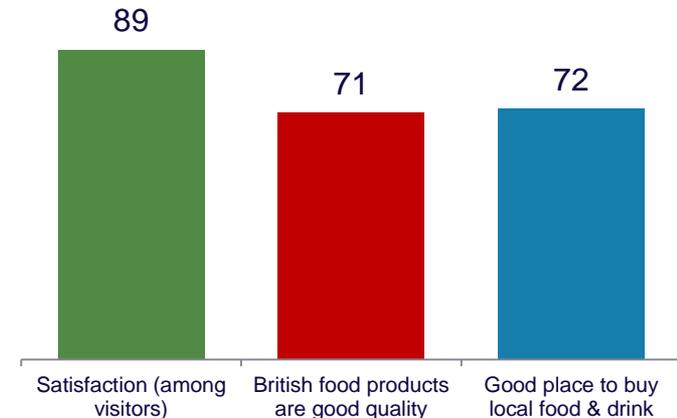
- There is an appetite to try food & drink related activities among those considering visiting England.
- There is most interest across all target markets in trying local food & drink specialities compared to other food experiences – and the **low association of some of these could be expressed as a unique experience:**



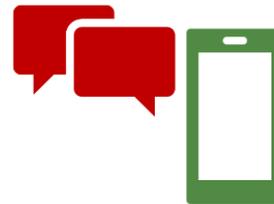
Visit Britain have a site dedicated to promoting Food Hubs and Itineraries for the trade industry - <https://trade.visitbritain.com/destination-uk/food-and-drink/>

Food Experiences – Additional Considerations: The US audience generally has good perceptions of food in England. But they do look at reviews so any suggested food experiences promoted need to be of good quality

Satisfaction with Food & drink among US visitors to England (%)



- 34% of Americans have **used social media to look for recommendations for places to eat or drink** whilst on holiday. This is higher than the global average 30%.



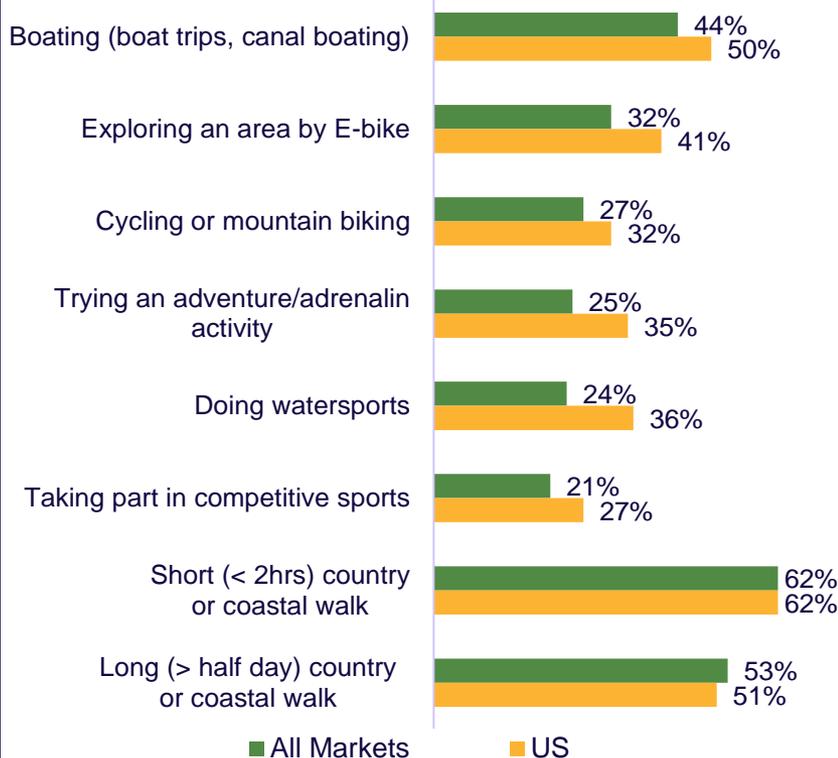
- 68% of Americans have used a **smartphone to access reviews about places to eat or drink**. This is higher than the global average of 54%.

Considerations:

- Given the Americans' high use of technology to find places and access reviews, if not already considered, helping visitors find unique or the best places to sample local food and drink should be considered – both in Manchester and the Manchester Plus offer.

Outdoor pursuits / Challenge: 37% of Americans are likely to consider challenge / action activities when on holiday. Compared to the market average, Americans over-index on many active activities

Consideration of active activities – US market:



- Active activities are popular with the younger segment and have particular appeal in the US market.
- A sense of being challenged could fit well with the Manchester Plus offer – from short walks to adventure/adrenalin activities as well as exploring the city using the new ‘MoBike’



Mobike UK general manager, Steve Pyer, with one of the bikes that will soon be a regular sight on the streets of Manchester (Image: Manchester Evening News)

The concept test around the Manchester offer highlights the appeal of not only the Manchester city offer but also the Manchester Plus offer



Key concept drivers

Discover Manchester's delights

I love the idea of going to a city I've heard of but don't know much about – especially one that turns out to be a bit different to the usual tourist destinations.

Manchester is one of England's most stylish and distinctive cities, with a vibe and warmth that is distinctly Northern. Not only does it have a heart of culture & energy, it is the gateway to some of England's most awe-inspiring sites and experiences.

By day, there are hundreds of great shops, as well as a range of cultural sight-seeing tours. By night, you'll find a wide variety of restaurants and legendary nightlife, whether you are into cocktails, clubbing or live music. After a night on the tiles, you can relax and regain your energy in stylish and comfortable hotels, or recharge your batteries in the spa or salon.

Once you have the city under your belt, it is time to sample some of England's most awe inspiring sites, with six World Heritage Sites on the doorstep. It couldn't be easier – with direct flights from 16 major North American cities and excursions you can book before you travel or when you arrive, we can guarantee you'll be glad you came.

Manchester Gateway: It all starts in Manchester...

Proportion of respondents highlighting what they thought were drivers or barriers on the holiday offer text they were shown	Key	
0 - 10%		
11 - 20%		
21 - 30%		
31 - 40%		
41% +		

"It seems like a lot of time in a city and I would like to see some countryside"

"That you are stuck visiting this one city.... no country... historical sites?"

- The text to the left was shown to potential US visitors to understand which parts of the concept resonated most.
- The highlighting pinpoints which words are most positive in driving uptake of the product.
- History stands out as a key driver – being able to visit World Heritage Sites (although we would recommend testing whether the word 'doorstep' is truly understood – and whether they would feel that this was in the City Centre itself).
- Cultural sightseeing tours are also appealing, as well as shopping, food and nightlife.
- However, the words nightlife, clubbing and live music were both drivers and barriers – suggesting that these aspects shouldn't be in the forefront of marketing communications.
- Clarity of how many nights in Manchester versus Manchester Plus should also be considered.

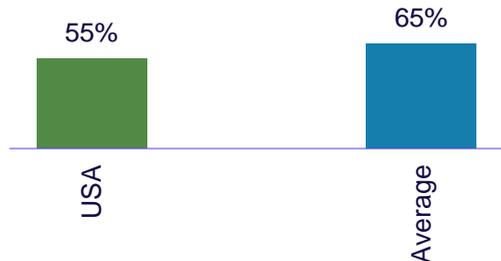
There is a real desire to experience new and different experiences among Americans - this is not only in terms of the activities but perhaps the types of accommodation in the offer

- New and different experiences are an important part of international vacations for both those in Tri-State area and California (44%/45%).
- Spending the night in a castle and exploring Britain by train are the most attractive experiences from the batch of experiences tested. Travelers in the Tri-State area are more likely to say farmers markets are appealing.

Future Traveler Trend – The Pursuit of Real

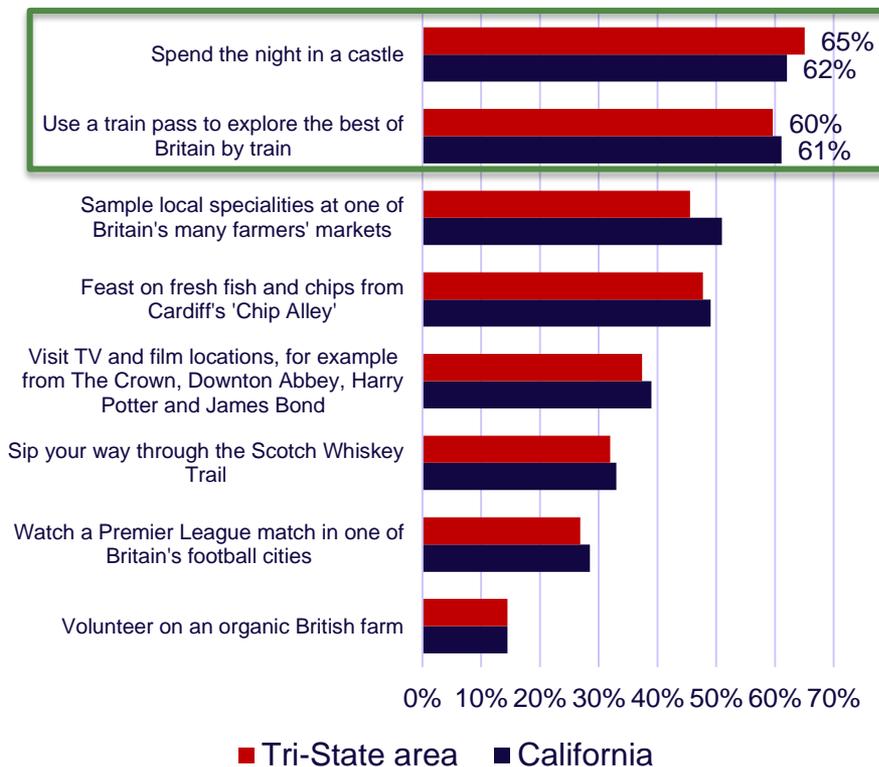
Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

“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



Source: Discover England Fund Travel Trade Research, 2016

US: Some of the things you can do in Britain, which are appealing ...



Source: Key States of America Consumer Report, June 2017



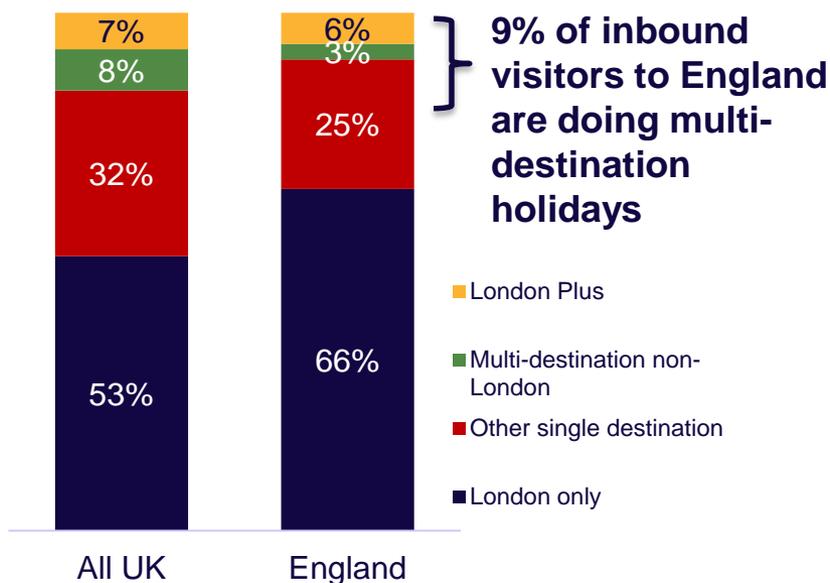
Optimising itineraries for the
US market

Multi-destinations /
duration

Currently only 9% of inbound visitors to England (across all markets) are doing multi-destination holidays in England – the highest proportion are London Plus

- Note, whereas 15% of trips to the UK are multi-destination trips of UK destinations, only 9% are multi-destination trips to England destinations. This demonstrates the high volume of holiday multi-destination trips involving Scotland.

