



Discover England Fund Research Summary Report

The Gourmet Garden Trails of England



January 2017



Contents

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



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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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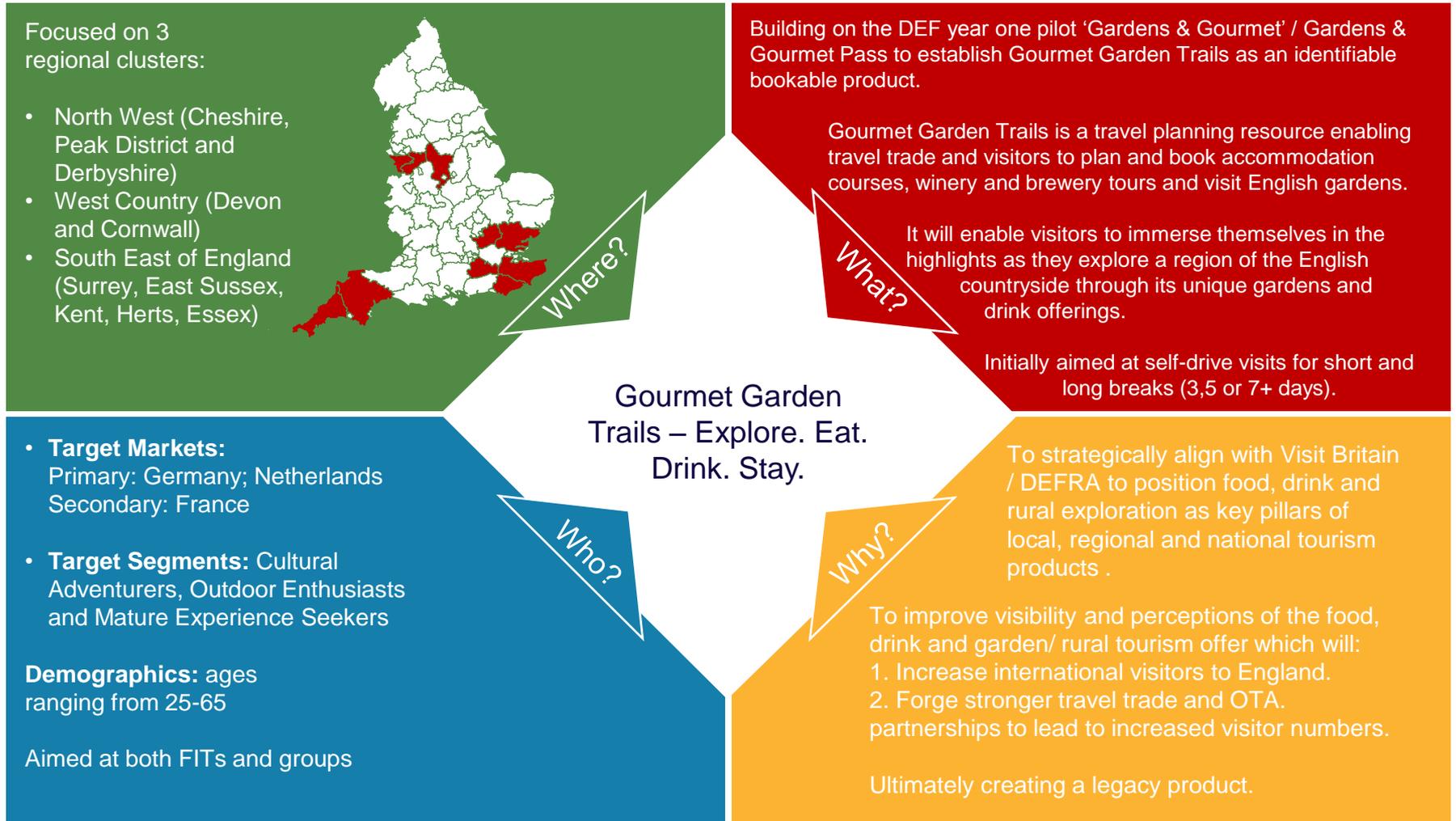
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Insight

Introduction



Project overview



Product proposition and branding

Proposition

Gourmet Garden Trails of England is a **leisure travel planning resource enabling travel trade and visitors to plan and book** accommodation, courses, winery and brewery tours and visits to English gardens. With Gourmet Garden Trails, we **aim to bring awareness to travel trade and inbound visitors to enable them to book unique, immersive rural experiences** 'off the beaten path' that have a real feel for all the beauty and culinary experiences that England has to offer.

The Gourmet Garden Trails of England **enable visitors to immerse themselves, in the local highlights** as they explore a region of English countryside through its gardens and food and drink. Visitors will **discover the joys of rural England through the beauty of its niche heritage and country gardens, and the artisanal food and drink** that showcase the tastes of locally-grown produce.

