



VisitEngland™

# Discover England Fund Research Summary Report The Waterways of England

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.



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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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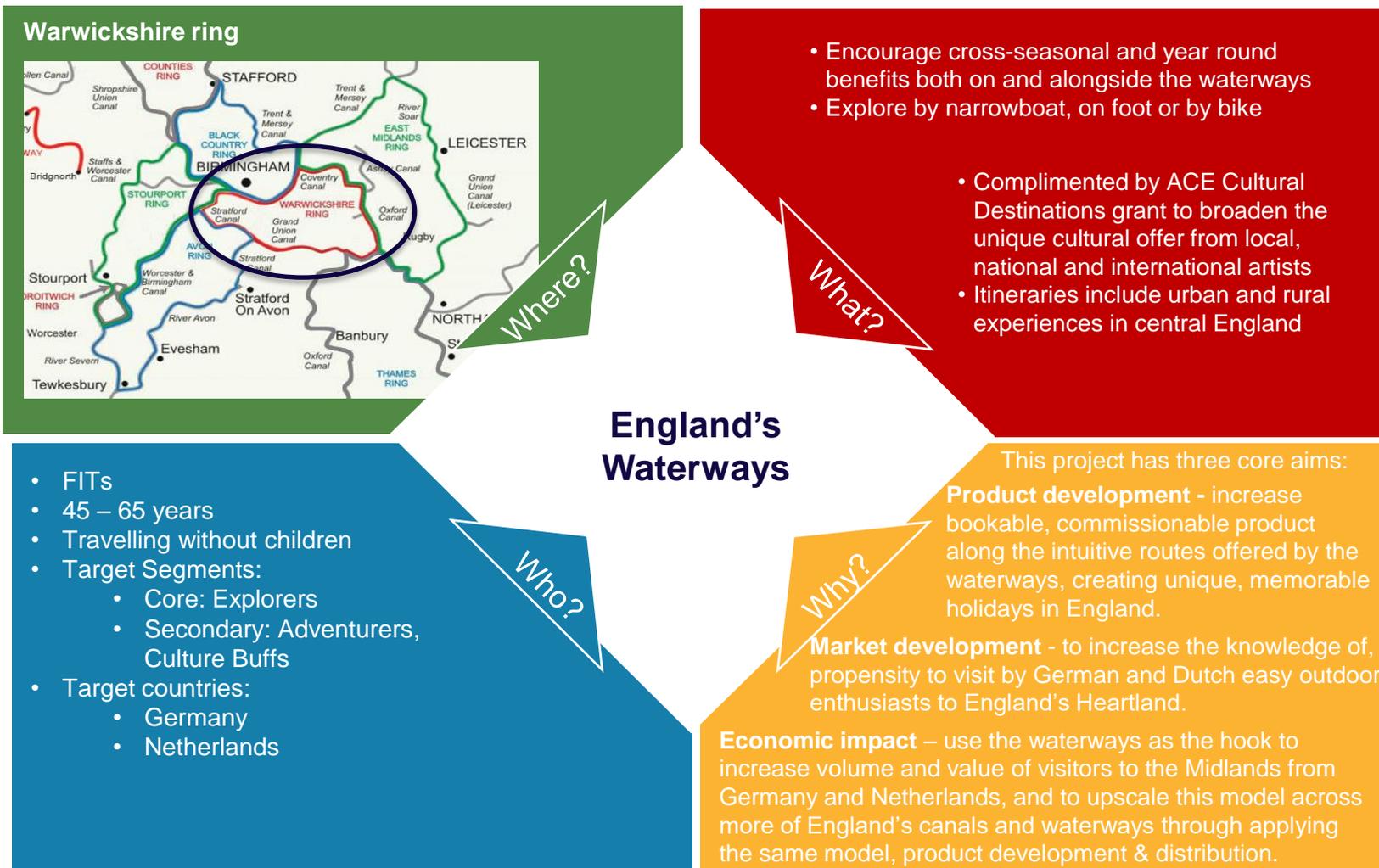
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Insight

# Introduction



# Project overview



## Key Messages and areas of focus

### Proposition

- England's waterways are alternately scenic, enthralling and beautiful but they also tell the story of this historic land linking vibrant towns and cities with glorious English countryside and rural life. They remain a miracle of industrial-age engineering.
- Based on the rings and rivers of the Midlands, visitors will delight in the waterways as a companion as they walk, their means of accommodation and transport or the winding backdrop to their holiday journey; not just looking at, but immersed in, this unique heritage of England's past, treating visitors to a secret way through the back door of real English life.
- This is a holiday for people who love England, who are drawn to special places, who enjoy the regenerative experience of the countryside and wildlife and who value the particularly English culture and ambience of time in traditional towns and energetic cities. The waterways offer easy route-finding by boat, on foot or in the car, and give visitors ample time together to relax, interspersed with the memorable moments that bring their holiday recollections alive.

### Areas of Focus for this report

- The project extends beyond boating experiences to holidays and tours that are linked to the waterways, either on foot or by car.
- Interest therefore is in the mix of experiences and activities that would be best suited to the core theme.
- The focus is on Fully Independent Travellers (FITs).
- The initial focus is on the Warwickshire Ring.
- Travellers are expected to enter England via Birmingham or East Midlands airport.
- Three example itineraries are provided that cover:
  - Both German and Dutch travellers
  - A range of durations from 7 to 14 nights
  - A variety of transport modes – boat, foot & car
  - A range of different types of experience, accommodation & food
  - Include both urban and rural destinations
  - A range of price points



***A unique perspective on everyday life and culture in England***



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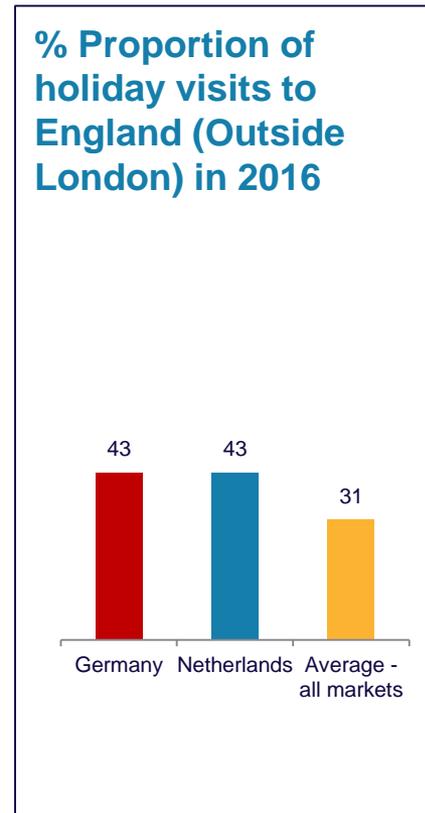
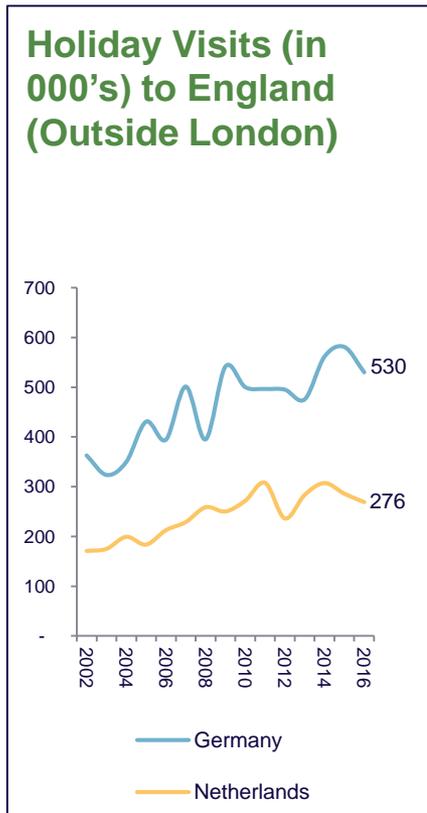
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Current Trends



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

- Less than a third of all trips to England overall made by overseas visitors now involve a stay outside of London, however visitors from Germany and the Netherlands are more likely to visit regional England.



- Whilst volumes fell in target countries in 2016, there are some overall signs of growth again in 2017.
- Germany:** Visitor numbers and duration of stay inbound from Germany have dropped in 2016.
- Netherlands:** Visits and duration have both declined.
- Visitors from both target markets are more likely than average to travel beyond London.

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

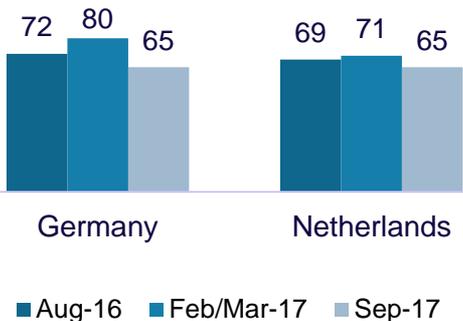
## Geopolitics: Safety / Security

“The Performance of the travel industry in Europe has been hampered by several events in recent years, including the Eurozone crisis, Brexit, the migrant crisis and terrorist attacks in a number of countries. All these developments lead to uncertainty in their own way”.

*Euromonitor Travel Landscape from Top 100 Cities November 2017*

Safety and security are therefore important traveller considerations, with rural destinations likely to continue to be seen as safe choices among those with concerns.

### Britain: Safe & Secure destination (%)

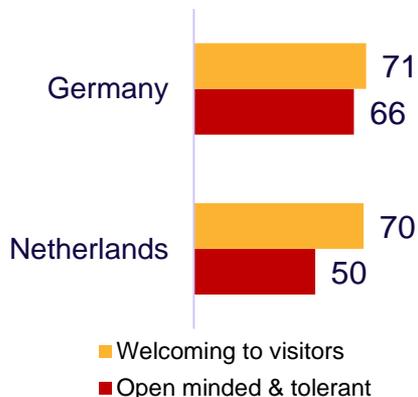


## Perceptions of Britain

Potential impact both positive and negative:

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

### Perceptions of Britain (%)

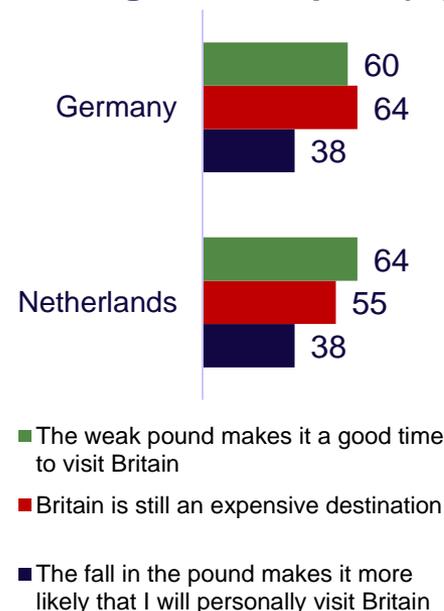


## Exchange Rate

Initial movement post-Brexit vote appears to have ‘reset’ the value of the pound.

- Makes England a better value destination.
- A positive while exchange rates stay at this level and reasonably stable.

### Exchange Rate Impact (%)



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

## Competitive Environment

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

### 1. Competitor Destinations

Main competitor destination by country when considering visit to Britain:

- Germany – Ireland, France
- Netherlands – France, Spain

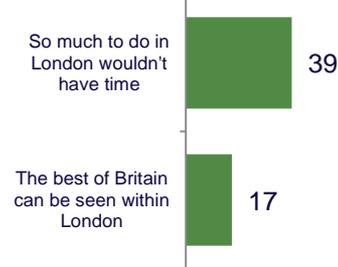
#### Reasons for not going beyond London (%)\*



### 2. Dominance of London

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

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



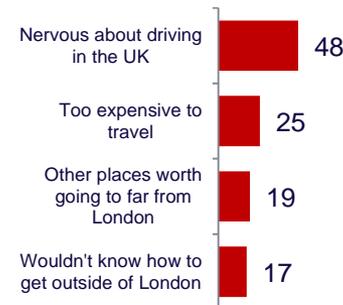
## Growing inbound travel to England’s regions

- Alleviating transport concerns and growing awareness of Britain outside London are key challenges.

### 1. Address Transport concerns

- Promoting our safe road record and train network outside of London is key.
- Providing clarity around journey planning.

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



### 2. Promoting regional England

- Awareness of destinations and activities / products across our regions is a major barrier.

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



\* Data is all visitors to England who only visited London

# Visitors to England are not aware of the attractions outside of London

## 4 main themes in the barriers to travelling beyond London:



### Implications

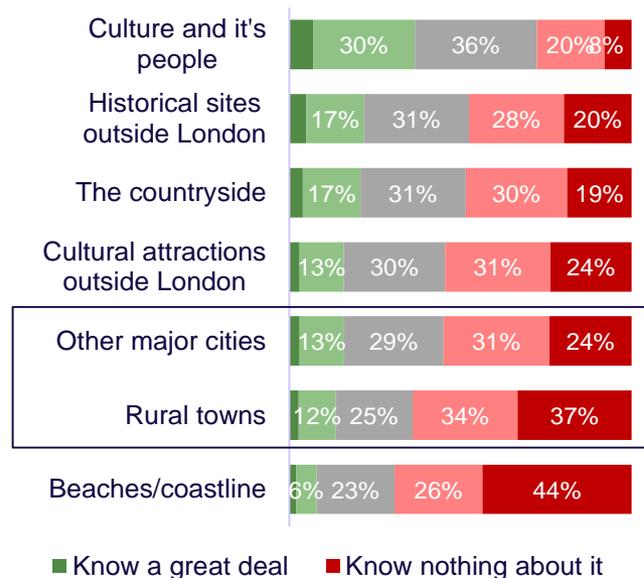
- Almost all these barriers can be addressed through strong communication of the offer beyond London in particular promotion of rural towns (and other cities) on the waterways routes.

The level of knowledge is low for attractions and destinations beyond London.

The greater perceived knowledge of the culture and people is interesting, as perhaps they don't know what they don't know (rural communities, crafts & trades).