Share of multi-destination visits – all markets (avg. 2013-2015)



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



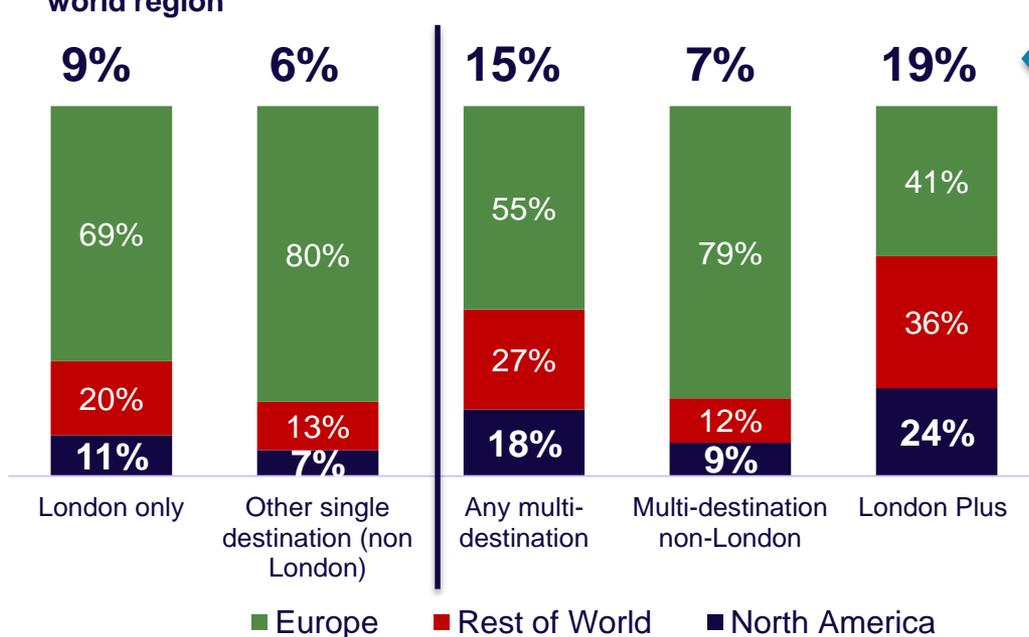
Important note: Multi-destination visitors include only those who stayed overnight in more than one destination. They exclude visitors who only took day trips to other destinations from their single place of stay. A further report will be produced later in 2017 which incorporates these days trips, using questions placed on the IPS during 2016.

Definitions

- London Plus - a visitor who stayed in both London and at least one other destination in the UK / England for at least one night
- Multi-destination non-London – a visitor who stayed for at least one night in two or more destinations in the UK / England, but did NOT stay in London

Those in North America are most likely to be taking London Plus holidays, more so than are taking multi-destination holidays in England which exclude London

Source markets for multi-destination holiday trips in England by world region



Source markets: US

- Long haul visitors (US included) are more likely to be London Plus visitors (+1 or more regions) while visitors from Europe are more likely to be visiting multi-destinations outside of London.

A point on seasonality:

- **Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period**, with 50% of multi-destination trips to England taking place between July and September. This is similar for both London Plus (48%) and non-London multi-destination (53%) trips.

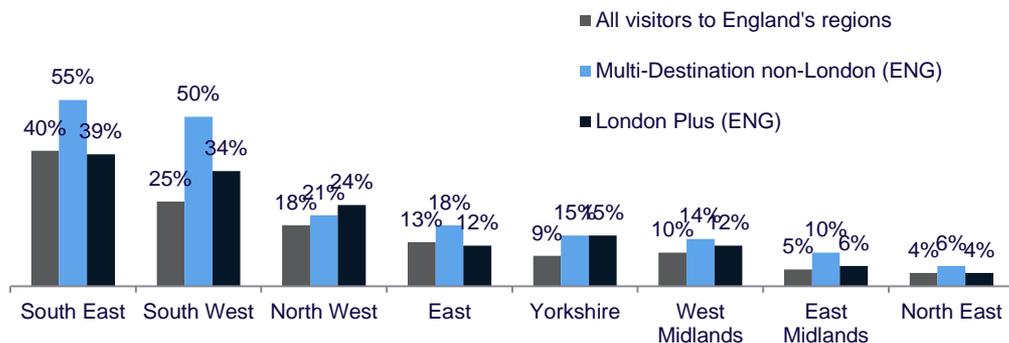
Considerations:

- As Marketing Manchester are positioning their product as an all-round opportunity, it should consider the seasonality that is evident among those who are taking multi-destination trips within England.

- Multi-destination holiday trips are much less likely than single destination trips to take place between October and March.

The North West and Yorkshire are likely to be visited in combination after the South East and South West combination

Regions stayed in by England multi-destination holiday visitors – all markets (avg. 2013-2015)



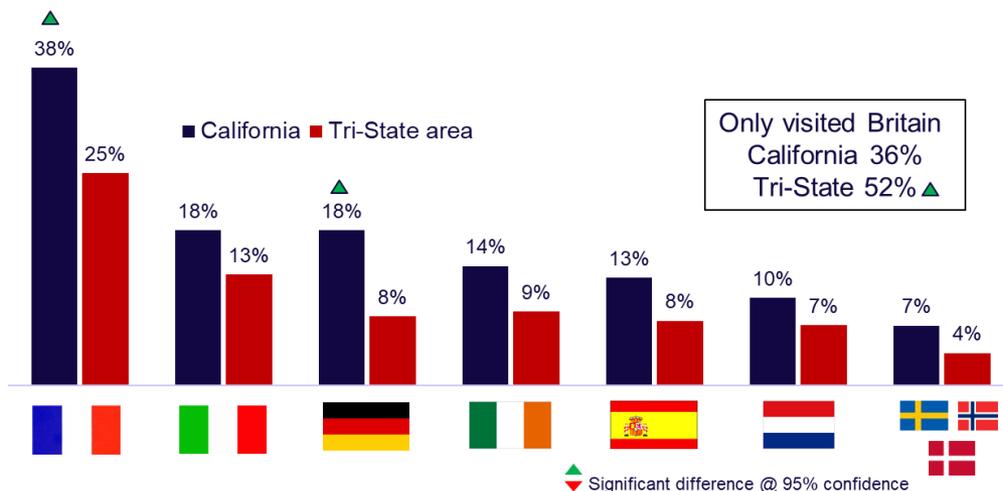
- The South East and South West are even more dominant when it comes to multi-destination holiday trips. This is the case for both London Plus holiday trips and, in particular, multi-destination holiday trips which do not involve London.
- Although the South East and South West are also the most frequently stayed in regions within the London Plus market, the North West (24% of London Plus holiday trips involve a stay in this region) and to a lesser extent, Yorkshire (15%) are also well represented.

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

	North West (NW)	Yorkshire (YO)	West Mids	East Mids	East	South West (SW)	South East (SE)
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%

When thinking about itineraries for the US, Marketing Manchester should also consider that a relatively high proportion of visits to Britain, especially among the target age group, involve stays in other countries

Other countries visited at the same time as Britain



- Californians are more likely to visit multiple countries as part of their trip to Britain, with France, Italy and Spain top choices.
- Tri-Staters are more likely to only visit Britain.
- 18-44 year olds are more likely to visit other countries at the same time as Britain.

	18-34	35-44	45-54	55-64	65+
France	36%	43%	26%	22%	27%
Italy	16%	31%	10%	8%	8%
Germany	18%	26%	5%	7%	6%
Ireland	13%	10%	12%	14%	10%
Spain	13%	15%	5%	7%	10%
Netherlands	12%	8%	12%	3%	6%
Scandinavia: Sweden, Norway, Denmark	8%	5%	3%	5%	6%
Only Britain	41%	35%	50%	46%	49%

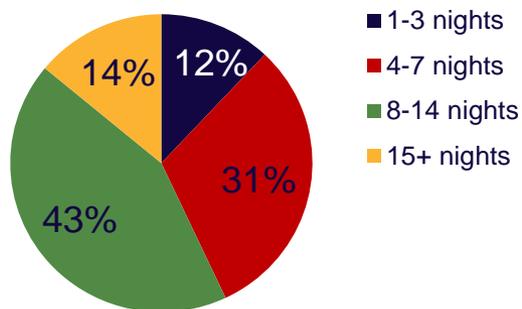
How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %
Differences across the rows indicate differences in countries visited

On average US visitors to regional England tend to stay between 7-14 nights - and the length of stay increases among repeat visitors

Average number of nights stayed in England – US Visitors (2015)

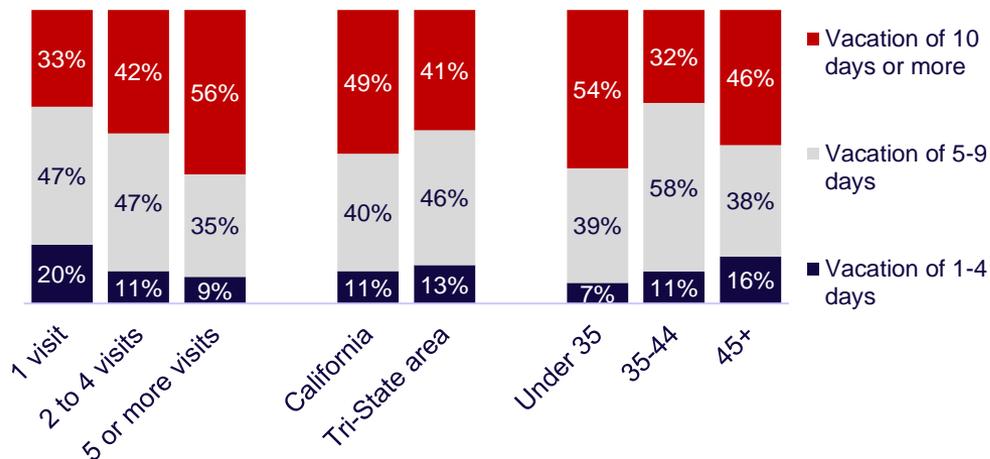


Duration of stay in England – US Visitors (2015)



- Visitors from California are more likely to take a longer trip compared to those from the Tri-State area.
- Repeat visitors spend more time in Britain.

Length of vacation in Britain



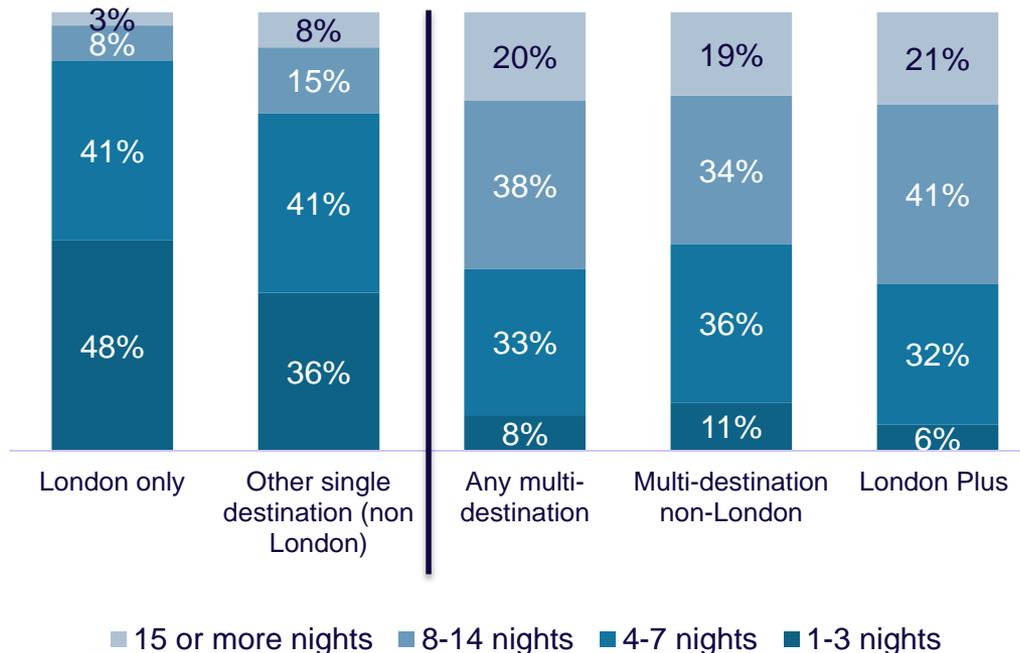
Source: Key States of America Consumer Report, June 2017

Considerations:

- If not already being considered, different itineraries for first time visitors versus repeat visitors should be discussed.

London Plus visitors stay longest on average, with 62% spending 8 nights or more in England

Length of multi-destination holiday stays in England (% Visits – avg. 2013-2015) – all markets



- When it comes to the length of time spent in England, London Plus holiday visitors stay the most number of nights, with 62% spending 8 nights or more in England.
- London Plus visitors stay longer than non-London multi-destination visitors (only 53% of these visitors staying 8 nights or more).
- Conversely, almost half (48%) of visitors on a London only holiday trip stay only 1-3 nights. This is significantly higher than those on a single destination holiday trip to a destination outside of London (36%).



Optimising itineraries for the
US market

**Developing the Manchester
and Manchester Plus offer**

Development of the Greater Manchester Offer and Manchester Plus offer: Overview of Goals

Strand 1) Developing Manchester's Offer

Refine and develop the new city sightseeing tour by bus route and develop sustainable distribution channels to support its year round operation increasing service frequency.

It will lay the foundations for a new set of Greater Manchester half-day experiences and we will develop city sightseeing so that it can be experienced on foot, by tram and by boat.

Our city sightseeing product will become more visible, more bookable and easier to access as we develop the network of outlets and advocates across the city and promote it direct to consumers post arrival.

Strand 2) Day Excursion Development

In round 1 a set of 10 self-guided day excursions were piloted into North West England and Yorkshire that will run for the first time in 2017.

Our round 2 project will evaluate, adjust and refine and further develop these for 2018. We will take the most popular excursions and scope the opportunity to turn them into excursions by coach/driver guides, as well as by rail.

The excursion programme will become easier to book as we develop a network of booking and ticketing channels and engage with the US travel trade.

Strand 3) Overnight Excursion Development

Products and experiences that are currently difficult to access from Manchester, because they are in remote locations or are a considerable distance, will be brought into the excursions programme.

We will lay the foundations for a set of overnight excursions into Northern England reaching into Cumbria, Northumberland and Durham and create an incubation programme for Northern businesses with international potential. Working with UK ground handlers or DMCs is critical to the success of this.

1) Developing Manchester's Offer: Sightseeing Tours

- The current bus sightseeing tour fits well with the types of history and culture the American visitors would want to see. And there is certainly appetite among the target audience for guided tours rather than independent exploration.
- But based on reviews from TripAdvisor, it appears that there are improvements that can be made to the Manchester bus sightseeing experience (see next slide).
- **Shared learnings across the products offered** can help to ensure experiences tap into what visitors are truly looking for:

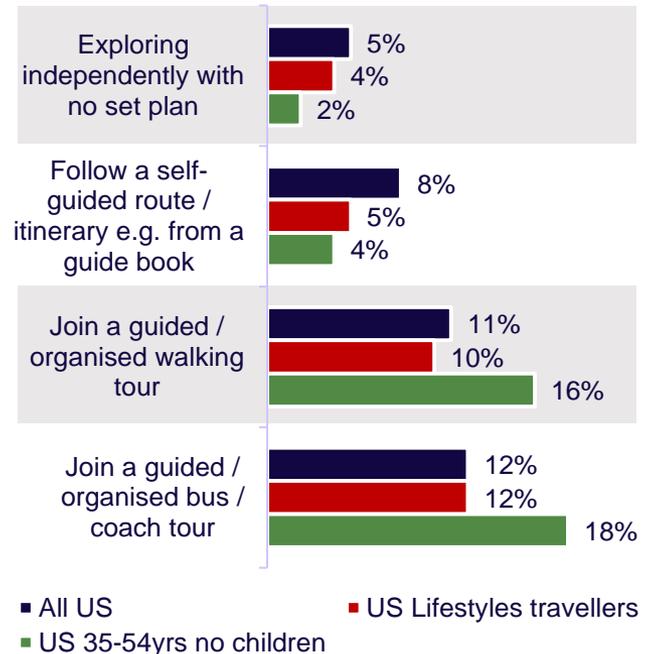
- Walking Tours around Manchester by locals (free and paid for) have great reviews – praised for the **in-depth knowledge of the tour guides** as well as their **enthusiasm** and the ability for the tours to be **personalised**.

“Andrew, our guide, is a retired history professor with exceptionally strong knowledge of Manchester and a passion for history. We learned so much more than we would have had we walked around on our own. The walk was customized for our interests and was very well designed and paced”. (Pasadena)

- Reviews from Taxi tours highlight the other commentary that enthruses people – **not just historical events but history of the music scene**.

Whatever your interest: music, football, architecture, history across the decades, or the mix of interests so many of us share, you will be so glad you booked your personal tour. (New York)

Exploring / seeing sights on holiday: Always / Frequently do



1) Developing Manchester's Offer: Customer feedback from the sightseeing tour highlights areas that could be improved to create a better experience

- While feedback was limited on TripAdvisor customers did provide some pointers as to where this experience could be improved.

Mixed reviews from the Bus Tour:

"Brilliant tour with loads of information and lots of landmarks visited. The tour was interesting and good value".

"I can assure you that you will not experience Manchester from this tour. There is great world changing history here. Genuinely world changing on a huge scale. There are great neighbourhoods, life, parks, people, characters, attitude [that the tour did not cover]."

1) The commentary

1. Customers would like more information from the commentary - references to history & popular culture (people, music, TV and films) could help here.
2. Live guides would be appreciated by some visitors – chiefly those who have been on other bus tours in other cities.

"Commentary was dull and very patchy and the sound quality was poor".

"With such a rich history there is plenty to say about the history and personalities of the city, but lots of long stretches had no commentary at all".

2) The driver

1. With no tour guides, the drivers become the customer facing agents and representatives of Sightseeing Manchester.
2. They should be friendly and helpful, attentive to customer queries.

"Driver cranky. Drivers went very fast and even jumped a red light. Bus driver not the nicest, but drove good".

"Phil and the drivers are well mannered, polite and very patient. They engaged with the children helping us on and off the bus".

3) The Bus

1. A number of visitors mentioned the sound was hard to hear. Speakers located throughout the bus should resolve this.
2. Review of seats being used for the open top deck.

"The pre-recorded commentary was played over loudspeakers that were located at the front of the bus. At the back, it was almost impossible to hear anything. Was just too quiet with traffic and noise of the bus".

"I ended up with soggy trousers. The seat looked dry but the padding under the vinyl covering must have been wet through".

4) Getting off the bus

1. Wayfinding and ensuring a safe way to get off the bus is paramount.
2. The driver could announce the next stop for customers. Introduce information screens.

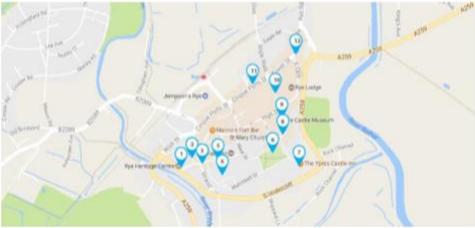
"There was no obvious way to tell the driver you want to get off, and no 'your next stop is' announcements. Meant passengers dangerously walking about on top open deck and trying to get down the stairs when the bus was moving. Later noticed the occasional buzzer, but not accessible from every seat".

1) Developing Manchester's offer: In the US, staying connected and the use of technology is now an accepted part of the holiday experience



Considerations:
 Helping visitors find unique or the best places to sample local food and drink should be considered – as well as location based information and promotions.

Geo-Tourist is an audio tour site and app that uses GPS data to play informative audio clips around touristic routes and advertise nearby offers and services to users

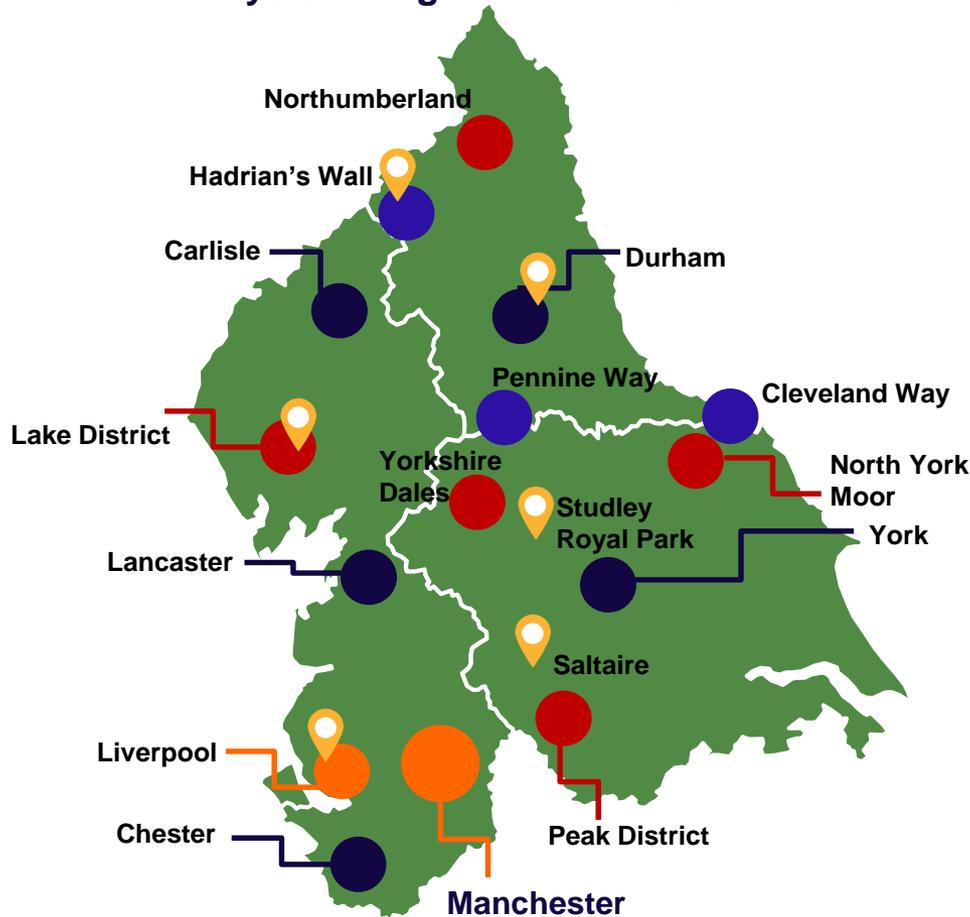


*“I can't think of anyone who wouldn't want to be given a promotion like free drinks at the bar when they are nearby. I think it's helpful as well if apps or companies **let you know what activities and landmarks are around you during your stay so that you don't miss out on anything**”*
 MALE, 34, US