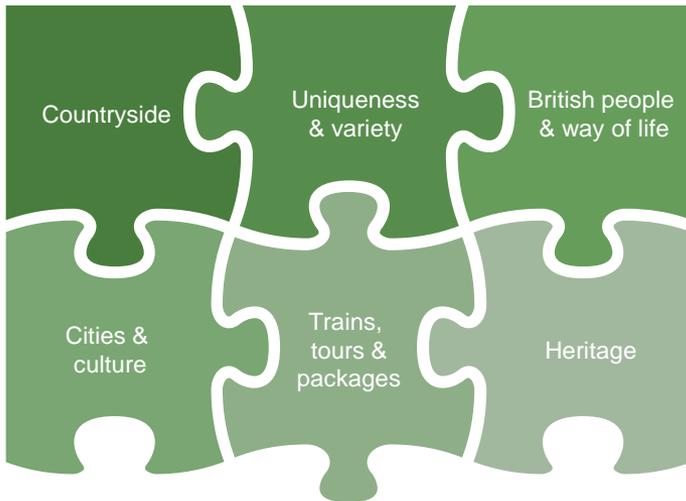


## What do you know about Britain outside of London?



# However, the triggers to travel beyond London tie in well with themes included within England's Waterways

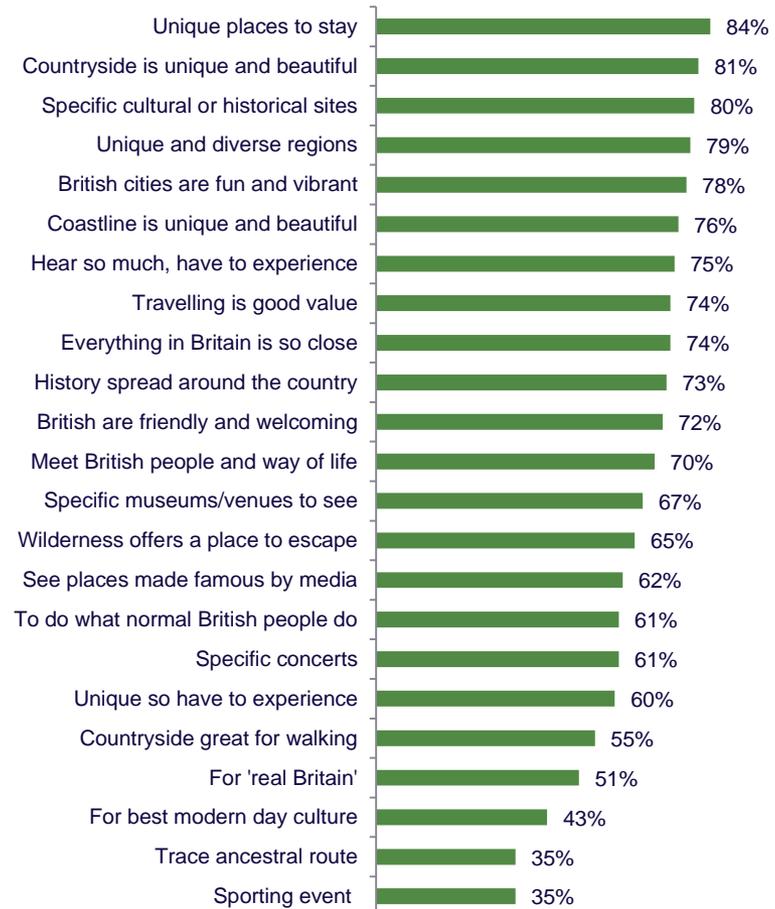
## Triggers to go beyond London



### Implications

- Main reasons to travel beyond London are ones that England's Waterways can capture in the itineraries being developed.
- Working with destinations, accommodation and particularly travel to provide good value for money will be important.
- Authenticity and 'real England' are persuasive stories for non-visitors.

## Aspects which would persuade recent 'London only' visitors to go beyond London





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How to optimise England's  
Waterways Opportunity

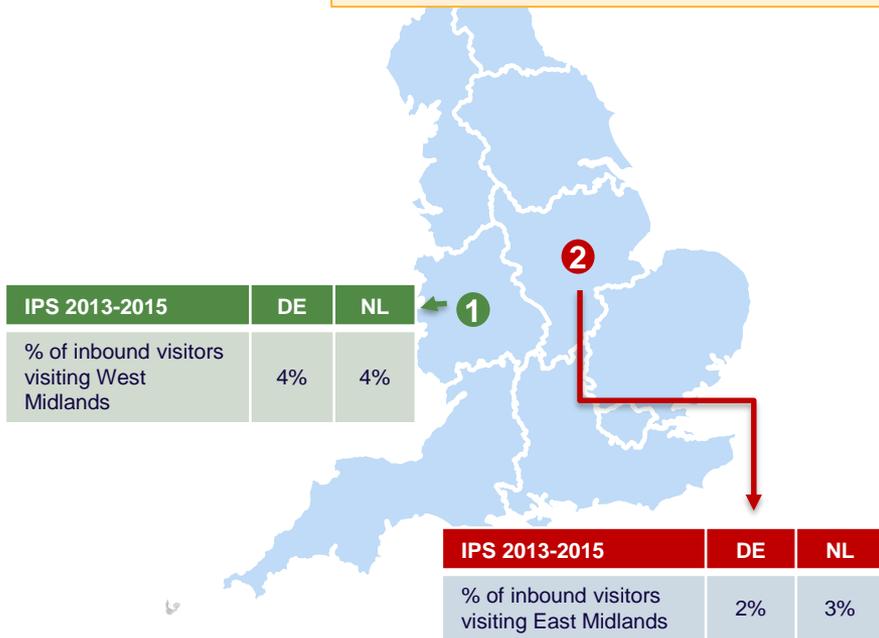
**Visitors to the Midlands**

# Two challenges for the project team: 1. Encouraging more visitors to central England and 2. Encouraging visitors to stay longer

## Inbound visits to England's regions

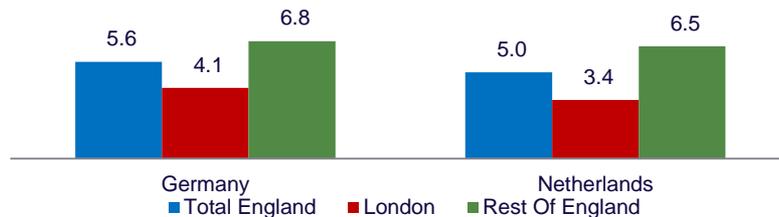
### Implications:

- The primary challenge is to get visitors to the Midlands. Currently the South has the highest share of visitors.
- The Midlands will require strong communications and a differentiated product to encourage visits.

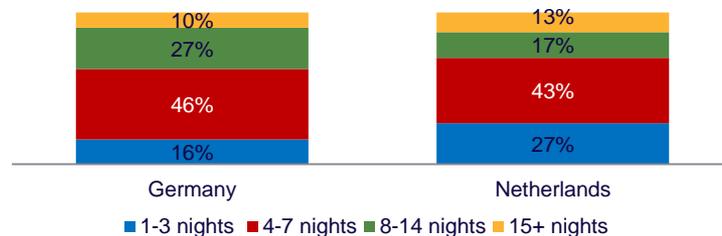


Source: Discover England Fund Activities & Themes Research, 2017

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



## Duration of stay in England (2015)



### Considerations:

- Currently most German and Dutch travellers stay a week or less.
- Over a quarter of Dutch visitor only stay 1-3 nights.
- However, those who visit England outside of London do stay longer.
- The example itineraries are 7 and 14 nights. This is longer than the current average stay and so activity will be needed to encourage longer stays in England.
- Alternative shorter itineraries should also be made available for those unable to stay longer.

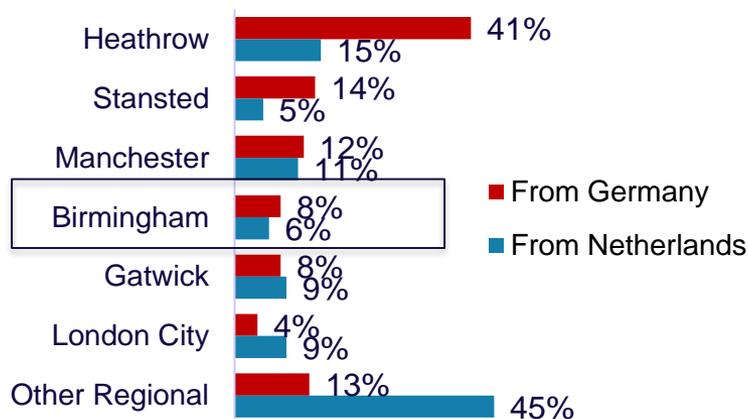
Source: IPS via Discover England: summary insights on overseas visitors to England's regions 2016

# Currently regional gateways do not attract large numbers of holidaymakers outside of the South of England

- The majority of visitors to England enter through London or the South East – and tend to stay near that gateway region.
- Around ¼ of German and Dutch visitors come to Britain via sea ports and are therefore a long way from central England on arrival

## Destination airport annual seat capacity 2016

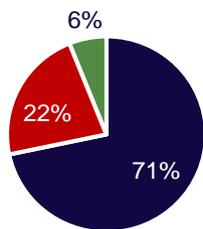
Visitors from Netherlands have a much wider spread of regional airports. For both markets, Birmingham is currently a low proportion of annual seat capacity.



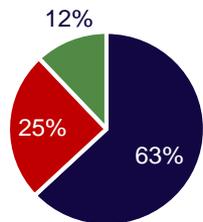
### Mode of Entry (all UK Visitors)

■ Air ■ Sea ■ Tunnel

#### Germany



#### Netherlands



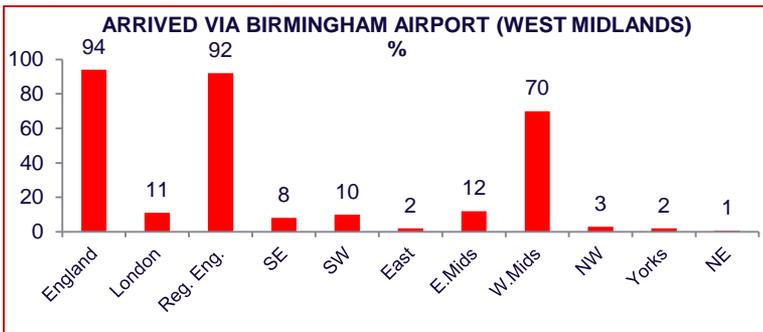
Source: Apex Rdc 2016: Non-stop flights only

### Considerations

- Overseas visitors to the Midlands use Birmingham International airport (higher for business use than for holidays); use of East Midlands airport is extremely low. Itinerary suggestions/plans should take this in to account.
- Currently a higher proportion of Germans use Birmingham International airport than the Dutch. Airlines have good capacity for this route; flights to East Midlands airport are minimal.

# Visitors who use Birmingham airport tend to stay in the region

## Regions stayed in by UK holiday visitors



- 70% of those who use Birmingham International airport stayed in the West Midlands region, and 54% did not visit any other regions in England during their stay.
- Overseas visitors use Birmingham as a gateway all year through, but visits are more concentrated in the summer and 'shoulder' season.
- Birmingham is the most visited place in the Midlands, followed by Stratford-Upon-Avon with its Shakespeare connection.
- With Coventry awarded the 2021 City of Culture, there should be further interest generated in visiting the region.



## Most Visited Destinations in West Midlands

2015 holiday visitors only

|                            |                |
|----------------------------|----------------|
| <b>Birmingham</b>          | <b>180,000</b> |
| <b>Stratford-Upon-Avon</b> | <b>61,000</b>  |
| <b>Nottingham</b>          | <b>38,000</b>  |
| <b>Leicester</b>           | <b>35,000</b>  |
| <b>Coventry</b>            | <b>27,000</b>  |



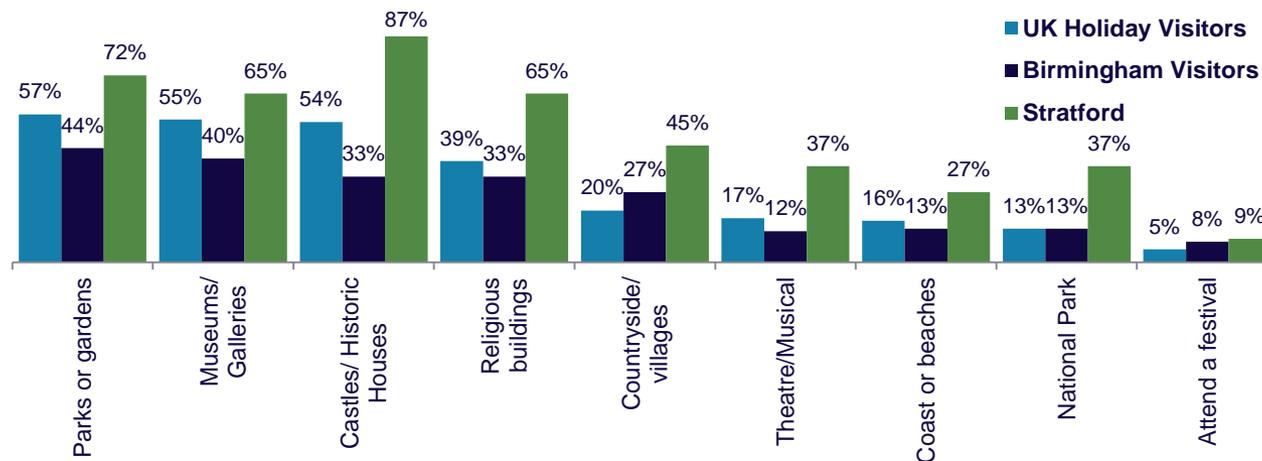
# Deep Dive into visitors to Birmingham and Stratford – relevant to Warwickshire Ring – Waterways by Narrowboat itinerary

## Visits, Spend and Nights to Birmingham and Stratford 3 year average for 2014-16

Visitor volumes to Birmingham are much higher than to Stratford, but the vast majority of those visits are for business or visiting friends and relatives. In contrast, half of visitors to Stratford are on holiday.

| Visits (000s)  |            |           | Spend (£m)     |            |           | Nights (m)     |            |           |
|----------------|------------|-----------|----------------|------------|-----------|----------------|------------|-----------|
|                | Birmingham | Stratford |                | Birmingham | Stratford |                | Birmingham | Stratford |
| <b>Total</b>   | 1,055      | 123       | <b>Total</b>   | 349        | 43        | <b>Total</b>   | 5.9        | 0.6       |
| <b>Holiday</b> | 166        | 62        | <b>Holiday</b> | 64         | 22        | <b>Holiday</b> | 0.8        | 0.3       |

### Activities conducted by holiday visitors to Birmingham



Visitors to Stratford tend to be engaged with the Shakespeare history as well as the wider countryside and landscape.

Whilst the Warwickshire Ring does not specifically include Stratford, consideration should be given to the type of activities currently enjoyed by visitors to the region.