Source: Technology and Social Media, 2016

2/3) Day and Overnight Excursions Opportunities: There are an abundance of options for a Manchester Plus opportunity, which will allow US visitors to experience history and rural Northern England

Potential Day / Overnight Excursions



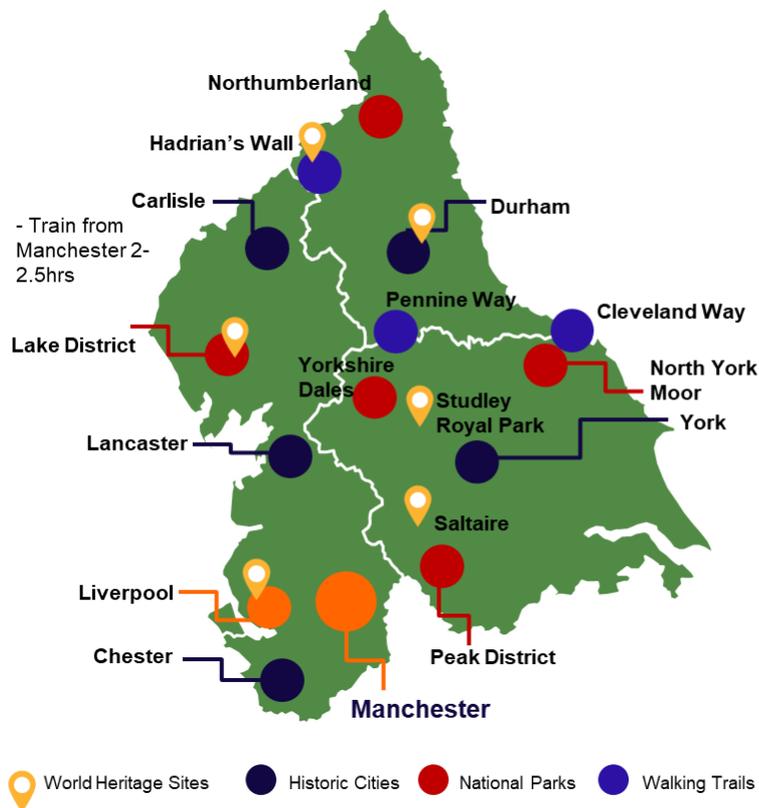
Key Locations / Experiences in 2-3 hours from Manchester:

-  6 World Heritage Sites
-  5 Historic Cities
-  5 National Parks
-  3 Walking Trails

Considerations:
 As detailed over the next few slides, there are opportunities for Marketing Manchester to work closely with other DEF project teams. These projects are looking ways to package products / itineraries across historic cities, national parks and walking trails across Northern England.

2/3) Day and Overnight Excursions Opportunities: Historic Cities Partnership

Potential Day / Overnight Excursions



England's Heritage Cities DEF Project Overview:

Created an app which allows visitors to explore attractions in 15 cities and unlock a collection of engaging stories using AR. By bringing AR 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.



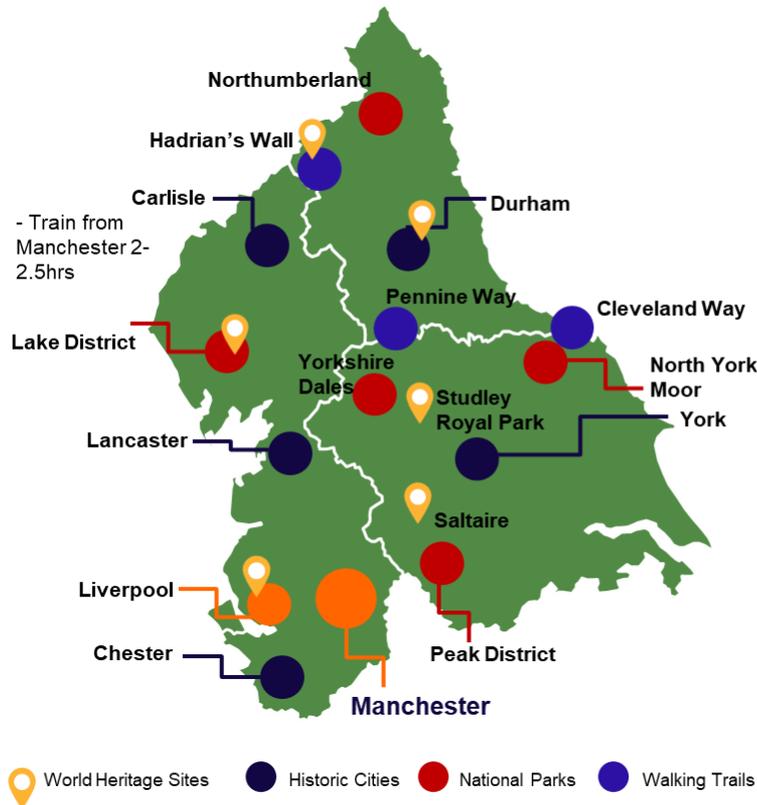
Distance from Manchester by Train

Historic City	Travel Time by Train from Manchester	Excursion type
Chester	~1-1.5hrs	Day
Lancaster	~1-1.5hrs	Day
York	~1hr 15mins	Day
Carlisle	~2hrs	Overnight
Durham	~2hrs	Overnight

Considerations: Partnerships with Historic Cities should be considered if not already underway. They are aiming to make their product bookable online and it offers a way of combining the Original / Modern City of Manchester with Historic English Cities. The use of AR offers an unique experience.

2/3) Day and Overnight Excursions Opportunities: National Park Partnership

Potential Day / Overnight Excursions



National Parks DEF Project Overview:

Travel trade focused proposition, developing the appeal of England's National Parks through the creation of new and immersive experiences. The experiences centre around 3 themes:

1. Outdoor Adventure – breath-taking activities across striking landscapes;
2. Living Landscapes & Hidden Histories – stories of a rich and varied culture steeped over 10,000 years;
3. A Place and its People – connecting with and exploring authentic England.

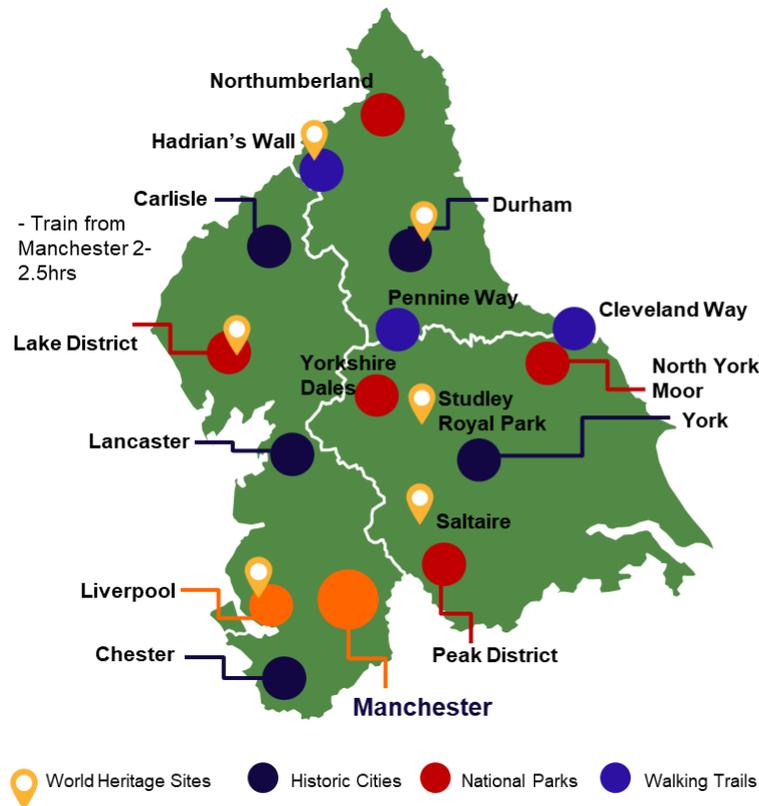
Considerations:

Partnerships with National Park group should be considered if not already underway. As well as the historic element, it offers the ability to provide more active or challenging experiences to those who visit Manchester.

Obviously travel to and from the National Parks needs to be considered – train travel is possible but the 'last mile' to activities can be more challenging.

2/3) Day and Overnight Excursions Opportunities: Walking Trails Partnership

Potential Day / Overnight Excursions



Walking Trails DEF Project Overview:

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. With itineraries from **3 to 14 days**.

Considerations:

There are three walking trails in distance of Manchester. Again, this partnership could offer something different for those who want to get off the beaten track / experience rural England.

Obviously travel to and from the Walking Trails needs to be considered – and length of itinerary marketed.



3. Gateway arrival and orientation

Gateway Arrival and Orientation: Overview of Goals

Strand 4) Gateway Arrival and Orientation

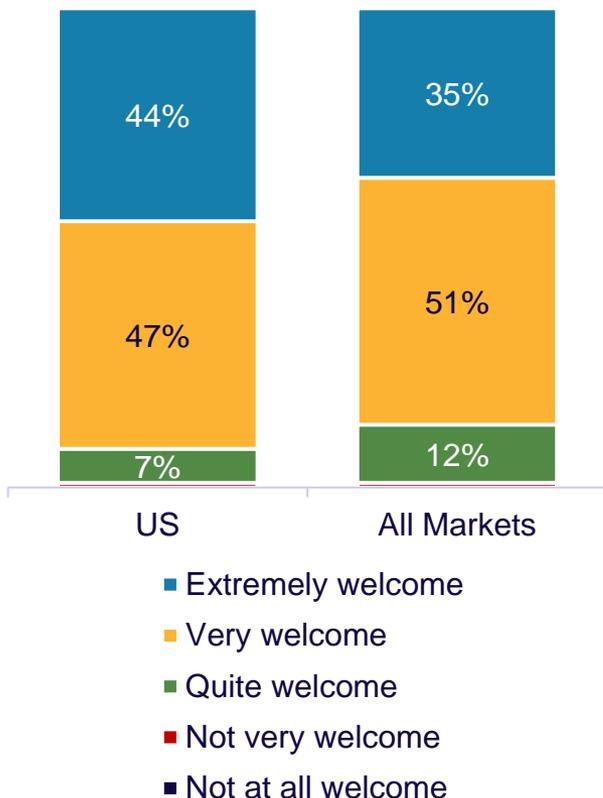
As the main international arrivals point into the North, Manchester Airport is in the prime position to ensure international visitors are greeted warmly and that they are persuaded by the information, images and messages in front of them to find out more and discover further.

Almost every passenger arriving into terminal 2 will be carrying a smart device and we will focus on this as a channel for welcome messages and orientation information.



Welcome: The majority of US visitors who have visited Britain stated they felt welcome, higher than the market average – however, there is some work to do around levels of customer service in food establishments

How welcome did you feel in Britain?



How would you rate the following in Britain compared to your expectations – US market



Welcome: Some considerations to make Americans feel welcome in England

Accommodation

- As many will arrive in Britain on overnight flights from the US, consideration for early check-in at hotels/accommodation is always appreciated, as well as some form of hospitality/services when they arrive (especially if their accommodation is not ready).
- Americans are used to larger rooms than are generally found in Britain, with their own private bathroom. Americans view accommodation as an important part of the travel experience. They will put a premium on staying at a grand/historic property or a hotel that reflects the local culture.
- The majority of Americans will want to stay in a 3-star plus property in a good/central location. They are used to larger beds.
- Health and wellness is trending in the USA. More Americans are looking for destinations which cater to that interest (e.g. Yoga, meditation, Spa, fitness facilities).

Language

- American English differs in many common words, and Americans find the British accent very interesting. This may cause confusion yet at the same time serve as an ice-breaker for visitors and locals alike. It forms part of the charm and intrigue that Americans appreciate about Britain and adds to the authenticity of the travel experience.
- According to the Central Intelligence Agency 79% of Americans' first language is English, and 13% Spanish.

Tipping

- Americans are very comfortable paying for goods and services with a credit card.
- America has a tipping culture when it comes to service, and tipping between 15-20% of the food total bill is standard. As a result of this, they will expect good service from restaurants, even on the budget side, with tap water provided and refilled as happens routinely in most US restaurants.

Propensity to recommend Britain differs across regions – being highest in London and lowest in the South East and West Midlands

Level of Satisfaction for holiday visits (% very satisfied) – All Markets

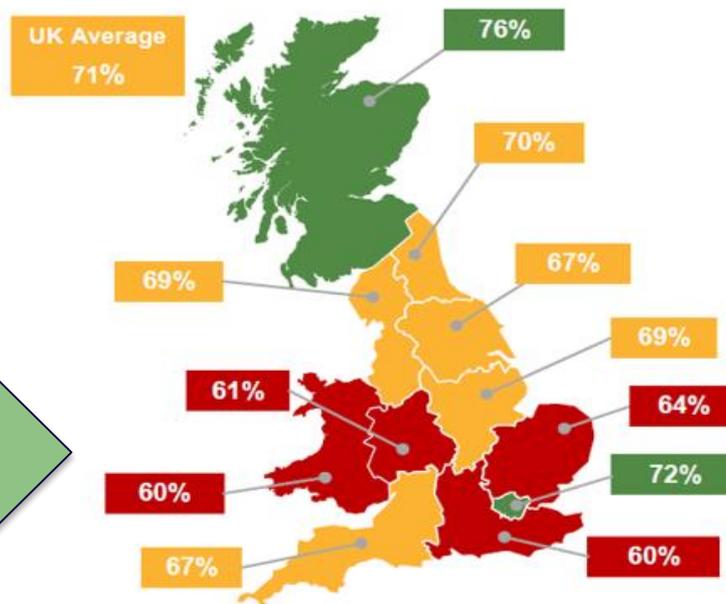
Market	Attraction/ Activities	Public Transport	Food & Drink	Value for Money
UK Average	65%	62%	39%	14%
London	68%	64%	39%	13%
North East	52%	58%	34%	20%
North West	63%	54%	41%	22%
Yorkshire	62%	47%	35%	22%
West Midlands	62%	50%	40%	13%
East Midlands	62%	62%	33%	18%
East of England	56%	52%	36%	12%
South West	50%	43%	36%	11%
South East	53%	51%	31%	10%
Scotland	66%	61%	48%	23%
Wales	54%	48%	35%	23%

London scores highest for attractions and public transport amongst holiday visitors, while value for money is just below average. There is a clear North-South divide on value for money perceptions with higher satisfaction for the North East, North West and Yorkshire.

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %.

Propensity to recommend Britain depends on the area visited. Holiday visitors to London gave the strongest recommendation scores out of all the English regions visited.

Recommendation by Region - % Extremely likely to recommend – All Markets



Some visitors stayed in more than 1 region. Data based on the first region visited.



VisitEngland

XV

Insight

4. Distribution and Promotion

- Travel Trade Perceptions

Distribution and promotion: Overview of Goals

Strand 5) Distribution and Promotion

In 2017 we will plan the promotion and distribution of our new product in the city, in the UK and in market. Our preparation will include developing messages and promotional tools, developing pre-arrival booking channels for the US trade and building an international marketing partnership across the North West of England.

Our plans will be implemented in 2018 and 2019. 2018 will focus on agents and tour operators, selling in the product and helping them to embed it in their England programmes and raising awareness of the new product within the city so that tourism businesses can provide support and international visitors are made aware post-arrival. Key activities include:

- Identify and build a relationship with a key distribution channel for the US trade, with VisitBritain.
- Undertake in-market sales mission activity in the US to personally sell the new products to agents and operators focusing on cities with direct flight connectivity to Manchester.
- Implement an engagement programme for UK-based in-bound travel trade to introduce the city sightseeing and excursions product.
- Improving the profile of Manchester and the North of England (building on Northern Tourism Growth Fund work) on key distribution/intermediary channels e.g. Expedia, Bookings.com, TripAdvisor.
- Implement in-destination consumer and B2B campaigns to raise awareness of the new product and signpost visitors to booking outlets and excursion collateral.
- Work with tourism businesses on the ground to promote the new products and facilitate bookings through a network of new on-the-ground sales agents.

This SWOT is based on travel trade views and how they perceive potential inbound travellers feel about England. As such, they have potential to encourage or discourage visitors.

Travel Trade – SWOT

Strengths

- History & Heritage are key interests
- The chance to experience local culture & lifestyle
- Scenery & countryside – hotels in the hinterland
- Interest in rural England and the English way of life
- Personalisation is a growing trend

Weaknesses

- London dominates as a destination
- Lack of awareness beyond London, esp. North
- 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
- 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.)

"London is both a blessing and a curse" US operator

Opportunities

- Brexit – short term opportunity (favourable exchange rate)
- Millennials – time poor and happy to be 'packaged'
- Culinary experiences – offering distinctly English food
- Offer distinctive accommodation (i.e. castles)
- 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

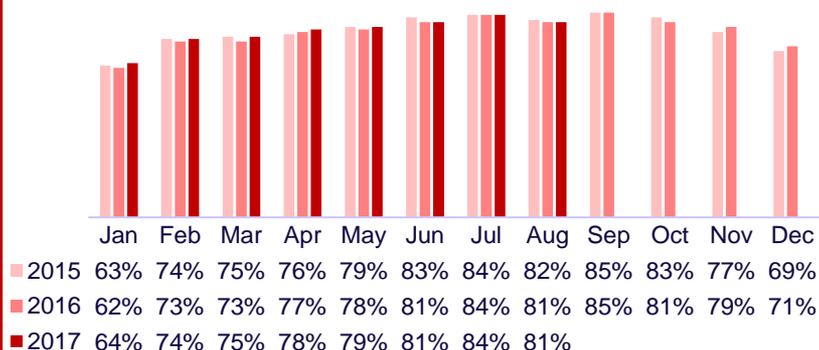
- Unwilling to promote a product with unproven demand
- Midlands and North seen as difficult to sell
- Past bad experience of trying to sell Central and Northern England
- London and the South dominate - good for some Historic Cities but not for others
- Good transport is required with regional access

"The northern areas of England are beautiful and have a lot to offer. The problem is that there is no consumer marketing and no help to provide inspiration to potential visitors".

Accommodation is seen as a barrier for development of England's tourism by the Travel Trade

Overall Availability & Capacity

Occupancy data shows England running at 81% - 85% capacity over the summer months, leaving little opportunity for additional bookings and supporting the Travel Trade concerns around availability in Peak season.



Bed space occupancy (typically at 60% or less) suggest some scope for increasing group size (family/couples), but perhaps also reflect the Travel Trade view that there is a lack of flexible/twin rooms.

Travel trade say there is a lack of willingness from many hotels to provide fixed rates and allocations more than 6 months in advance.

Availability & Capacity by type and location

Highest August occupancy areas:

Yorkshire & Humberside 79%
North West 80%

Although the Travel Trade tends to favour the South of England, occupancy rates are still very full around Manchester.



August occupancy highlights a challenge particularly for seaside accommodation.

The Travel Trade finds it difficult to book smaller accommodation (self-catering, B&B, small hotels etc.).

Accommodation is seen as a barrier for development of England's tourism by the Travel Trade

Travel Trade have concerns around Quality and Value of Accommodation

"Ban carpets in bathrooms, it is possibly the greatest pet hate."

Accommodation in England is perceived to be
Poor quality
Expensive
Poor service standards and welcome
Perception of food quality

"There have been programme ideas who never made it beyond the idea stage as the required accommodation was not available."

While these views may not be reflected in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England Opportunity.

Actions

The Travel Trade put forward a number of potential actions to address the accommodation concerns:

- Offer distinctive accommodation (i.e. castles)
- Building access to additional (alternative) accommodation types should both address the desire for authentic experiences and the capacity challenge
- Trade rates
- Price stability
- Release periods on room allocations
- Centralised booking mechanisms e.g. for smaller/specialised accommodation – B&B's, cottages
- Ideally more language capabilities (French & German)
- Focus on off-peak, whilst Peak capacity remains an issue

England's Transport and Accessibility cause concern in the Travel Trade

Travel Trade have concerns around transport & accessibility particularly to regional England

These concerns span all forms of transport:

- **Lack of regional flights**
- **Nervousness of left-hand-drive**
- **Rail concerns** (prices, train quality & comfort, gaps in geographic coverage)

While these views may not be reflected in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England opportunity and will not help with building traveller confidence.

Source: DEF Travel Trade Research June 2017

Actions

The "UK Rail Revolution" put forward by EuroMonitor at WTM 2017 reference of medium-term projects that have potential to improve rail travel for visitors and, importantly act as positive PR for trade and potential, travellers:

Key (Proposed) Milestones for Rail Developments in the UK



Source: Euromonitor International

Short-term actions

- Better accessible travel information for trade and travellers (routes, journey times, ticketing etc.).
- Greater language capability at gateways and key hubs.
- Integrated travel solutions focused on regional accessibility.
- Provide reasonable price options.

Source: Euromonitor 100 Cities WTM 2017

Online Travel Agents are an increasingly important part of the travel trade

- OTAs have grown over recent years and new brands and propositions have been launched. Airbnb has over 3m listings, Booking.com has nearly doubled in size since 2015. Consolidation has led to Expedia and Priceline, Orbitz Worldwide and Travelocity dominating (they control 95% of the US market).
- Most operate on global or at least multi-market platforms. Technology drives the offer; app solutions are increasingly popular.
- With an ethos of ‘making travel easier’ they are looking to incorporate a wider range of travel activities into their portfolios.