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# How to optimise England's Waterways Opportunity

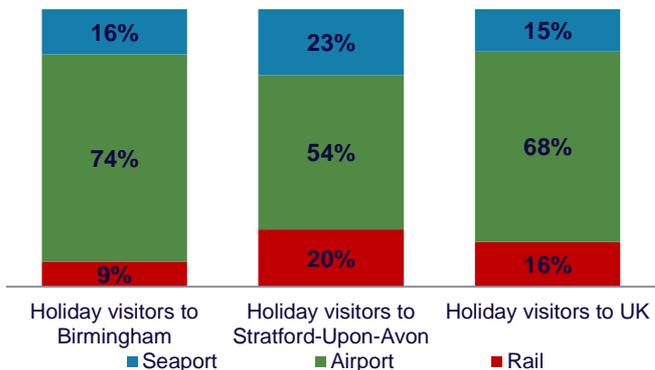
## Transport

# Travel and destinations: Holiday visitors generally fly, but many arrive in London. Stratford has a wider seasonal spread of visitors

Airport is the most common arrival mode for holiday visitors to Birmingham.

However, around 1 in 4 arrive via London (1 in 3 for Stratford), so whilst the airports are the focus gateways there is opportunity for visitors inbound to London. Good rail connections to the West Midlands, provide an alternative start point for itineraries (Birmingham New Street, Coventry, Leamington, Warwick etc. all have good rail services from central London).

Mode of Travel

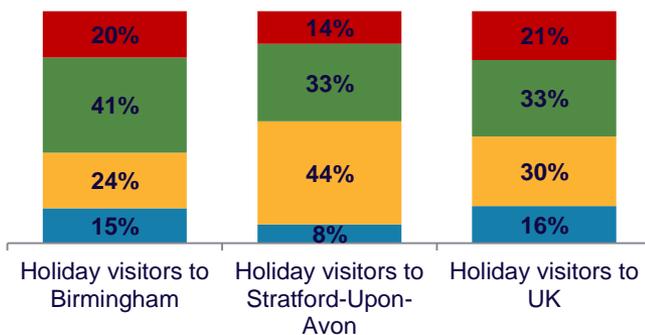


Top 5 Gateway Regions to Birmingham and Stratford-Upon-Avon (Top 5)



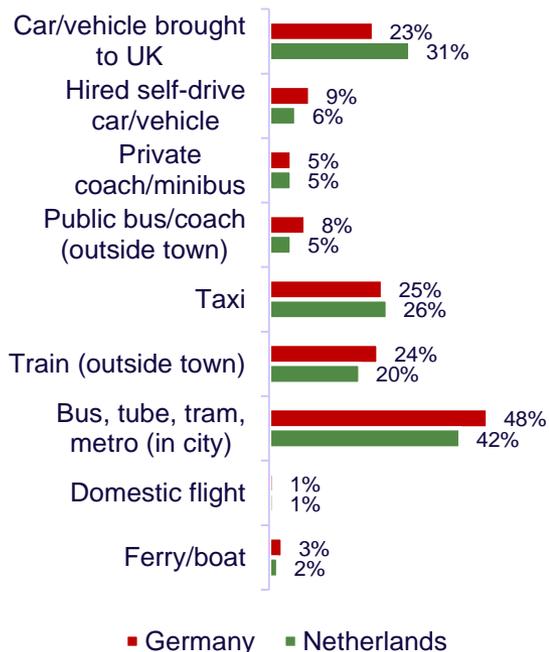
Seasonality

- Oct-Dec
- Jul-Sep
- Apr-Jun
- Jan-Mar



# Use of public transport is high and will allow visitors to access the Midlands easily. Both Germans and Dutch are also willing to self-drive

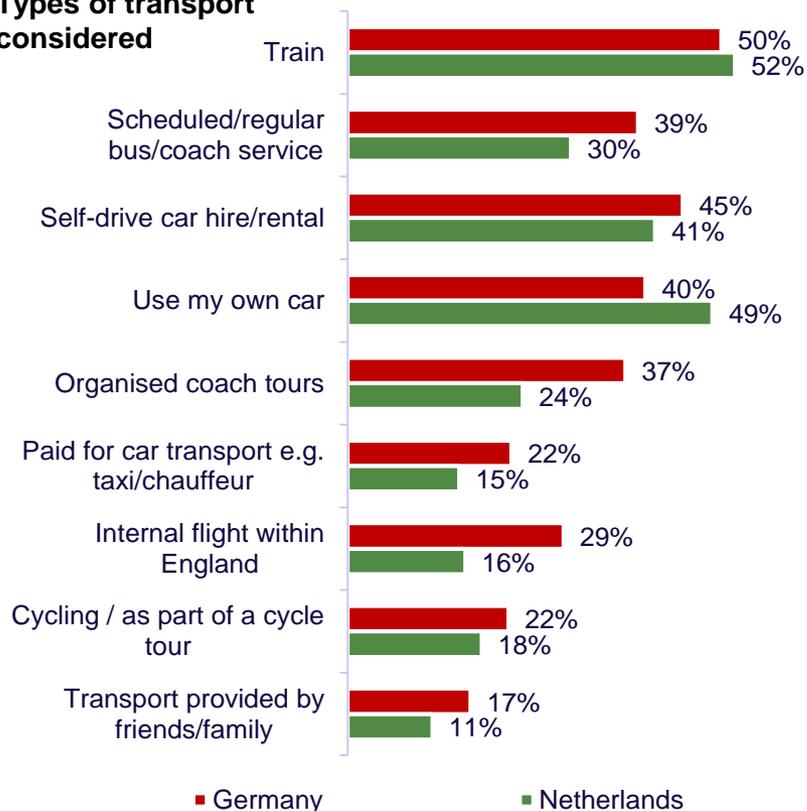
## Modes of Internal Travel used in last visit to UK (all visitors)



- The Dutch were most likely to bring their own transport with them.
- Car hire, taxis and private coaches further increased the proportion travelling by road in 'personal' transport.
- Public Transport was used by around a quarter of visitors from Germany but is lower for Netherlands.

- Public transport is widely considered, however car hire is also popular, the latter slightly higher among German travellers.
- Consideration of trains is high in both markets; Birmingham is easily reached by train and fits with England's Waterways suggested transport options.

## Types of transport considered



A black metal arch bridge spans a canal. The bridge has a circular emblem with the number "1837" and the text "BRITANNIA - FOUNDRY - DERRY" below it. In the background, there are brick buildings. Two people are standing on a small platform near the bridge's base. The water in the canal reflects the bridge and buildings.

# Enhancing the England's Waterways Experience

## Themes and Activities

# Concept testing demonstrates the appeal of the proposition and opinions are generally consistent across both Germany and Netherlands



## Great British Boating

We love holidays where we can relax together in the countryside, but that also offer a little bit of adventure, and a little bit of culture – it gives us something to tell our friends about!

Great British Boating is a self-skipped canal cruise on one of the charming waterways of England. This gentle adventure allows you to drink in the beautiful English countryside, feel the quiet rural charm and let nature's treasures seep into your psyche.

The trip provides a unique perspective on the hidden English countryside, its historic houses and gardens, its culture and heritage. These waterways have long been central to the lives of food and drink producers, music makers, craft creators and the cultural heart of English cities. Following them you will become a part of the community, working the locks, steering the narrowboat, stopping by a grassy bank for your lunch, and enjoying a traditional drink in a waterside pub with your dinner. Harking back to a relaxed pace of life, there will be plenty of time to read, chat, birdwatch and eat cake together, creating experiences your friends will want to hear all about!

Great British Boating: curate your own tour of the English countryside on its hidden waterways

### Positive take-outs

- Unique
- Visit places you couldn't previously
- See the real England
- Associations of peace, relaxation, freedom and culture

Boating in combination with culture

So I can escape away from society and everyday life

### Concerns

- Ease of getting around
- Stressful to organise

Quite short distance, possibly difficult to organize, accommodation possibilities?

Too monotonous

Exact schedule, little flexibility

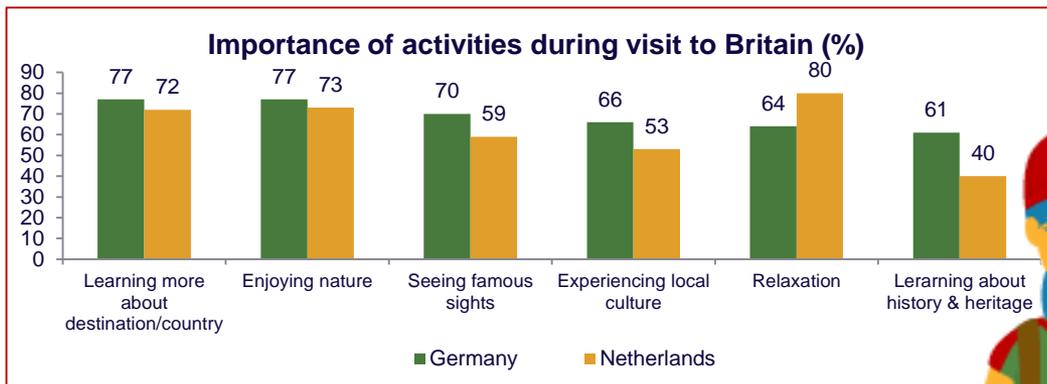
It does not seem to me to be the most interesting corner of Great Britain

### Implications

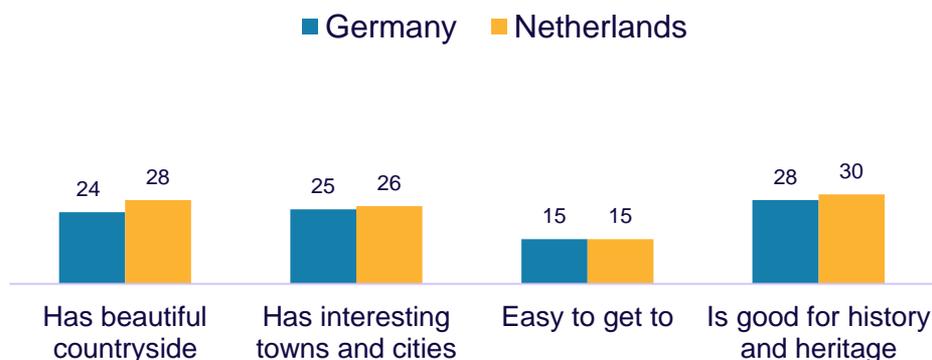
- Consistency of response from the two focus countries enables consistency of positioning and marketing
- Concerns around ease of getting around and stress of organising can be addressed through itinerary planning and the way in which they are communicated through the trade. Clear information on transport options (timing and cost) as shown in the example itineraries should be built on with timetables, car hire locations etc. as appropriate

## One in 10 express interest in visiting the Midlands. Perceptions of what to expect are similar among Dutch and Germans

- Visitors to Britain participate in a wide range of leisure activities.
- Relaxation is most important to the Dutch, while the Germans want to learn more about the country and enjoy the natural world.
- This may be addressed through the way in which itineraries are communicated rather than a need to have market specific itineraries



### Agreement with statements about The Midlands



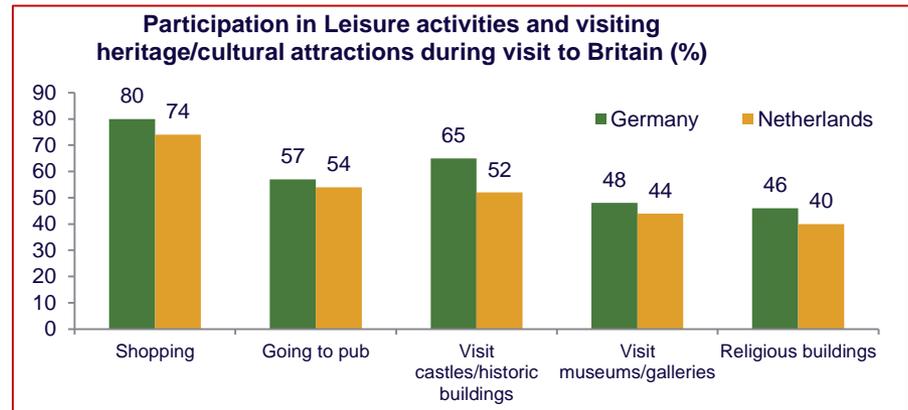
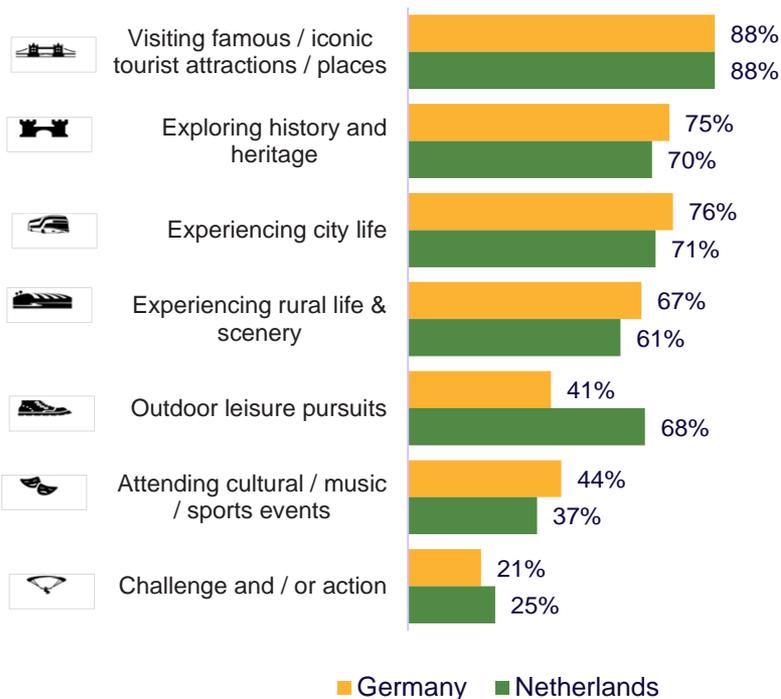
- There is only limited understanding of what to expect in the Midlands. The history and heritage is quite strong, however it may be that this is driven by a few key themes such as Shakespeare.
- There is opportunity through this project to introduce a wider variety of Midlands towns, their history and heritage through varied itineraries

# Activities and themes research gives direction for focus areas for potential itineraries that will have wide appeal

Famous tourist attractions have the widest appeal across both countries and are likely to be important focal points for both pre-set and individualised itineraries. Exploring history and heritage have strong interest in both countries, which works well for a Midlands-based holiday.

The Dutch are more interested in outdoor leisure pursuits, which could tie in well with a Waterways holiday. Visitors from Germany are most likely to want to experience 'real' life, both rural and in cities.

Itineraries that include both cultural and historic experiences but also offer 'down-time' with shopping and relaxed pub/restaurant stops should have wide appeal



## Example Itineraries

### 1. Warwickshire Ring – Waterways by Narrowboat

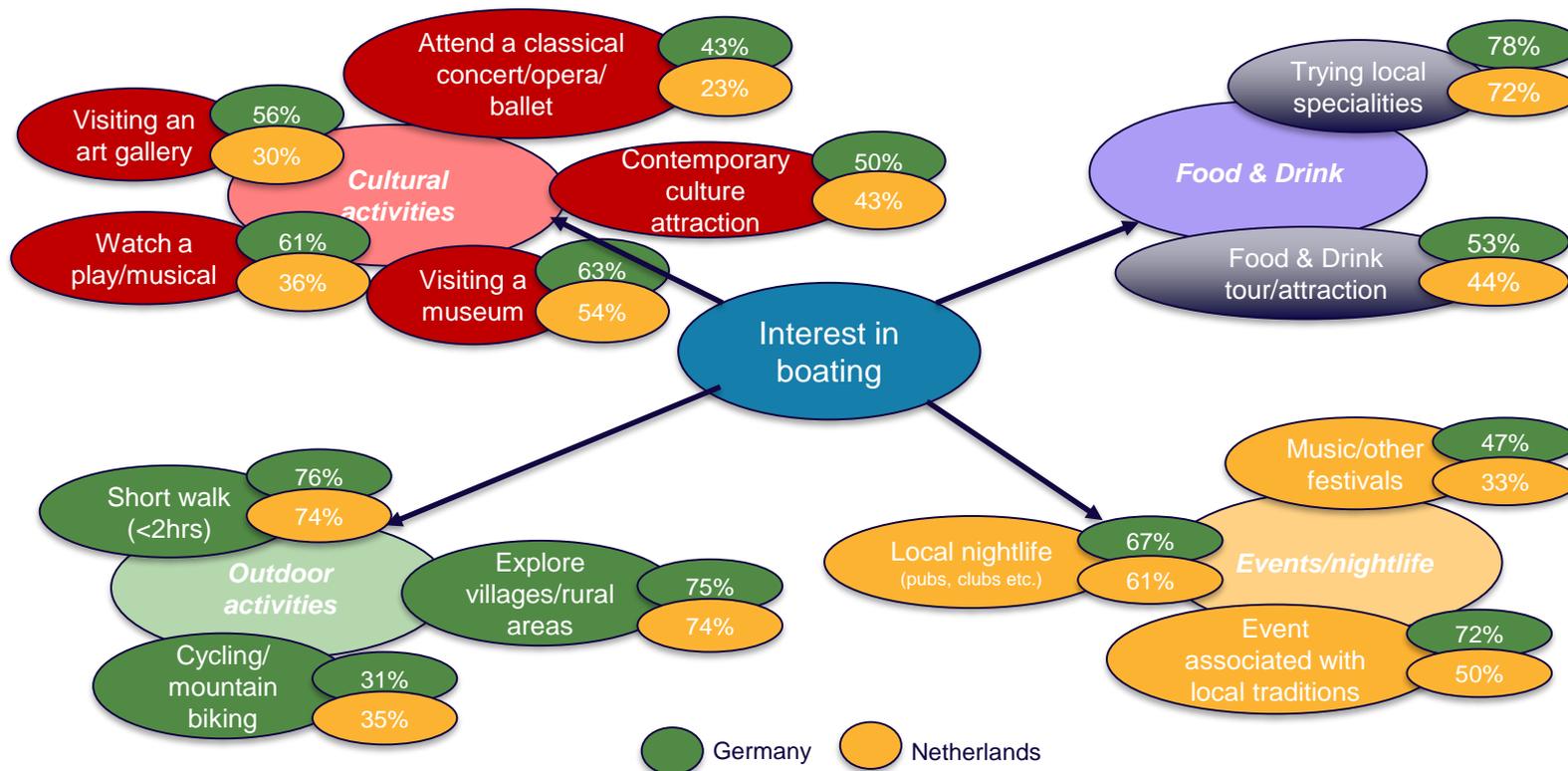
| Warwickshire Ring – Waterways by Narrowboat   |                                                                                                                                                                |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target: 50 65, German, small groups & couples |                                                                                                                                                                |
| From £2,000 per couple                        |                                                                                                                                                                |
| Day                                           |                                                                                                                                                                |
| 1                                             | Train or taxi – BHX to Alvechurch<br>Narrowboat to Birmingham<br>Mahfil Restaurant - Curry                                                                     |
| 2                                             | Cadbury World – afternoon tea<br>Gas Street Basin – Cosmopolitan Birmingham<br>Bistro Pierre – classic French dining                                           |
| 3                                             | Mailbox - Shopping & Brunch<br>Jewellery Quarter – Shopping, museum & heritage walk<br>Purnell's Bistro – Michelin-starred                                     |
| 4                                             | Industrial scenery<br>North Warwickshire countryside<br>The Dog & Doublet – canalside authentic English pub                                                    |
| 5                                             | Kingsbury Park (Cycle hire option)<br>Middleton Hall – SSSI & mentioned in Domesday book<br>Bake180 Coffee Shop – quaint<br>Fazeley (Tamworth) Three Turns Inn |
| 6                                             | 8hrs cruising to Atherstone<br>Chapel House – Georgia restaurant in market square                                                                              |
| 7                                             | Lunch Greyhound Inn – canalside 'Best Pub in Coventry & Warwickshire'<br>Coventry Basin                                                                        |

| Day |                                                                                                                                          |
|-----|------------------------------------------------------------------------------------------------------------------------------------------|
| 8   | Coventry Cathedral<br>Coventry Transport Museum<br>Tumeric Gold Indian Restaurant                                                        |
| 9   | Lunch Barley Mow – boaters pub<br>Taxi to Draycote Water<br>World Rugby Hall of Fame museum<br>Braunston – choice of pubs, canal history |
| 10  | Countryside & villages to Warwick<br>Lunch Blue Lias – canalside pub<br>Warwick                                                          |
| 11  | Lord Leycester Hospital & Brethrens Kitchen<br>Warwick Castle<br>To Leamington Pump Rooms<br>Dinner – Sabai Sabai – Pan Asian food       |
| 12  | Hatton Flight – 21 locks<br>Lunch Hatton Arms – cask ale and British food<br>Baddesley Clinton 15 <sup>th</sup> Century house            |
| 13  | Lapworth Flight – 18 locks<br>Wharf Tavern – real ale and all-day food<br>Wedges Bakery<br>Earlswood Lakes                               |
| 14  | 6.5 hrs cruising back to Alvechurch<br>Taxi/train to airport                                                                             |

# Itinerary 1: Warwickshire Ring – Waterways by Narrowboat

The focus of Itinerary 1 is travel by narrowboat. Exploring interest in other activities among those who have an interest in boating shows a good fit to the activities in the itinerary, with a mix of historic and cultural activities. There is perhaps scope to offer walking excursions as part of itinerary as these people are also interested in short walks. For example there may be an option to lunch at the Blue Lias directly on the canal or to take a walk to a picturesque village or town nearby to tap into the interest in walking an local exploration. Seasonal tie-ins with events such as the Harbury or Long Itchington Beer festivals may be of interest particularly for visitors from Germany.

## Interest in other activities among those who are interested in boating (Germany 31%, Netherlands 40%)



## Example Itineraries

### 2. Severn Way Walking – Exploring the Severn Way in the Heart of England

| Severn Valley Walking                       |                                                                                                                                                                                                                        |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target: 35-60 Dutch, small groups & couples |                                                                                                                                                                                                                        |
| From £1,000 per couple                      |                                                                                                                                                                                                                        |
| Day                                         |                                                                                                                                                                                                                        |
| 1                                           | Train from BHX to Shrewsbury<br>Explore historic market town<br>Shrewsbury Cathedral<br>The Quarry park<br>The Boathouse – historic pub<br>Lion & Pheasant Hotel 3*                                                    |
| 2                                           | Ground handler will take luggage to next nights accommodation<br>9.5 miles walking Shrewsbury to Wroxeter, breathtaking scenery<br>Lunch Corbet Arms – traditional meals<br>The Mytton & Mermaid 3* - homely coach inn |
| 3                                           | Wroxter English village<br>2 miles walking Wroxeter Roman City<br>Wroxeter Roman Vineyard – afternoon tea, tour & tasting                                                                                              |

| Day |                                                                                                                                                                                                                                       |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4   | 10 miles walking to Ironbridge<br>The Library House – award winning boutique B&B                                                                                                                                                      |
| 5   | Ironbridge<br>Museum of the Gorge<br>The Iron Bridge and Tollhouse<br>The Halfmoon pub – BBQ food<br>Blist Hill Victorian Town<br>Restaurant Severn – fine dining in quant building<br>The Library House – award winning boutique B&B |
| 6   | 9.5 miles walking to Bridgnorth<br>The Kings Head – traditional British pub<br>Bridgnorth Museum Northgate – model steam engine<br>The Bass Villa – classic English                                                                   |
| 7   | Bridgnorth to Kidderminster on Severn Valley Railway<br>Train to BHX (via Smethwick)                                                                                                                                                  |



Note: these itineraries have quite a focus on industrial history but this has not been broken out as a specific activity in the research. We therefore make assumptions based on appeal of historic buildings and iconic sites.

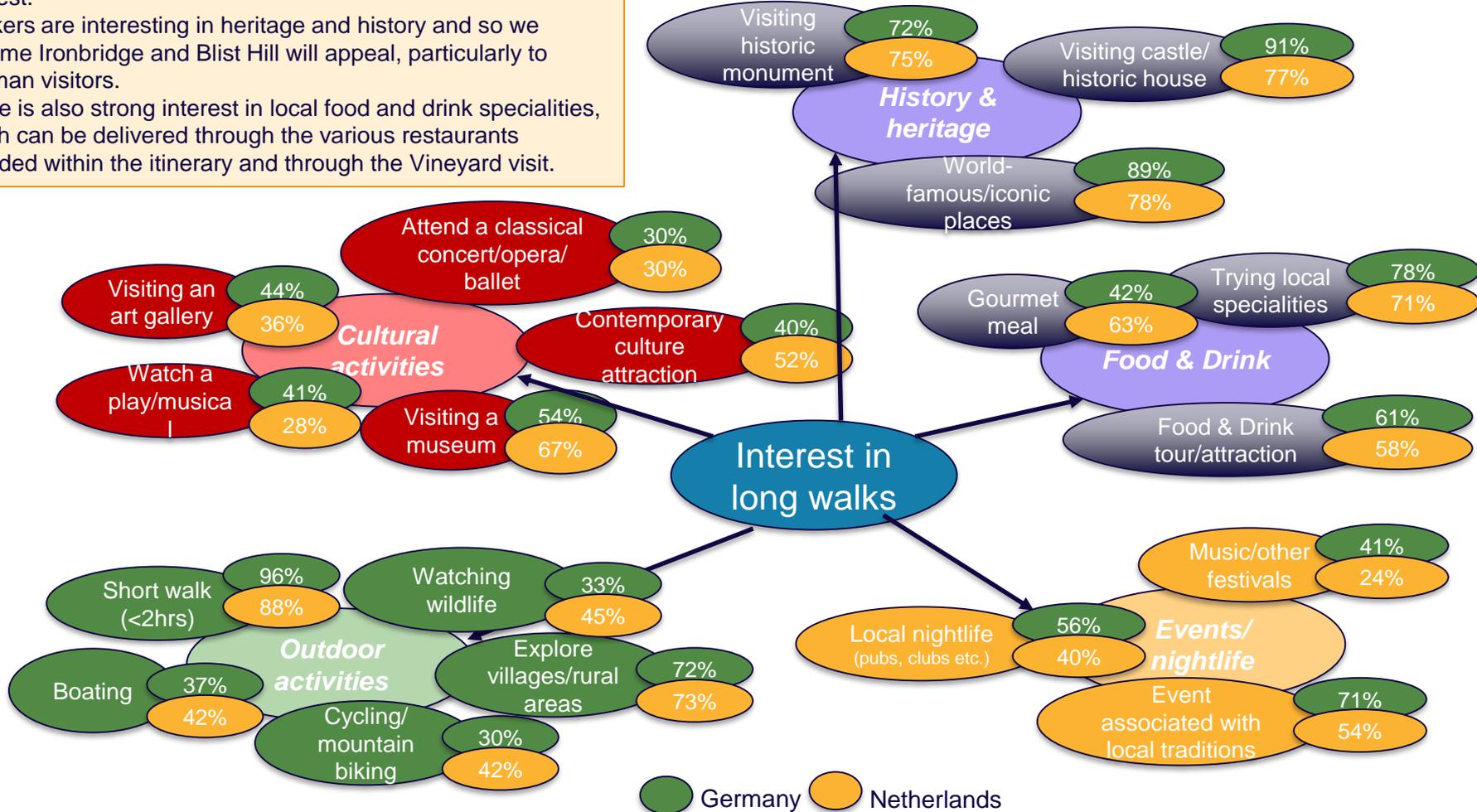
# Itinerary 2: Exploring the Severn Way - Walking

The focus of Itinerary 2 is walking. Among those interested in long walks, other outdoor activities and exploration are of interest.

Walkers are interesting in heritage and history and so we assume Ironbridge and Blist Hill will appeal, particularly to German visitors.

There is also strong interest in local food and drink specialities, which can be delivered through the various restaurants included within the itinerary and through the Vineyard visit.