Challenges to Address

Highlighted by OTAs as issues to be resolved:

- Lack of understanding among DMOs and hotel chains in how OTAs operate.
- Reluctance of some DMOs and chain hotels to share commission with OTAs.
- Attractions do not always understand how to sell online and/or work on short lead times.
- Rail & air challenges.

Actions

Increase the amount of product bookable online.

Create better linkage between destinations e.g. multi-location tours.

Package the regional air options:

- competitive prices
- short transfer times
- provide clear info on travel times

Perceived opportunity around short, bookable trips e.g.

- 4-5 day coach trips from & back to London

The Traveller View

OTA’s play a significant role in enabling travellers to be confident with the price they are paying.

	US
I often compare prices from multiple OTA websites	79%
OTAs are a good way of finding a destination within my budget	75%
Best way of getting the lowest price	66%

% Strongly agree/agree about booking travel though OTAs

OTA’s are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low.



4. Distribution and Promotion

- Customer Booking Journey

The planning stages: There are four stages to the planning process; 60% of visitors from the US start to think about their trip more than 6 months in advance

The planning process:

There are four stages to the planning process (%):

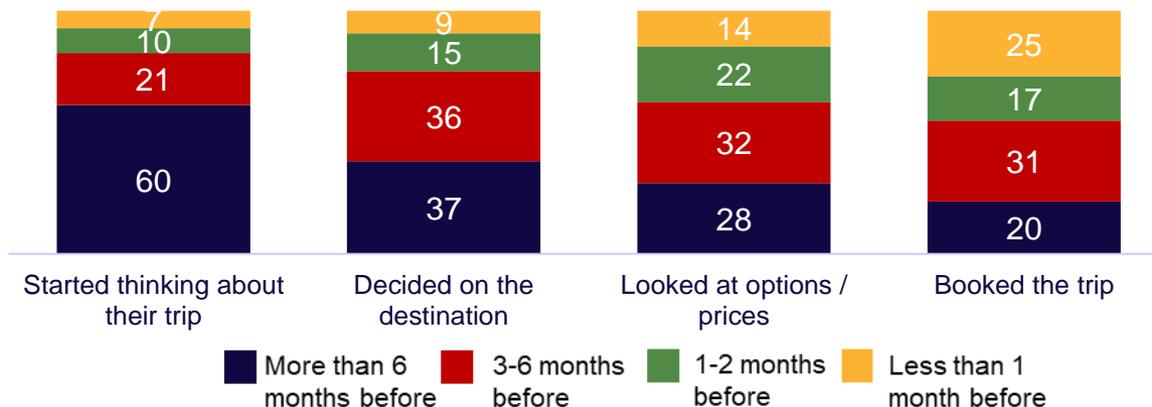


For each stage, it skews to one individual being involved – this is fairly unique to the US market.

There is definitely a gender imbalance when it comes to the final decision making, with 58% of males saying they make the final choice versus 45% of women.

Length of time for each stage (%) – US market:

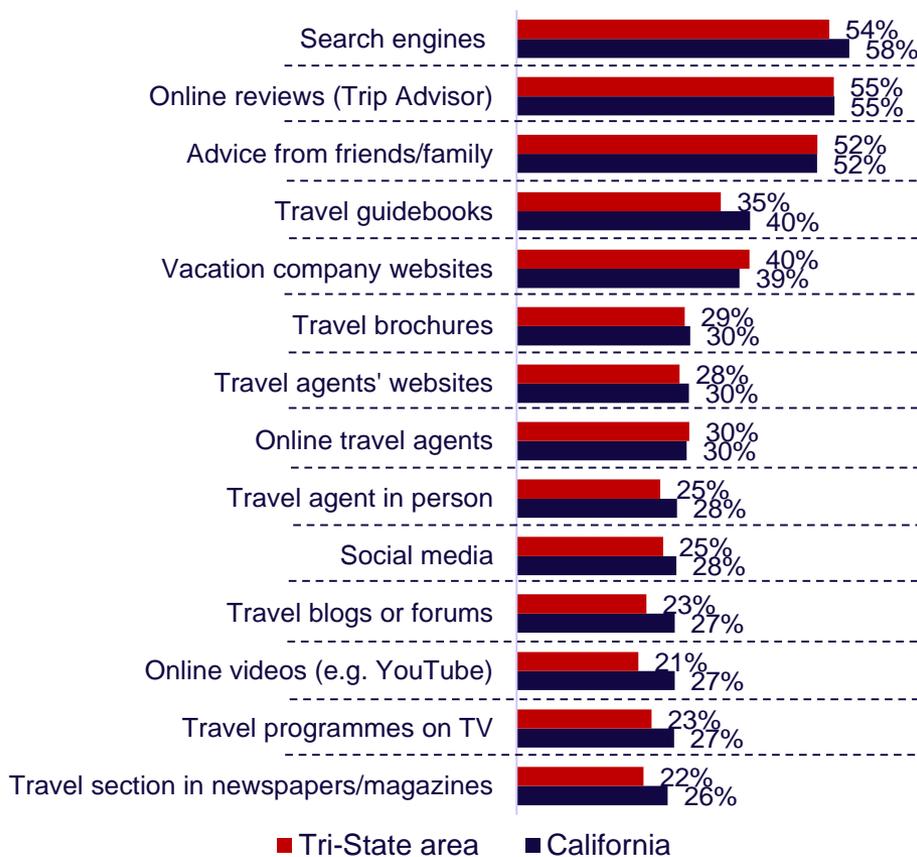
60% of visitors from the US start to think about their trip more than 6 months in advance, with most deciding on the destination more than 3 months in advance. Timing of marketing campaigns will need to reflect this.



Key influencers: Online and offline influences both play a role in helping Americans plan their vacation – online reviews and word of mouth are key

- When planning their trip, younger people are more likely to use social media, online videos, websites and blogs

Which of these do you use to help plan an international vacation?



	18-24	25-34	35-44	45-54	55-64	65+
Search engines (e.g. Google)	54%	44%	56%	61%	66%	53%
Advice from friends/family	54%	46%	48%	59%	56%	51%
Online reviews (e.g. Trip Advisor)	46%	52%	52%	62%	62%	52%
Social media	39%	43%	36%	19%	11%	5%
Vacation company websites	37%	44%	41%	37%	38%	40%
Online videos (e.g. YouTube)	32%	31%	34%	21%	14%	8%
Travel agents' websites	31%	47%	39%	20%	17%	13%
Travel blogs or forums	29%	25%	30%	25%	21%	15%
Online travel agents	29%	46%	35%	24%	19%	19%
Travel brochures	28%	24%	29%	28%	33%	41%
Travel guidebooks	28%	34%	39%	36%	44%	49%
Travel agent in person	21%	32%	34%	20%	21%	29%
Travel programmes on TV	16%	26%	28%	24%	30%	25%
Travel section in newspapers/magazines	14%	19%	22%	22%	35%	38%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in associations

Different sources are used throughout the decision making process – Word of mouth is most influential when deciding on the destination but tourism boards’ sites play an important role when deciding what to do at the destination

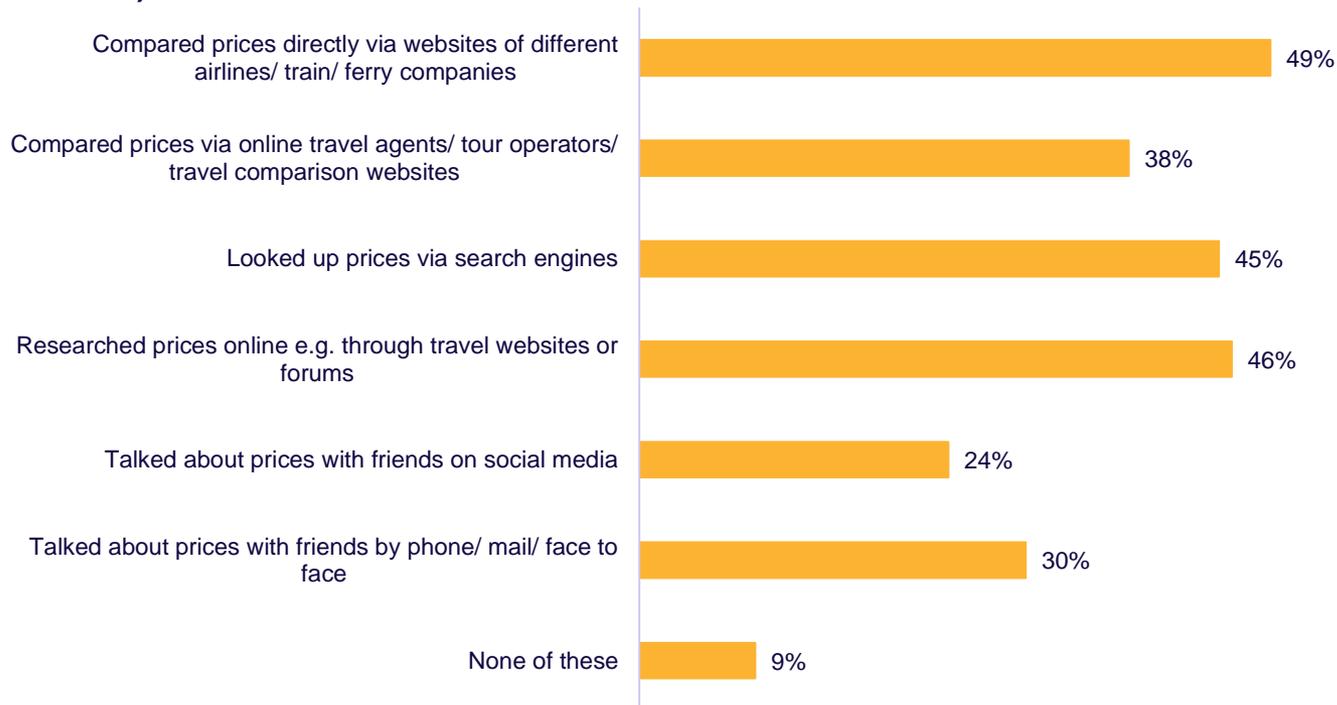
US only	STAGE 1: INSPIRATION – Things that might inspire you or give you ideas before you have decided which country/ies to visit	STAGE 2: MAKING THE DECISION – Deciding on a destination or series of destinations for your journey	STAGE 3: MAKING THE ‘BIG’ BOOKINGS - Booking flights/transport and accommodation	STAGE 4: MAKING THE ITINERARY - Giving you ideas and helping you plan and book the things to do while you are there	STAGE 5: DAILY INSPIRATION AND SUPPORT ON THE TRIP - Giving you ideas or helping you get the most while you are on your holiday
Friends, family and colleagues I know	56%	53%	34%	45%	47%
Online reviews (e.g. Tripadvisor)	36%	42%	38%	40%	37%
Specific websites (e.g. airline sites, hotel sites, train sites).	34%	39%	59%	36%	29%
All-in-one travel websites (e.g. Expedia, MakemyTrip)	25%	31%	51%	27%	18%
Movies, books, magazines, television shows	24%	14%	8%	12%	13%
Tourism board sites or resource centres	23%	24%	18%	33%	35%
Online travel blogs/vlogs	20%	19%	14%	22%	22%
Brochures, leaflets or books like Top Ten, Lonely Planet	20%	19%	13%	26%	30%
Travel agents in person or by phone	16%	21%	34%	24%	18%
Instagram or Pinterest images and amazing photos	13%	8%	4%	8%	13%
Facebook or other social or digital media posts and blogs	12%	9%	5%	10%	15%
Facebook or other social media advertising	11%	9%	6%	7%	12%
Hotel alternatives such as AirBnB	8%	9%	14%	6%	5%
Celebrity/ trusted expert endorsement	3%	5%	3%	3%	5%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in preference to these activities

Price Sensitivity and the role of Online Travel Agents

- Britain is perceived as an expensive place to visit by many. Unsurprisingly therefore 9/10 visitors do some form of price comparison before booking.
- Long-haul bookers are more active in seeking out price comparisons, perhaps reflecting the greater overall spend.

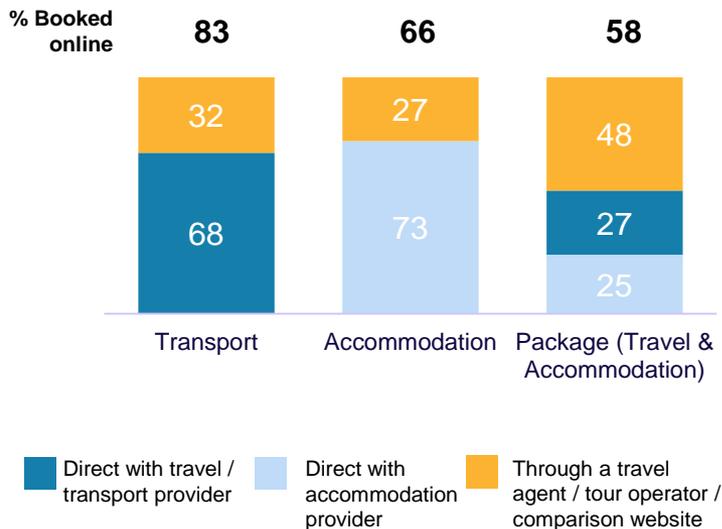
% who did this before booking a holiday to Britain (all markets)



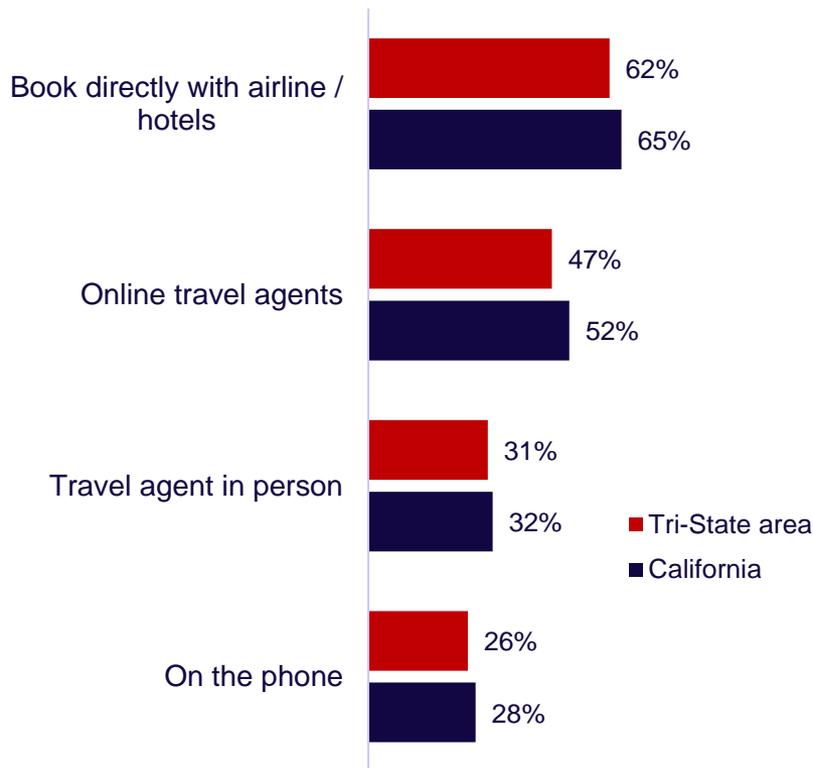
Making the booking: Travel and Accommodation are often booked separately, apart from the US where it is more likely a package

US: Channel used to book trip elements (%)

- 70% of those in the US booked their holiday to Britain as 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.

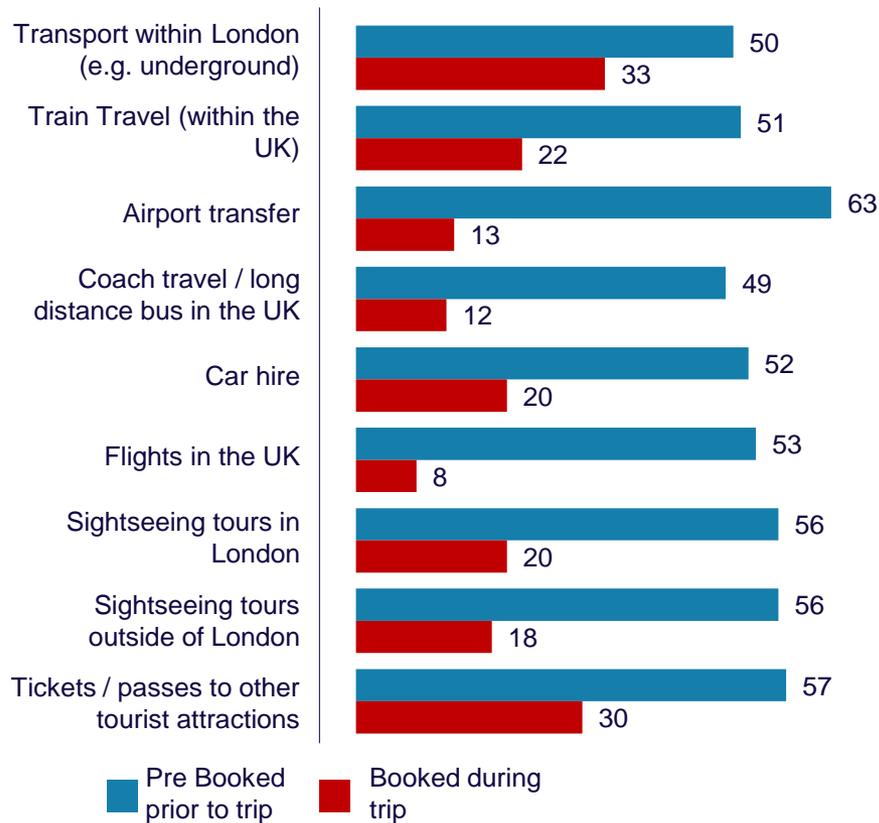


US: Channel used to book trip



The US visitor is more likely to book transport and activities in advance of their trip

US: Pre-bookable transport / activities (%)



Reaching the consumer in the US



Broadcast media

- TV (Live + DVR) reached 226 million users in 2016.
- On an average day in Q1 2016, Americans aged 18 and over watched TV for about five hours (live and DVR). Younger Americans (18 to 34 years) spent less time watching TV than those aged 50 and over, around three hours and seven hours per day respectively.



Radio

- Radio reached 240 million users in 2016.
- Americans listen to the radio for an average of 1 hour and 52 minutes each day.



Magazines

- AARP The Magazine is the world's largest-circulation magazine, with more than 47 million readers, targeting the 50+ audience. Other US magazines with a high circulation are AARP Bulletin, Better Homes And Gardens, Game Informer Magazine, Good Housekeeping, Family.

Source: Nielsen, Cision, ComScore Mobile Metrix, Alliance for Audited Media



Newspapers

- 169 million Americans read at least one newspaper each month. Readers of newspapers are relatively well educated and have a relatively high income. The digital distribution of newspapers has attracted more younger readers.
- Daily newspapers with the highest number of circulations in 2016 were USA Today, The New York Times, The Wall Street Journal, Los Angeles Times and New York Post. Newspaper circulation in print decreased in the past few years.



Online media

- The growth in digital media usage time in the past few years is driven by smartphone usage. Mobile represented about two third of digital media time spent in June 2016.
- The apps with the highest number of unique US visitors (18+, June 2016) were Facebook, Facebook Messenger, YouTube, Google Maps and Google Search. Snapchat is becoming more popular across age groups.
- The social networks with the highest number of monthly users in the US are Facebook (171 million), Instagram (77 million) and Pinterest (69 million).



VisitEngland

XV

Insight

Summary –
key take-outs



Summary: Potential Opportunities and Considerations

Getting visitors to go beyond London

- One of the biggest known challenges is getting visitors to go beyond London - the majority of visitors tend to stay in or close to the region they have entered, with London and the South dominating visits and nights stayed among US visitors. The Marketing Manchester team share the following challenges with many of the other DEF projects currently underway:
 - 1) Transportation – providing greater clarity of how to get around regional England. Consider conducting a transport audit highlighting the best routes for the Manchester Plus offer – we know those in the US would consider both train travel as well as internal flights. Car hire is also an option, however, detailed journeys must be communicated to address the nervousness around driving among some of the US audience.
 - 2) Competing with other destinations – particularly Europe and London. Those in the target demographic are more likely to consider a wider set of destinations when considering Britain but Europe is the main competitor.
 - 3) Low awareness of regional England – helping customers imagine what a holiday in Manchester and Northern England would be like is key. As part of your marketing communications both to the trade and direct with customers, it might help to compare English locations favourably with similar, well-known ‘regional’ offers in other countries.

Optimizing itineraries – Activities / Experiences

- It is a known fact that history and heritage are key drivers for visitation to England – but some US visitors also want experiences which deliver a sense of adventure and / or challenge. Something that can be delivered through the Manchester Plus offer.
- Food experiences certainly should play a supporting role. Helping visitors find unique or the best places to sample local food and drink should be considered.
- The current bus sightseeing tour fits well with the types of history and culture the American visitors would want to see. And there is certainly appetite among the target audience for guided tours rather than independent exploration. But based on reviews from TripAdvisor, it appears that there are improvements that can be made to the Manchester bus sightseeing experience. Looking at customer reviews from other successful products may help to shape the product further.
- There is a real desire to experience new and different experiences among Americans - this is not only in terms of the activities but perhaps types of accommodation in the offer.

Summary: Potential Opportunities and Considerations

Optimizing itineraries – multi-locations

- The Manchester Plus offer certainly opens up the opportunity to offer more diverse experience and activities – certainly ones that could offer a challenge / more active activities. However, the current market for multi-destination trips within England is quite small - with only 9% of inbound visitors to England across all markets taking multi-destination holidays in England.
- When thinking about itineraries, Marketing Manchester should also consider that a relatively high proportion of visits to Britain, especially among the target age group, will involve stays in other countries.
- A point on seasonality - Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period. As Marketing Manchester are positioning their product as an all-round opportunity, it should consider the seasonality that is evident among those who are taking multi-destination trips within England.
- The available research validates the importance of a partnerships both with London organisations (the majority of American visitors enter the UK through London) and other regional projects underway to support the Manchester Plus offer. In particular, those who are delivering the projects for Heritage Cities, National Parks and Walking Trails.

Gateway Arrival and Orientation

- Any marketing communication, regardless of channel, needs to drive a complete understanding of the offer. A tiered or phased approach to communication is recommended. Start with the primary reasons for visiting – exploring the city, visiting the most iconic sights and named landscapes.
- Keep communication simple:
 - Visuals of the area's attractions go a long way to speaking for themselves.
 - Avoid colloquialisms which may confuse overseas audiences.