## Interest in other activities among those who are interested in long walks (Germany 46%, Netherlands 49%)



% who are very/quite interested in each activity among those who are very/quite interested in long walks (46% DE / 49% NL)

## Example Itineraries

### 3. Severn Way Waterside – Exploring the Severn Way in the Heart of England

| Severn Valley Walking                       |                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Target: 35-60 Dutch, small groups & couples |                                                                                                                                                                                                                                                                                                                                   |
| From £1,500 per couple                      |                                                                                                                                                                                                                                                                                                                                   |
| Day                                         |                                                                                                                                                                                                                                                                                                                                   |
| 1                                           | Car Hire<br>Drive BHX to Shrewsbury<br>Explore historic market town<br>Shrewsbury Cathedral<br>The Quarry park<br>The Boathouse – historic pub<br>Lion & Pheasant Hotel 3*                                                                                                                                                        |
| 2                                           | The Dana Prison<br>St Nichols café – old church, local ingredients<br>Shropshire Regimental Museum<br>Lion & Pheasant Hotel 3* - a la carte restaurant                                                                                                                                                                            |
| 3                                           | Wroxter English village<br>Wroxeter Roman City<br>Wroxeter Roman Vineyard – afternoon tea, tour & tasting<br>The Mytton & Mermaid 3* - homely coach inn                                                                                                                                                                           |
| 4                                           | Attingham Park – 18 <sup>th</sup> century mansion & deer park (& events e.g. outdoor cinema)<br>Mansion Tea Room<br>Drive to Telford<br>The Kynnersley Arms – real ale, historic mill<br>Ironbridge Gorge<br>Darby Houses<br>Restaurant Severn – find dining in quaint building<br>The Library House – award winning boutique B&B |

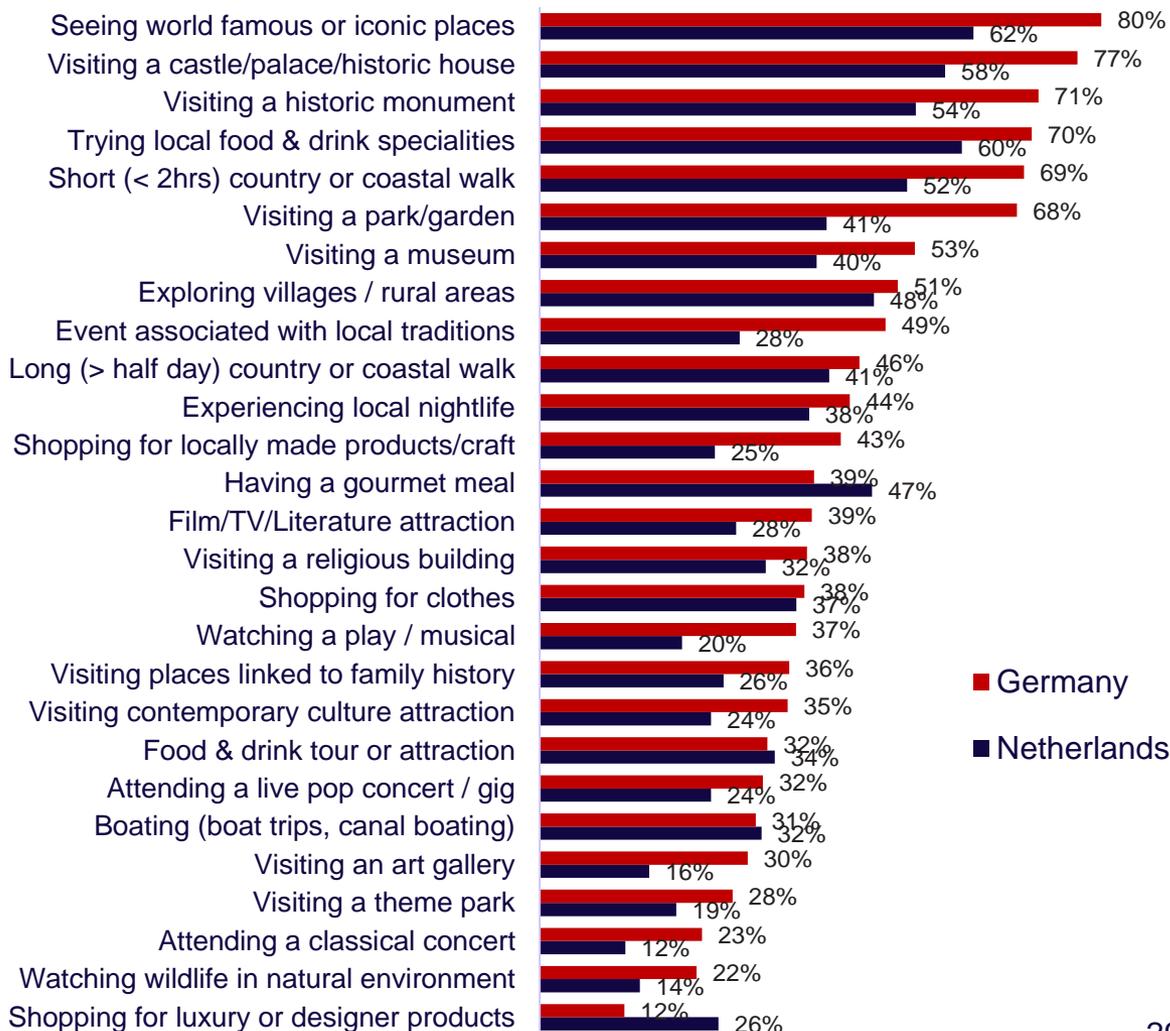
| Day |                                                                                                                                                                                                                                                                                                                                             |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5   | Ironbridge<br>Museum of the Gorge<br>The Iron Bridge and Tollhouse<br>The Halfmoon pub – BBQ food<br>Blist Hill Victorian Town<br>Tar Tunnel<br>Bassa Villa – relaxed pub setting                                                                                                                                                           |
| 6   | Drive to Bridgenorth<br>Self-guided tour<br>Bridgnorth Cliff Railway<br>Thomas Telford Church<br>Lunch at The George – traditional coaching inn<br>Bridgnorth Northgate Museum<br>Leisure boutique shopping (festivals/events)<br>Kings Head Pub – local cask ales, cosy, liked by locals and tourists<br>Bassa Villa – relaxed pub setting |
| 7   | Drive to BHX                                                                                                                                                                                                                                                                                                                                |



# Itinerary 3: Severn Way Waterside – Car Hire

- As noted 45% of Germans and 41% of Dutch visitors are willing to hire a car while on holiday in England (and around 1/4 bring their own car), so car-based touring has broad appeal in these countries.
- Looking at those people who would be willing to hire a car we see a reasonably consistent pattern in terms of activities visitors would be interested in.
- Food and drink experiences are of more interest to the Dutch than the Germans.
- The current itinerary has a good mix of relevant activities, including historic attractions and the opportunity to experience local traditions and activities.
- As these people have a car with them, it may be appropriate to offer some flexibility in the itinerary so that visitors feel they are still able to have some flexibility and spontaneity in their holiday.

## Activities those who would hire a car would consider doing





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Insight

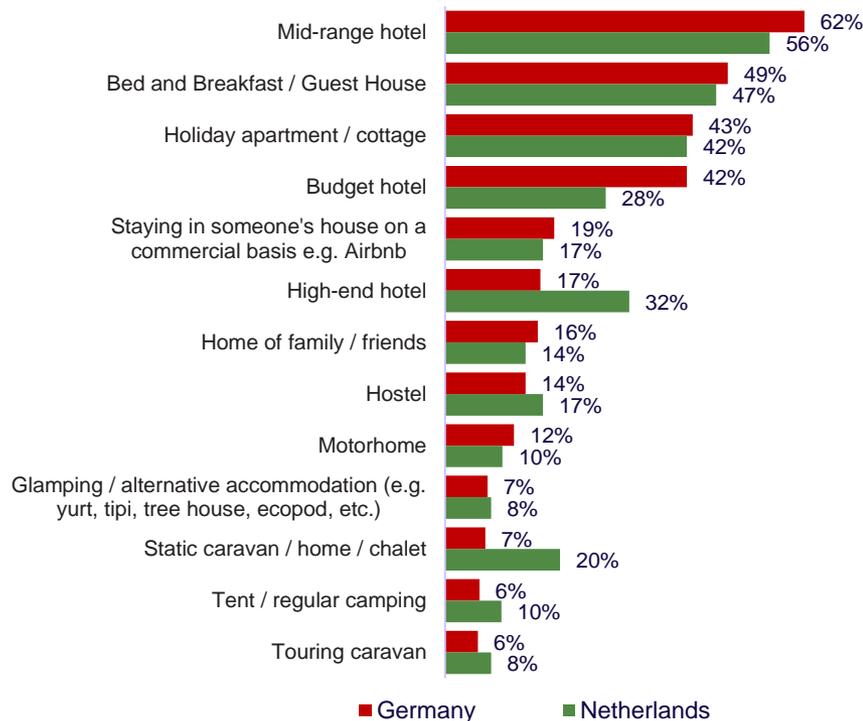
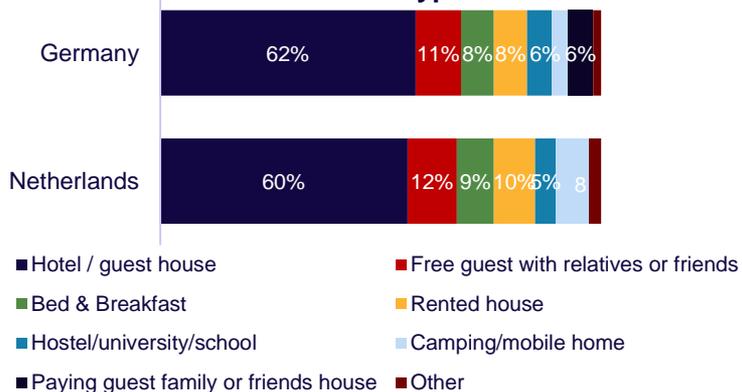
A narrowboat is shown from a rear-quarter perspective, moving along a canal. The boat has a dark green upper hull, a white middle section, and a red lower section. A man in a blue and white plaid shirt and a black cap stands at the helm, and a woman in a white shirt sits next to him. The boat is decorated with several flags, including a Union Jack and a Swedish flag. The canal is surrounded by lush green trees and foliage. The text 'Completing the England's Waterways Experience Accommodation' is overlaid in white on the right side of the boat.

Completing the England's  
Waterways Experience  
Accommodation

# Accommodation is currently dominated in volume terms by mainstream hotels but there is great potential to sell in 'interesting' alternatives as part of an itinerary

- Accommodation is **not** a motivator for visiting England; Only 16% of visitors see the variety & quality of accommodation as a motivator. Promoting 'wow' properties (e.g. a lock-keepers cottage, glamping at Warwick Castle) at a reasonable price will provide a surprise and delight feature for potential visitors and assist the travel trade in selling in the Midlands.
- Over half of visitors from target countries book their accommodation and travel separately.
- Over half of accommodation bookings are made direct with the provider.
- Over 70% make that booking online.

Accommodation Type – All UK



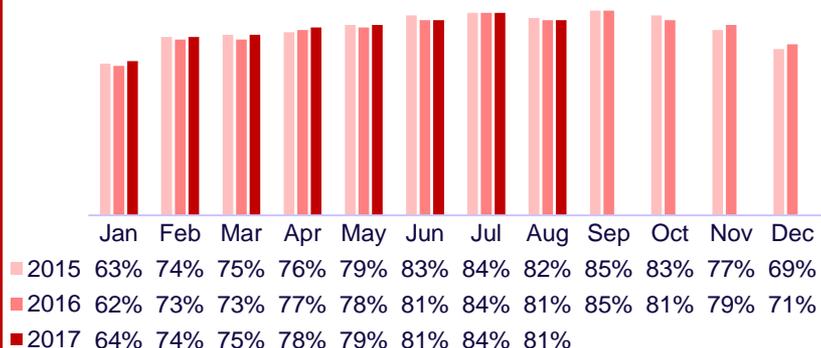
**Implication**

- Visibility online is key to the success of accommodation providers, for awareness, consideration and booking.
- This is both through their own online channels and through OTAs, DMOs, review sites etc.
- This is important for both large hotels and smaller independents/alternative accommodation types that form part of the 'authentic/real' England experience.

# 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.



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

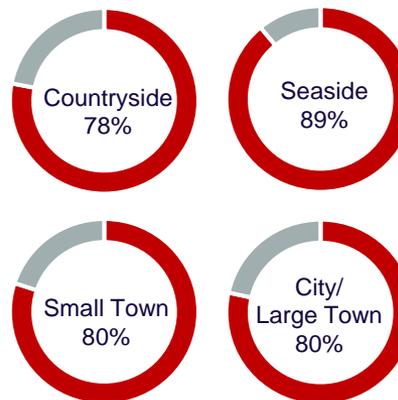
Travel trade say there is a lack of willingness from many hotels to provide fixed rates and allocations more than 6 months in advance.

## Availability & Capacity by type and location

Highest August occupancy areas:

|                       |            |
|-----------------------|------------|
| <b>West Midlands</b>  | <b>76%</b> |
| <b>East Midlands</b>  | <b>75%</b> |
| <b>Greater London</b> | <b>82%</b> |

Travel Trade have concerns about availability, however there is greater free capacity in the Midlands



August occupancy highlights a challenge.

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 of the German market."

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 reflect 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.
- 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 (German).
- Focus on off-peak, whilst Peak capacity remains an issue.



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# Completing the England's Waterways Experience

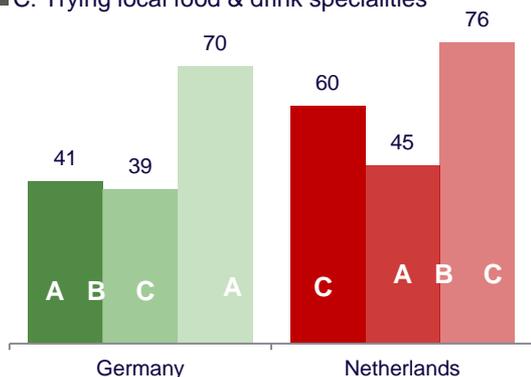
## Food & Drink

# Food and drink, whilst not a driver to visit is an important part of the whole experience

- Food & drink is rarely a main reason to visit Britain (5% of 2015 visitors) but can play a significant supporting role.
- There is appetite to try food & drink related activities among those considering visiting Britain – there is most interest across all target markets in trying local food & drink specialities.