Summary: Potential Opportunities and Considerations

Promotion and distribution: Travel Trade Perceptions

- 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 offering but there are some challenges to overcome:
 - Unwilling to promote a product with unproven demand, in particular the North is seen as difficult to sell.
 - Past bad experience of trying to sell Central and Northern England.
 - London and the South dominate.
 - Accommodation is seen as a 'fundamental' barrier - Occupancy data shows England running at 81% - 85% capacity over the summer months, leaving little opportunity for additional bookings and supporting the Travel Trade concerns around availability in Peak season.
- The Travel Trade put forward a number of potential actions to address the accommodation concerns:
 - Offer distinctive accommodation (i.e. castles).
 - Building access to additional (alternative) accommodation types should both address the desire for authentic experiences and the capacity challenge.
 - Trade rates.
 - Price stability.
 - Release periods on room allocations.
 - Centralised booking mechanisms e.g. for smaller/specialised accommodation – B&B's, cottages.
 - Focus on off-peak, whilst Peak capacity remains an issue.
- The Travel Trade have concerns around transport & accessibility particularly to regional England. These concerns span all forms of transport:
 - Lack of regional flights.
 - Nervousness of left-hand-drive.
 - Rail concerns (prices, train quality & comfort, gaps in geographic coverage).

While these views may not be reflected in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England opportunity and will not help with building traveller confidence.

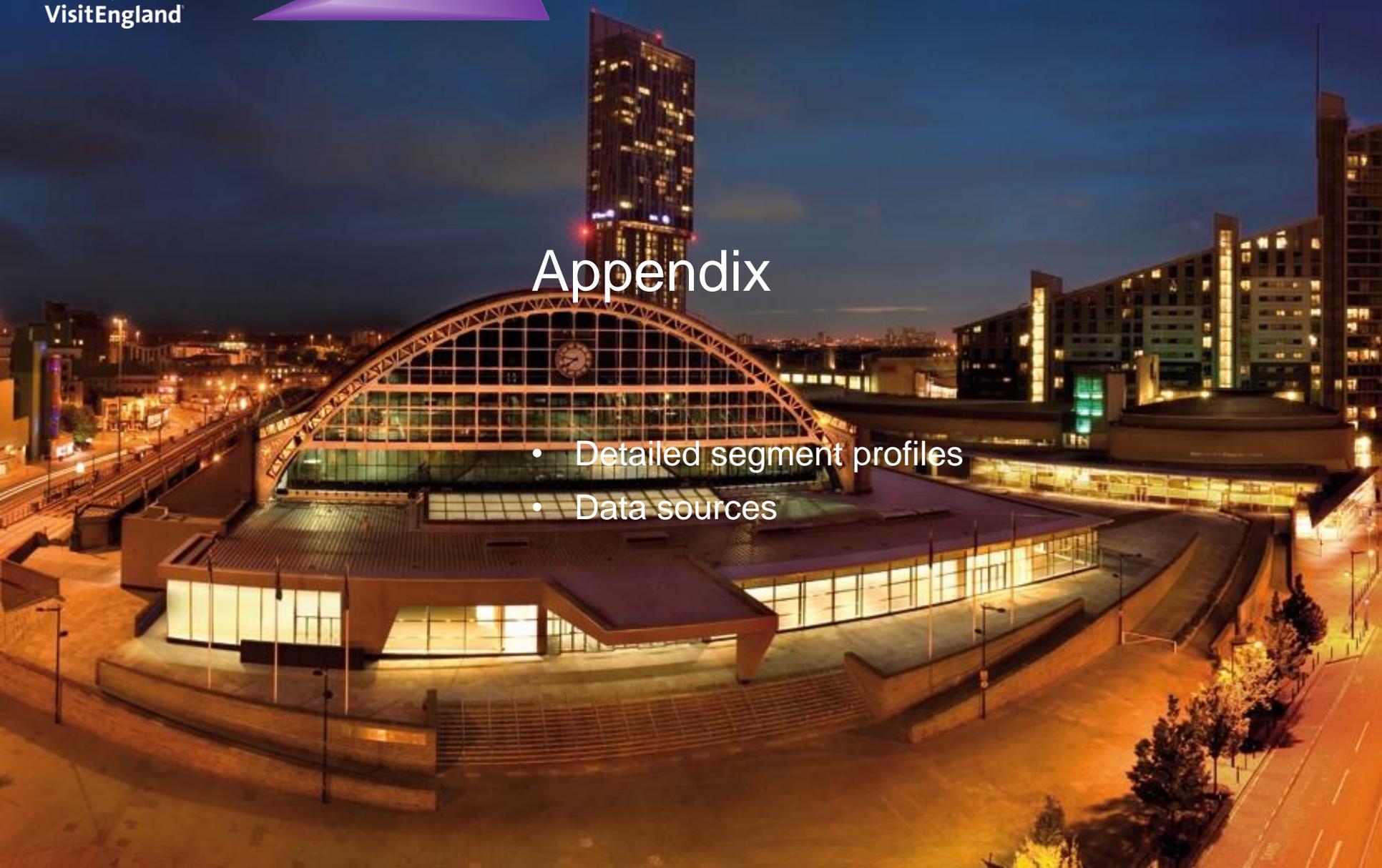
Summary: Potential Opportunities and Considerations

Promotion and distribution: Customer Booking Journey

- There are four stages to the planning process; 60% of visitors from the US start to think about their trip more than 6 months in advance, with most deciding on the destination more than 3 months in advance. Timing of marketing campaigns will need to reflect this.
- Online and offline influences both play a role in helping Americans plan their vacation – online reviews and word of mouth are key. Different sources are used throughout the decision making process – Word of mouth is most influential when deciding on the destination but tourism boards' sites play an important role when deciding what to do at the destination.
- Price Sensitivity and the role of Online Travel Agents - Britain is perceived as an expensive place to visit by many. Unsurprisingly therefore 9/10 visitors do some form of price comparison before booking. Long-haul bookers are more active in seeking out price comparisons, perhaps reflecting the greater overall spend. OTA's play a significant role in enabling travellers to be confident with the price they are paying. OTA's are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low.
- 70% of those in the US booked their holiday to Britain as part of a package – and more importantly the US visitor is more likely to book transport and activities in advance of their trip. Word of mouth and travel review sites play a big role in helping the US consumers decide on their itinerary prior to their holiday.

Appendix

- Detailed segment profiles
- Data sources



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

- 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 segment. They are **Buzzseekers** and **Culture Buffs** (see next slides for profiles).

	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"> • Potentially – but older age group 	<ul style="list-style-type: none"> • Core Target 	<ul style="list-style-type: none"> • Core Target

CULTURE BUFFS

AGE

- 25yrs-54yrs (average 37)
- 18-24 (21%); 25-34 (26%); 35-44 (21%); 45-54 (23%); 55+ (9%)

KEY MARKETS

- China

GENDER

- 57% Female

DEFINING ATTITUDES

- Care about the image portrayed to others
- Like to see travel as a reward for their hard work
- Demand to see the world's leading sites

FAVOURITE TRAVEL ACTIVITIES

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)

- World class food and drink
- Theme parks, zoos, day outings

GB LIKELY ACCOMMODATION (unique vs others segments)

- Mainstream hotels and bed and breakfast

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- More likely to travel in medium sized group
- Typically families (41%)



WHO ARE THEY?

Image and brand conscious, these individuals are concerned with how others see them, so travelling can fulfil this status kudos, particularly in how they travel and what they do abroad, as they still like to choose well known, safe tourist destinations for their travel needs.

BUZZSEEKERS

AGE

- **Most (64%) 18-34yrs**
18-24 (36%); 25-34 (28%);
35-44 (17%); 45-54 (10%); 55+ (9%)

KEY MARKETS

- India, France, Germany,
Netherlands Australia, USA

GENDER

- 56% Male

DEFINING ATTITUDES

- Seeking out new experiences
- Always looking for new things to do with one's time
- Taking holidays full of action & excitement
- Happy to pay more for once-in-a-lifetime experiences
- See themselves as trendsetters and more popular than others

FAVOURITE TRAVEL ACTIVITIES

- Visiting famous places/iconic sites
- Trying local food & drink specialties

UNIQUE TRAVEL ACTIVITIES (versus other segments, but still niche)

- Challenge or action-filled activities
- Hands-on learning activities

GB LIKELY ACCOMMODATION (unique vs others segments)

- Someone else's home (e.g. Airbnb)
- Tent or caravan
- Alternative accommodation

TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Trusted/famous endorsers influential
- Mobile device natives
- Leave plenty of room for spontaneity



WHO ARE THEY?

Free spirited, spontaneous, Buzzseekers are living in the moment and always looking to make the most of their time. Constantly fueled by the desire for 'more', they are constantly on the search for new ideas, looking to meet new people and engage in new activities that will challenge them, providing fun and a sense of individual growth.

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

- <https://www.visitbritain.org/inbound-research-insights>
- IPS (International Passenger Survey)
 - <https://www.visitbritain.org/about-international-passenger-survey>
- Discover England Fund Destination Summaries - Manchester
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def_manchester_summary_06.11.17.pdf
- VisitBritain Decisions & Influences Research, 2016
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/visit_britain_decisions_and_influences_report_final_07.04.17.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/holiday_bookingv3.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_150_-_researching_and_planning.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_151_-_ipsos_booking_final.pdf
- VisitBritain Food & Drink Research, 2017
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_146_-_how_the_world_views_britains_food.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/food_drink_research_summary_v3.pdf
- Discover England Fund Travel Trade Research, 2016
 - https://trade.visitbritain.com/wp-content/uploads/2017/07/discover_england_initial_summary_report_v7_140817.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def_travel_trade_research_-_final_report_22_june_2017_v2.pdf
- Discover England Fund Activities & Themes Research, 2017
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_initial_summary_report_v6_310816.pdf
- IPS via Discover England Fund 'England's Gateways' report, 2017:
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_regional_gateways_reportv4.pdf
- Inbound consumer sentiment research
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research.pdf
- Optimising the Discover England Fund Application through Insight
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/visit_england_final_deck_240317-for_publishing.pdf
- Discover England: summary insights on overseas visitors to England's regions (multi-destinations)
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_multi-destination_v2.pdf
- The Future Travel Journey
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/the_future_travel_journey_toolkit_final.pdf
- Discover England: summary insights on overseas visitors to England's regions
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_initial_summary_report_v7_140817.pdf
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_activities_reportv5.pdf
- Visit England International Omnibus, 2013
- VisitBritain Beyond London, 2013
 - <https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/2013-7-%20%E2%80%98Beyond%20London%E2%80%99%20Research.pdf>
- IPS via VisitBritain: Types of Transport used while visiting Britain, 2013
 - <https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/2014-6%20Types%20of%20transport%20used%20by%20visitors%20to%20Britain.pdf>
- Discover England Fund – Activities & Themes Research 2017
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/ve_market_activity_summaries_090817.pdf
- VisitBritain Market and Trade Profile USA
 - <https://www.visitbritain.org/markets>
- Technology and Social Media, 2016
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_152_-_tech_and_social_media.pdf
- England Occupancy Survey August 2017
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/eos_august_2017_final.pdf



VisitEngland

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Insight