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

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

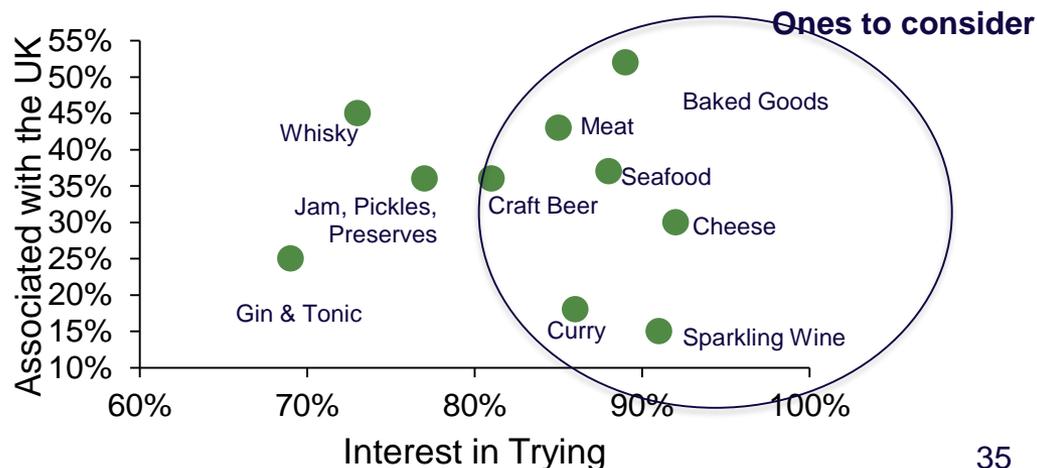


Previously tried new food on holiday:

76%

58%

- Trying British dishes is of interest, particularly full English breakfasts (49% extremely/very interested), roast dinners (46%), fish & chips (45%) and afternoon teas (45%).
- But there is also high interest for more local food and drink specialities – and the **low association of some of these could be expressed as a unique experience.**



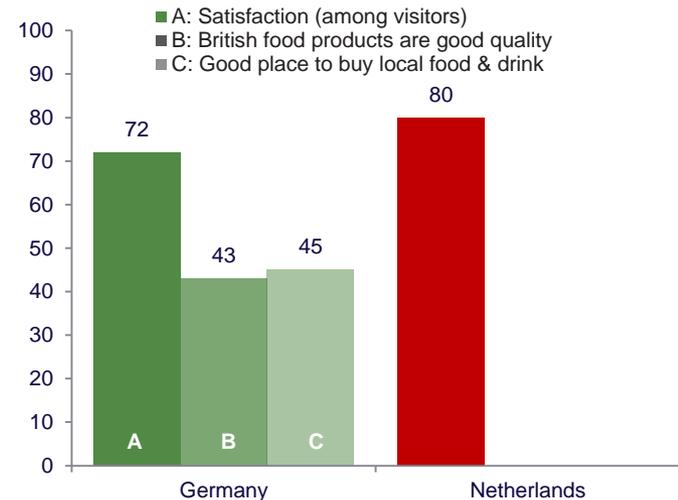
## Quality is an important area to focus on

- With **46%** of all inbound visits including a visit to a pub, it is already an established behaviour that can be built on.
- Social media is used to look for recommendations for places to eat: Germany 15%, Netherlands 15%, so online visibility is important for restaurants and pubs.
- Women are more likely than men to try local food and drink specialities, but older people are less likely to:

| Age           | Would try local specialities | Would try high quality (gourmet food & drink) |
|---------------|------------------------------|-----------------------------------------------|
| 35 – 44 years | 72%                          | 66%                                           |
| 45 – 50 years | 73%                          | 66%                                           |
| 51 – 64 years | 68%                          | 60%                                           |
| Over 64 years | 65%                          | 52%                                           |

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

### Satisfaction with Food & drink among visitors to England



“The good news for destination marketers and food/drink business owners is that authenticity is extremely hard to replicate, meaning people must travel to get a “*real taste*” of something.” Erik Wolf



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Completing the England's  
Waterways Experience

Using Technology

# Social media presence is now part of everyday life, even on holiday

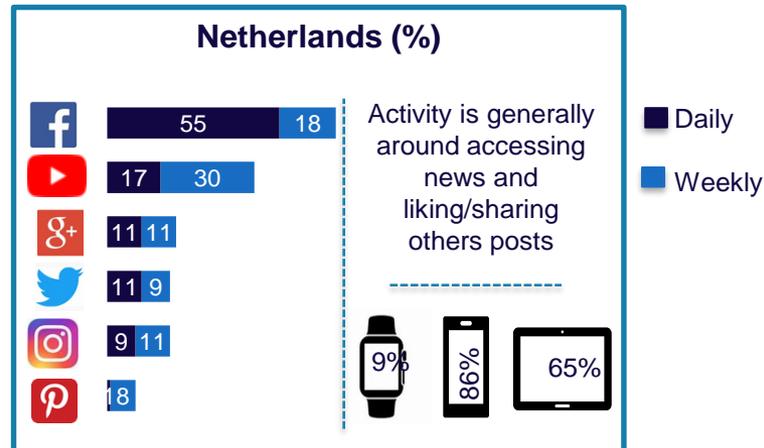
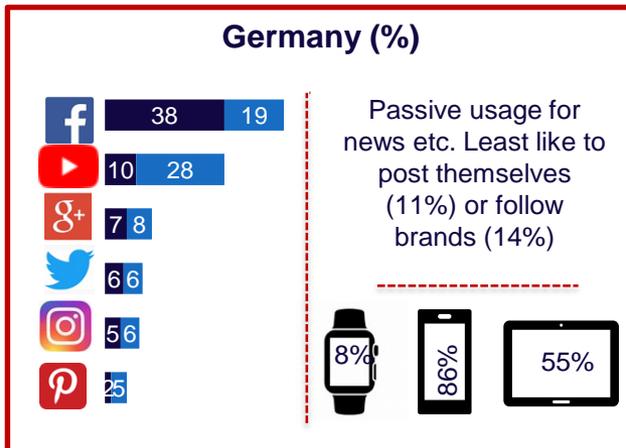
## Social Media Usage

Facebook and YouTube dominate.

Women and younger people are typically the most involved in social media.

## Tech ownership

Smartphones are almost universal, over half have a tablet. Smart watches are owned by less than one in ten.



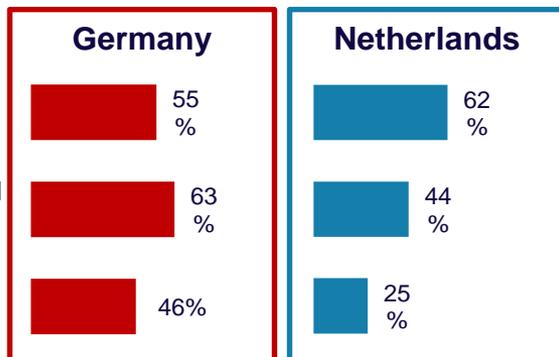
- Facebook is the most widely used platform.
- Activity tends to be more focused on accessing information (factual and 'gossip'). It is only a minority that post comments and even fewer who write blogs and opinion pieces.
- Apps and websites must be optimised for smartphones as that is the almost universal device.

## Tech on holiday

I like to stay connected when on holiday

My smartphone is essential when I go on holiday

My tablet is essential when I go on holiday

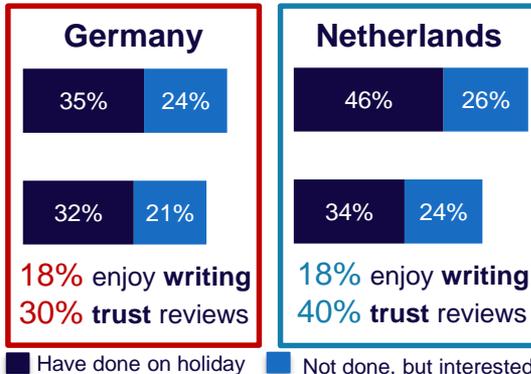


## Reviews on holiday destinations

### Access reviews about..

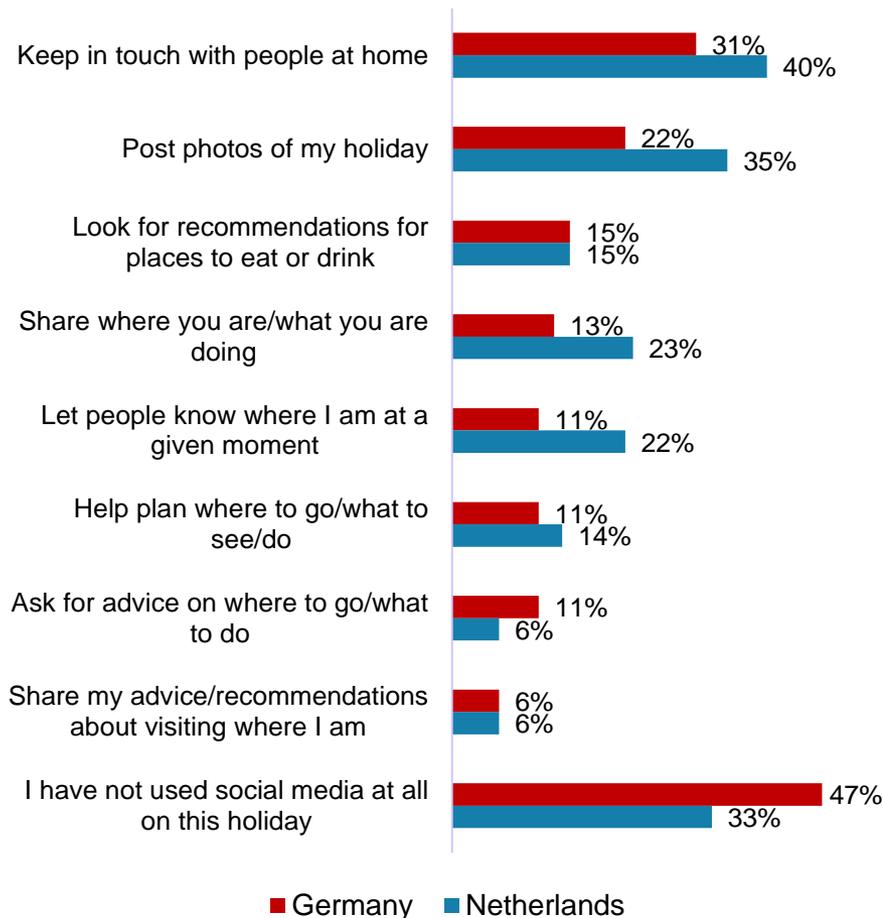
Attractions/places to see on holiday

Places to eat or drink on holiday



# Use of Social Media on holiday is high

% using social media on holiday in Britain to....



- General social media usage remains high while on holiday: 8 in 10 Germans and around 9 in 10 Dutch use social media.
- However, on holiday in Britain that usage drops somewhat and a third of Dutch and just under half of Germans do not use social media.

### Information

- Whilst only a minority use social media for advice on both food & drink and activities/places to go, it is likely to grow further in importance as a source of information for travellers.

### Activity

- The Dutch are particularly active with sharing posts and experiences from their holiday, but are the least likely to ask for advice.

The opportunity to engage with travellers through social media is clear, as is the potential increased media coverage through traveller posts.



Planning & Booking

The Purchase Journey



## Travel Trade – Perceptions of England, themes and activities

### Regions

- The South of England is most popular.
- Destinations within a day-trip of London.
- Cotswolds growing in interest.

“The market into England does not change a lot. Guests will continue to want to travel to the south and south west. They will want to experience nature and do soft activities such as walking and cycling.” German Operator

### Themes & Activities

- History & heritage.
- Countryside.
- Culinary experiences.
- TV & film inspired visits.
- Sport.

“Clients will look for special experiences, hidden gems, to combine the classics with the unusual.”

### Attractions

“We are at times victims of our own success. We work hard to offer new visitor attractions to our ..... when the programmes take off, clients loving the experience, the cooperation is suddenly brought to a halt.”

### Competition

- Scotland, Ireland, Nordics

I've always considered England to be an older people's destination. We hear a lot about Gardens and the Queen. I think Ireland, Wales, and Scotland are definitely kicking butt and promoting different enticing offers with taglines that have stuck ...Wild Atlantic Way, Ancient East, #ScotSpirit.”

### Opportunity

- As well as offer & infrastructure, communication to raise awareness & understand is vital.

“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”.

### Opportunity

- A wide range of activities and themes to explore.
- Most offer the ability to personalise.
- Be consistent in focus – planning cycles can be 6-24 months. Longevity builds confidence and trade commitment.

### Opportunity

- Looking for off-the beaten track destinations.
- Improve attraction offer for groups – opening times, rates, access for coaches, group sizes etc.
- More ground handlers and guides with language capability (French & German).

### Opportunity

- England is considered a safe destination among the travel trade.
- New products and packages.
- Sustained and focused promotion.
- Early release of information: 12 – 18 months before.

## Travel Trade – Perceptions of England, themes and activities. Many concerns will be addressed by Discover England Fund projects

### Germany

- Travel agents are a strong sector.
- England seen as safe.
- Resurgence in coach tours.
- Personalised, specialist products (different from the OTA offer).
- Brexit concerns around not being welcome.
- Rural England more attractive than cities.
- South of England still the focus, limited Interest in other regions.
- Bed & Breakfast recognised as a unique English strength.
- Fundamental elements to address:
  - Poor service and value (quality & price) seen as barriers.
  - Attractions not catering for groups.



### Netherlands

- See tour operator role as changing – more specialist. Emphasis on adding value and offering original travel products.
- England is an all-round tour destination.
- London is stand-alone and not necessarily part of a wider England tour.
- Have tried and failed to sell central and northern England destinations in the past – this will increase the challenge for selling in for new products.
- Want more cheap flights to regional airports and greater ferry capacity.
- More cohesion in regional products and more proactive development – information & genuine packages.



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

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

### Future Travel Trend – *Wishlisting*

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

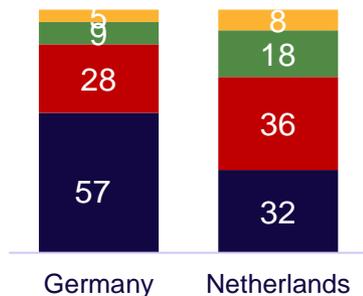
### Key stages and roles in the planning process (%):



**The planning process:** The length of the booking process varies by market and by age; the lead time to booking is longer in Germany than the Netherlands – important to take into account when planning and measuring marketing activity

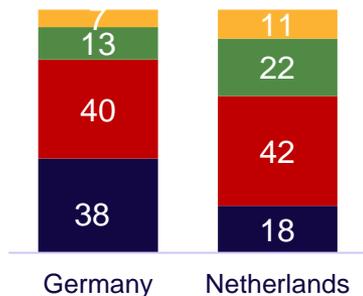
**Started thinking about their trip (%)**

- The lead time for considering a trip is longest in Germany.
- In the Netherlands and France, around a third of visitors only started to think about it 3-6 months in advance.



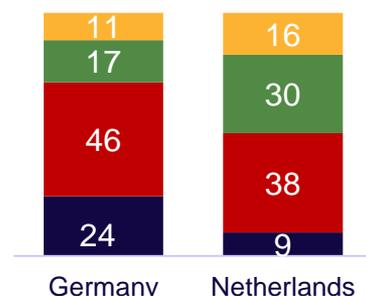
**Decided on the destination (%)**

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



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

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



**Booked the trip (%)**

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



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



# Travel Media Consumption



## Germany

- **Magazines**
  - “ADAC Reisemagazin” (circulation: 94,838),
  - “Geo Saison” (88,638)
  - “Reise und Preise” (72,060)
  - “Abenteuer Reisen” (58,494)
  - “Lonely Planet Traveller Magazine” (55,000).
- **Travel blogs** are less popular than in other European countries with a limited number of them available.
- **Dedicated TV travel programmes:** “Da will ich hin...” (SR), “Service Reisen” (HR), “Reisewege” (SWR) and “Nordseereport” (NR) as well as inter-cultural travel programmes on the German-French quality channel ARTE.
- 45.3 million read **newspapers** each day . All newspapers have weekly travel or lifestyle sections with the content being a compilation of internally produced travel features (often the result of press visits) and articles from news agencies and freelance journalists



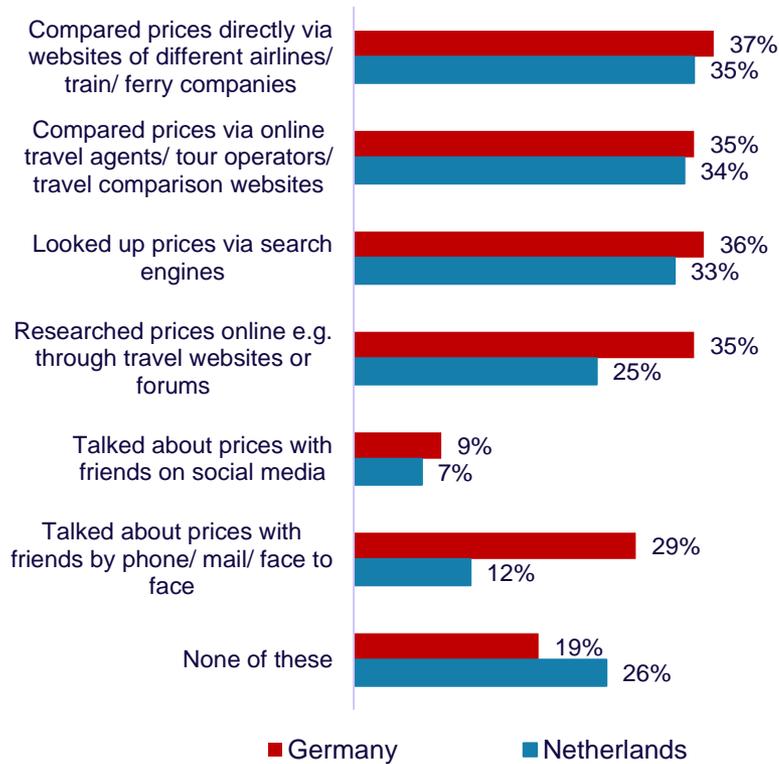
## Netherlands

- **Magazines**
  - 80% of the Dutch population (11.4 million people) read magazines.
  - Top Dutch travel magazines:
    - REIZ& Magazine (circulation: 22,624)
    - National Geographic Traveler (circulation: 37,403)
    - Lonely Planet Traveller (circulation: 25,000)
    - Columbus Travel (circulation: 45,000)
- Travel **blogs and vlogs** have grown exponentially over the last years. Image-led content, like posts on Instagram, has the most influence on travel behaviour. (TravelNext). Most Dutch influencers share their content in English, so they have a global rather than a local reach.
- **Travel shows on Dutch TV:** 3 op Reis, Campinglife, De zomer voorbij, Erica op reis, Groeten van Max, Ik vertrek, Lekker weg in eigen land.
- 50% of households read a **print newspaper** daily . Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists.

# Price Sensitivity and the role of Online Travel Agents

Britain is perceived as an expensive place to visit by many (typically 55-65% in priority markets). However 1 in 4 visitors from Netherlands would do no price comparisons before visiting Britain.

## % who would do this before booking a holiday to Britain



### Future Travel Trend – Conversational Commerce

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

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

MALE, 64, GERMANY

# 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.
- 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 on 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 (see Transport section).

## 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.

|                                                               | DE  | NL  |
|---------------------------------------------------------------|-----|-----|
| I often compare prices from multiple OTA websites             | 62% | 63% |
| OTAs are a good way of finding a destination within my budget | 64% | 61% |
| Best way of getting the lowest price                          | 55% | 45% |

%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.

## Key influencers: Online and offline sources both play a role influencing choice of Britain as a destination

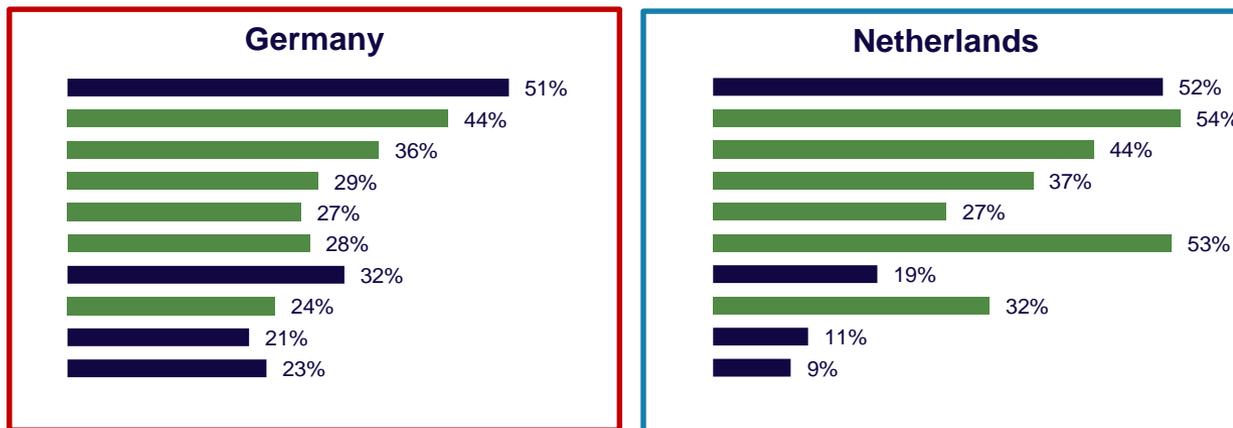
- While 'word of mouth' is the biggest influence across all age groups on destination of choice, there are some key differences to be noted for your target markets and segments.
- Those in the Netherlands are more likely to build their holiday themselves via search engines and direct with the accommodation, while in Germany, word of mouth is key. This is reflected in greater number of influences on their decision
- The importance of hotel websites should be noted especially for Netherlands and, whilst smaller independent hotels add to the unique English experience they also need to be visible online in order to be accepted in the target countries

### Top Sources of Influence on destination

#### Sources of Influence

Word of Mouth  
 Search engines  
 Price comparison site  
 Traveller review sites  
 Social media network  
 Accommodation/hotel website  
 Travel guidebook  
 Travel agent website  
 Official tourist brochure  
 Magazine/newspaper articles

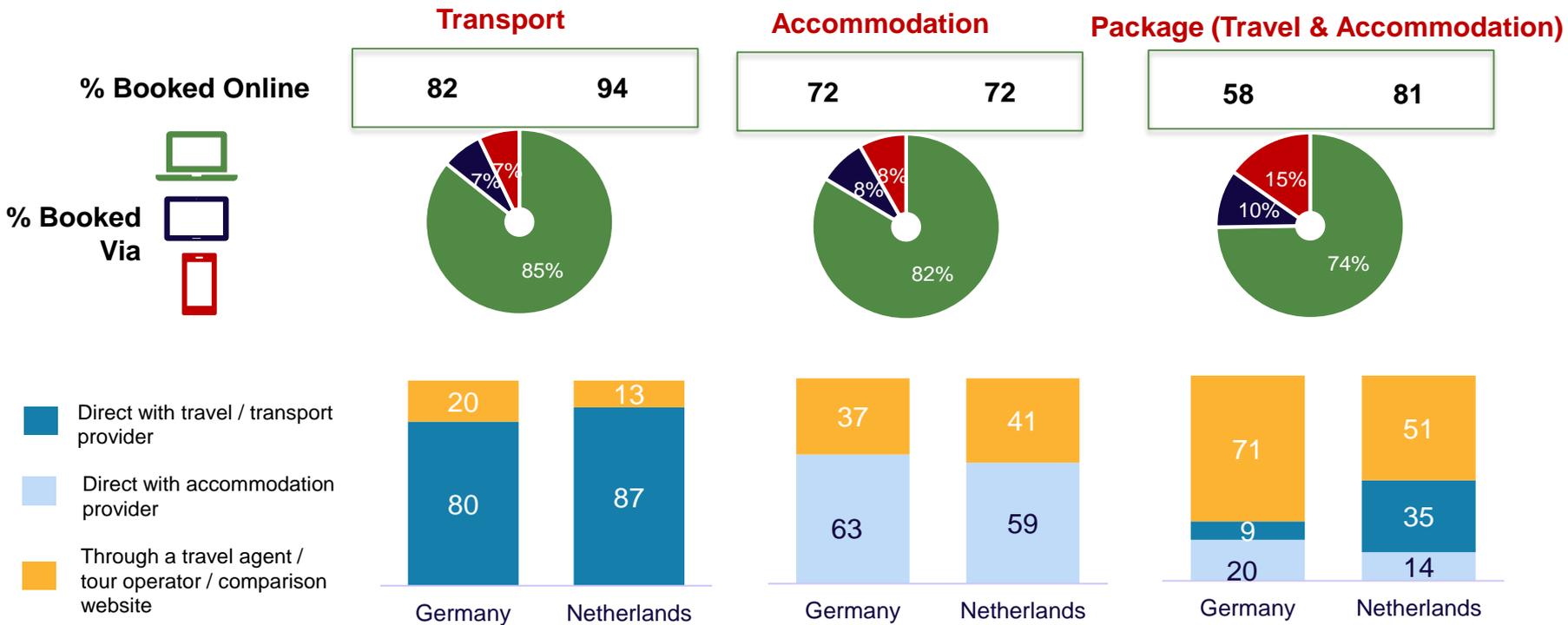
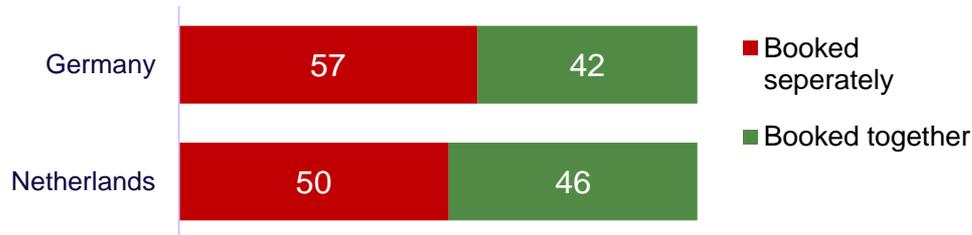
■ Online ■ Offline



## Making the booking: an online dominated process

### Travel & Accommodation Booking (%)

- The Dutch are most likely to book a package.
- Online dominates independent bookings, smart phone bookings are a small proportion of bookings (highest for package).
- Travel agent engagement with the choice of accommodation in itineraries will be important



# The Travel Trade Landscape



Top ten operators in the Netherlands in 2014

| Top Ten Tour Operators  | Turnover €m | Pax       |
|-------------------------|-------------|-----------|
| TUI Nederland           | 1,115       | 1,542,000 |
| Thomas Cook Nederland   | 420         | 790,000   |
| Sundio Group            | 346         | 550,000   |
| Corendon                | 345         | 618,000   |
| Travelbird              | 334         | unknown   |
| @Leisure                | 246         | 618,000   |
| ANWB Reizen Groep       | 190         | 235,000   |
| Vacansoleil             | 98.5        | unknown   |
| De Jong Intra Vakanties | 72          | 168,000   |
| Alltours                | 68          | 75,000    |

Major tour operators with a Britain programme



Source: VisitBritain Market and Trade profiles



Top ten operators in Germany in 2015/16

| Top Ten Tour Operators   | Turnover €m | Pax       |
|--------------------------|-------------|-----------|
| TUI Deutschland          | 4.400,0     | 6.000,000 |
| Thomas Cook Group        | 3.500,0     | 6.100,000 |
| DER Touristik            | 2.800,0     | 5.400,000 |
| FTI Group                | 2.210,0     | 3.900,000 |
| Aida Cruises             | 1.500,0     | 908,000   |
| Alltours Flugreisen      | 1.330,0     | 1.620,000 |
| Schauinsland Reisen      | 1.100,0     | 1,370,000 |
| TUI Cruises              | 821,0       | 413,752   |
| Phoenix Reisen           | 327,2       | 154,058   |
| Hapag-Lloyd Kreuzfahrten | 296,7       | 28,898    |

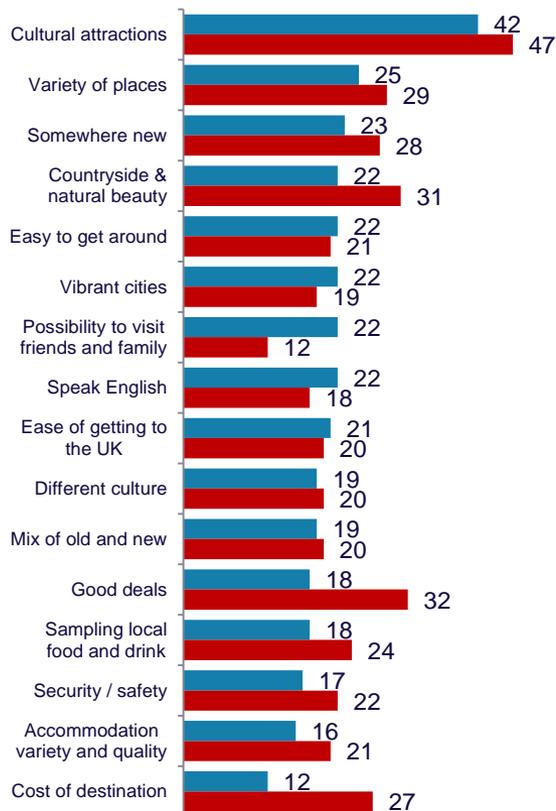
Source: fvw Dossier, Deutsche Veranstalter 2016, 23rd December 2016

Major tour operators with a Britain programme



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

### Top Motivators to Visit Britain (%)



■ Visitors ■ Considerers

- Across each target market, cultural attractions are the main motivator for visiting Britain across visitors and considerers.
- 'Countryside and natural beauty' is among the top 3 reasons for both target markets.
- There are potential barriers which could be used as opportunities in your messaging i.e. it's safer in the countryside; cheaper outside London etc.
- Some reassurance may be needed for narrowboats going urban areas such as Birmingham and Coventry. Showing photographs of canalside destinations and overnight moorings will demonstrate the attractiveness of these areas.

|                    | Top 3 Motivators                                                                                                                                                | Potential Barriers*                                                                                                                          |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Germany</b>     | <ul style="list-style-type: none"> <li>• Cultural attractions (49%)</li> <li>• Variety of places (41%)</li> <li>• Countryside / natural beauty (38%)</li> </ul> | <ul style="list-style-type: none"> <li>• Cost of destination (9ppt lower)</li> <li>• Security / Safety (8ppt lower)</li> </ul>               |
| <b>Netherlands</b> | <ul style="list-style-type: none"> <li>• Cultural attractions (44%)</li> <li>• Countryside / natural beauty (36%)</li> <li>• Vibrant cities (31%)</li> </ul>    | <ul style="list-style-type: none"> <li>• Security / Safety (13ppt lower than avg)</li> <li>• Ease of getting around (10ppt lower)</li> </ul> |

\* Biggest gaps to all country average for motivations

**Bookable products:** Those in the Netherlands are most likely to be spontaneous both with travel arrangements and activities. The challenge will be to encourage pre-booking of activities when booking travel and accommodation

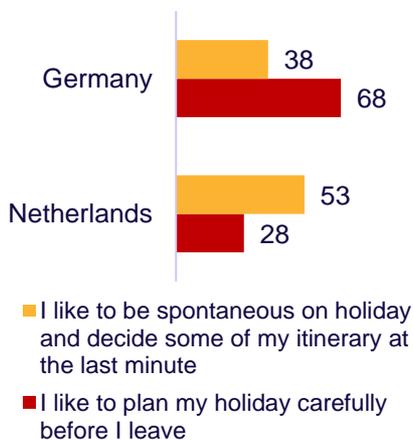
As noted earlier there is a balance to be found between providing interesting and well-planned itineraries and giving enough flexibility to meet the needs of those seeking spontaneity.

Providing optional or alternative activities within itineraries may be beneficial e.g. time for shopping as an alternative to a museum visit.

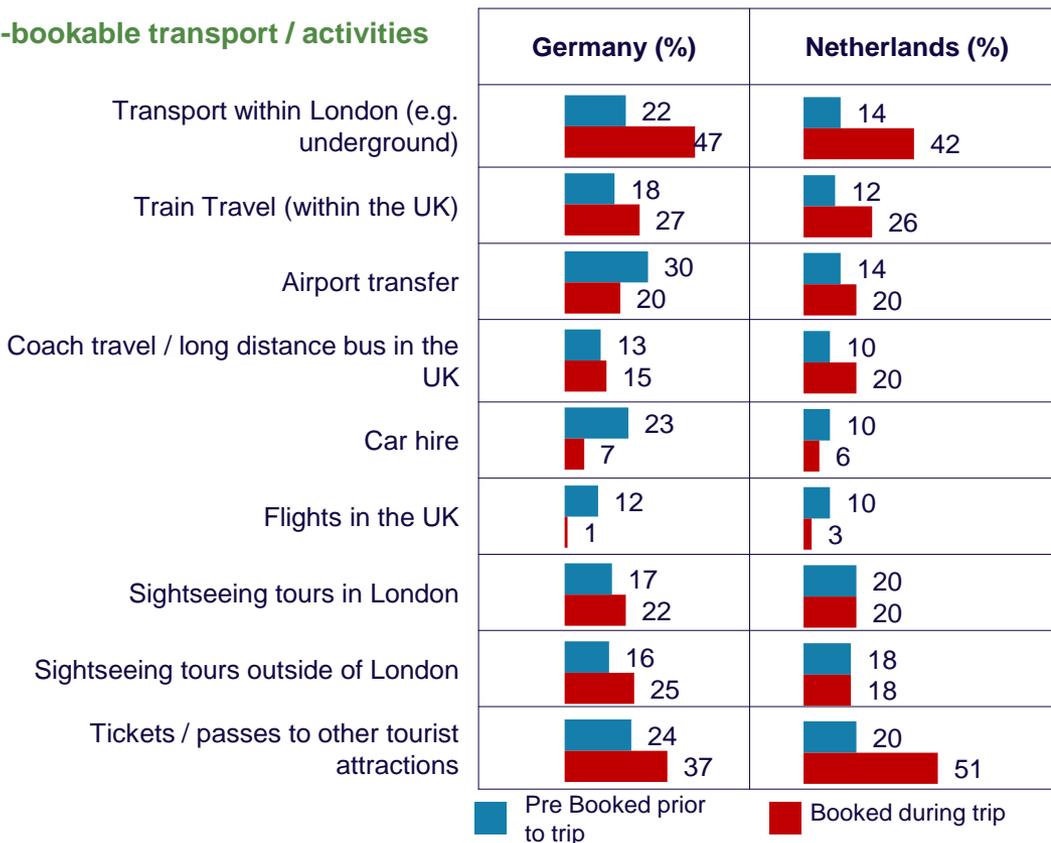
Packaging of attractions within an itinerary should increase the proportion of pre-booked activities.

**Itinerary planning vs. spontaneity (%)**

- Those in the Netherlands are much more likely to be spontaneous whilst on holiday compared to the Germans



**Pre-bookable transport / activities**





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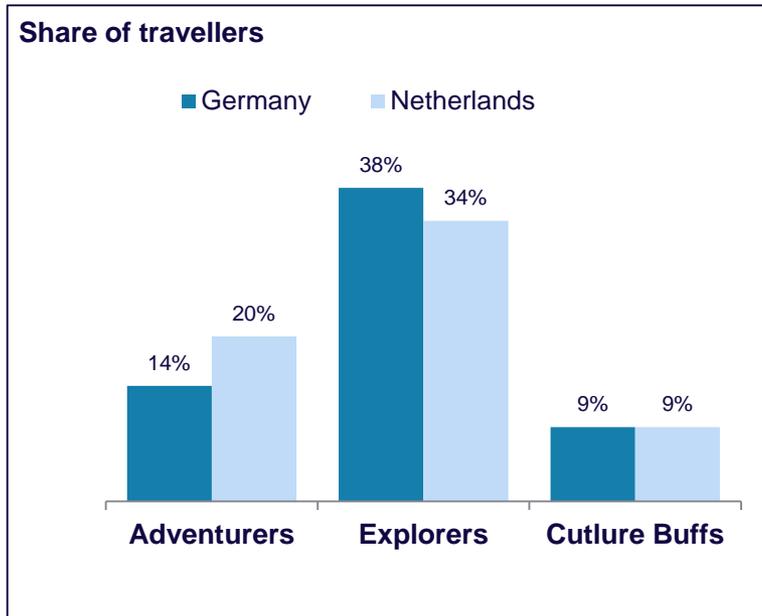
Insight

# How to optimise the England's Waterway Opportunity

## Segment Overview

## Three potential target segments are identified. Itineraries can be shaped to increase appeal to either individual or a number of segments

- 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 three segments that the Waterways project can reach – **Explorers**, **Adventurers** and **Culture Buffs** (see next slides for profiles).



Individual itineraries could be tailored to specific segments. For example the rural life experiences will appeal more to Explorers and Adventurers.

Segment profiles also indicate the messaging that will resonate best in marketing communications around the holiday:

- The Culture Buffs maybe more inspired by the itinerary that include Birmingham and Coventry.
- Adventurers may be inspired by the idea of taking charge of a narrow boat, enjoying the challenge of a new activity. The destinations included within this itinerary will also appeal to Culture Buffs.
- Explorers are likely to be enthused by the walking activities included within Severn Way Walking Itinerary.
- Both Adventurers and Explorers should be inspired by the freedom they get through the Severn Way Waterside itinerary that relies on car hire.

# Segment Targeting Summary – two core segments, but opportunity to also reach Culture Buffs and Sightseers

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

# ADVENTURERS

## AGE

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

## KEY MARKETS

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

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

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

## DEFINING ATTITUDES

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

## GENDER

- 53% Male

## FAVOURITE TRAVEL ACTIVITIES

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

## UNIQUE TRAVEL ACTIVITIES (versus other segments)

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

## GB LIKELY ACCOMMODATION (unique vs others segments)

- Bed & Breakfast popular

## TRAVEL PLANNING & STYLE

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



## WHO ARE THEY?

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

# EXPLORERS

## AGE

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

## KEY MARKETS

- Australia, Germany, France

## GENDER

- 52% Female

## DEFINING ATTITUDES

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

## FAVOURITE TRAVEL ACTIVITIES

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

## UNIQUE TRAVEL ACTIVITIES

(versus other segments)

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

## GB LIKELY ACCOMMODATION

(unique vs others segments)

- Bed & Breakfast
- Self-catering

## TRAVEL PLANNING & STYLE

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



## WHO ARE THEY?

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

# 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 are 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.



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Summary –  
key take-outs



## Key take-outs and opportunities – Itineraries (1)

### Transport Modes

- The example itineraries cater for a range of different travellers:
  - Narrowboat hire – for those who want the adventure of taking charge of their own narrowboat, perhaps lower incidence overall, but a high impact, unique experience.
  - Walking holiday option which we know has high appeal. In contrast though to many other English walking holiday propositions, this offers easier, typically flatter more accessible walking routes.
  - Driving-based routes. Nearly half of visitors from Germany and Netherlands are willing to hire a car in England, so this option should have wide appeal too.

### Content

- The three example itineraries match well to the types of activities and experiences that inbound travellers from Netherlands and Germany are looking for.
- The challenge with the smaller authentic experiences (pubs, restaurants, accommodation providers) will be to ensure that quality standards are maintained and the travel trade and potential visitors trust the recommendations included within the itineraries. Close attention to reviews will be important as well perhaps as having alternative destinations identified in case there are any issues.

### Duration

- As noted the example itineraries are currently 7 and 14 days. Whilst the aim is to encourage visitors to stay longer, it's perhaps important to also include shorter options for those who are unable to stay longer and/or who which to get a taste of the waterways experience on a first visit. Provided the visit goes well, these people may well be persuaded to return in the future for a longer visit.

### Flexibility

- Providing options within itineraries may provide both a wider appeal and a sense of spontaneity for those who do not want to be too constrained. 'Free time' to explore waterside areas, choices of dining options (e.g. curry or local 'pub' food), choices of attractions (close to waterside or a taxi ride/walk away) may add interest without adding too much complexity.

## Key take-outs and opportunities (2)

### Making the most of Regional Opportunities

- As noted in the bid, the ACE Cultural Destinations grant provides support for Midlands cultural destinations. Ironbridge already being a UNESCO World Heritage site and the many other award winning destinations in the area provide a strong basis on which to build content for the trade and for travellers.
- Awareness of, and interest in, the region will likely grow still further with the recent announcements of Coventry as the 2021 City of Culture and Birmingham's confirmation as the 2022 Commonwealth Games host city.
- Both these awards will bring investment and focus to the region that will help build interest and appeal in Midlands-based holidays.
- They perhaps also help to tackle any concerns around the urban parts of the waterways itineraries, by highlighting positive aspects and attractions in those cities.



### Gateways & Transport

- Whilst focus is rightly on Midlands airports as the primary gateways, there is potential to draw visitors from London gateways, either as a more convenient inbound point of entry or as a two-centre holiday including London and the Midlands. Road and rail connections to the region are fast and efficient and so London start-points are feasible too.
- However, it is also important to remember that English is not the first language of these visitors and our transport system is not always easy to navigate. It will therefore be important to provide the right level of guidance either through 'written' guides available in printed or digital formats and/or ground handlers/call centre support. For example on the driven route make sure simple instructions are provided for finding and using car parks. For the narrowboat hire it will be important to provide clear public transport routes or ideally offer a collection service from the main gateway or transit point (Birmingham Airport, Birmingham International/New Street).

## Key take-outs and opportunities –(3)

### Communications & Content

- Visual stimulus will likely play an important part in the communication of the uniqueness of the offer. Whether that is the waterways themselves, the locks, the views or the attractions that are in the itineraries. Together they will provide a much better understanding of the experience and ensure potential visitors see the quintessential England that they will experience.
- In addition to providing this stimulus for the rural parts of the itinerary it will be equally important to provide imagery for the more urban parts too. This will both illustrate the vibrancy of the cities and also reassure around safety of travelling through the city waterways.
- The Midlands is not that well known for tourism, aside from some iconic destinations (Ironbridge, Stratford etc.). Building awareness of the less well-known destinations will be important. For example Coventry might initially be linked to the Cathedral and Transport Museum, but less well-know attractions such as Fargo or events such as Motofest might be built in to itineraries.

### Accommodation Options

- The accommodation listed in the example itineraries adds to the experience by being 'interesting' in it's own right, either through the history of the building, its location or the style of service offered. As noted previously it is important to monitor quality standards of these smaller independent providers and to bear in mind the reservations that the trade has around hotel standards in this country. Regular reassurance may be needed through reviews, photos, guest feedback etc.
- Beyond hotel accommodation, consideration could be given to more unique accommodation options that still have a waterways theme e.g. staying in a lock-keepers cottage or a night on a canal barge or riverboat for those travelling by foot or road. This type of option would add to the overall experience and offer something unique and memorable.

### In-holiday support

- As noted earlier it is important to provide support with transport arrangements. It is also important to have trusted support available for other aspects of the visit:
  - Technical help for those hiring a narrowboat. Where possible local language help would ideally be accessible.
  - For those on the walking tour, the luggage movement service could also provide other support – advice, restaurant bookings etc. Again it would be ideal if this support can be provided in local language as well as English.



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# Appendix

- Data sources

## Links to data sources

- 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/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/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_150_-_researching_and_planning.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/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](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://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](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)
- DEF 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](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_initial_summary_report_v6_310816.pdf)
- VisitBritain Segmentation, 2017
- Inbound consumer sentiment research
  - [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer\\_sentiment\\_research\\_for\\_website.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.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](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/the_future_travel_journey_toolkit_final.pdf)
- VisitBritain Researching and Planning Research, 2016
  - [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_150_-_researching_and_planning.pdf)
- VisitBritain Beyond London, 2013
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- Discover England Lifestage Report
  - [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover\\_england\\_life-stage\\_report\\_v5.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_life-stage_report_v5.pdf)
- Destination Type Summaries March 2017
  - [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover\\_england\\_destination\\_towns\\_v4.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_destination_towns_v4.pdf)
- VisitBritain Market and Trade profiles
  - <https://www.visitbritain.org/markets>
- DEF Visitor Research Qualitative 2017
  - [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def\\_research\\_-\\_qualitative\\_research\\_reportv2.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def_research_-_qualitative_research_reportv2.pdf)
- Technology and Social Media, 2016
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- England Occupancy Survey August 2017
  - [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/eos\\_august\\_2017\\_final.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/eos_august_2017_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_initial_summary_report_v7_140817.pdf)



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