The Gourmet Garden Trails of England will **take visitors off the beaten path and be the gateway to the colours and flavours of rural England**. The journey is about **discovery, immersive experiences, fun and learning, 'living like a local'** and enjoying rural England by providing access to previously unknown niche dining experiences, farmers markets, foraging and cookery course experiences and 'hidden gem' gardens as well as the country gardens of historical significance.

Not only will Gourmet Garden Trails **provide 'insider' information to rural and dining experiences**, it will also provide a **comprehensive selection of accommodation** from luxury boutique hotels and B&Bs, to yurts and camping options, thereby enabling visitors to plan a journey that addresses both their interests and budget.

Draft Brand Model – Key Themes



explore. eat. drink. stay.



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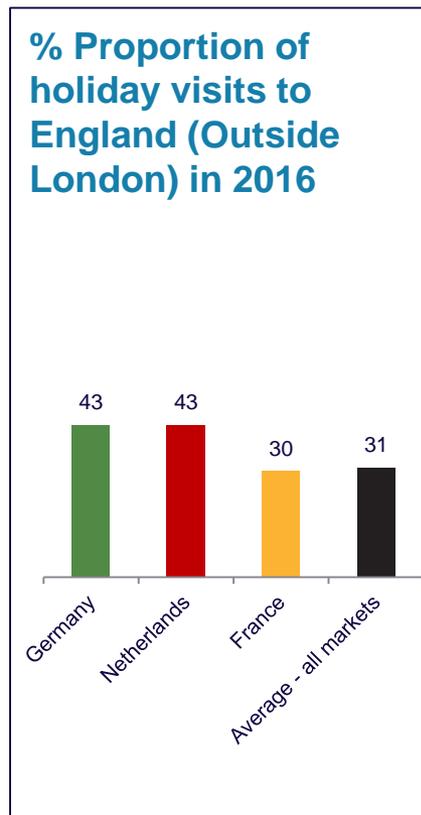
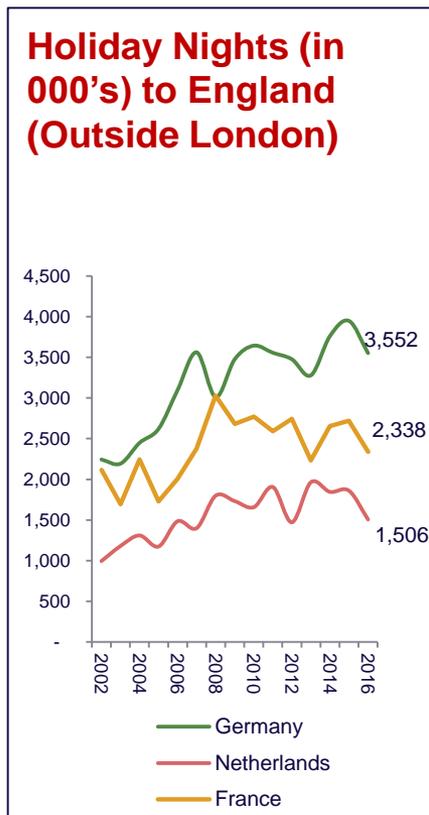
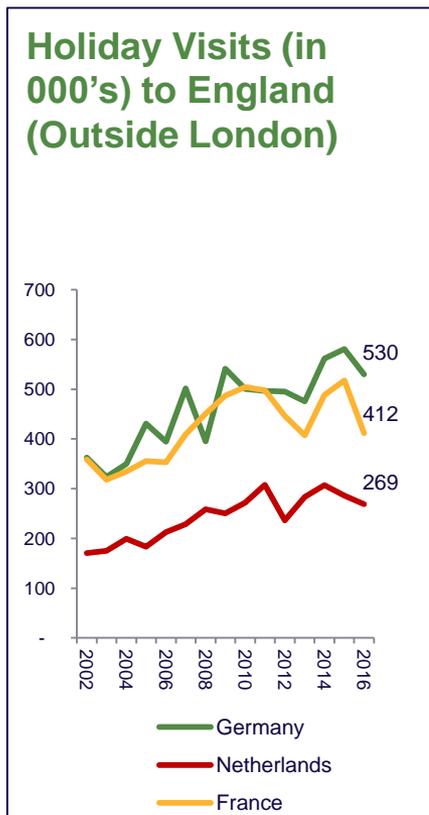
Insight

Current Trends & Challenges



Current Inbound Travel Trends to England (outside of London)

- Less than a third of all trips to England 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. The biggest challenge is to persuade visitors from France to venture beyond London.



- 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 Germany and Netherlands are more likely than average to travel beyond London.
- France:** presents a significant challenge as visitor volumes are showing some decline as are the number of nights. The French are also the least likely to travel beyond London.

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

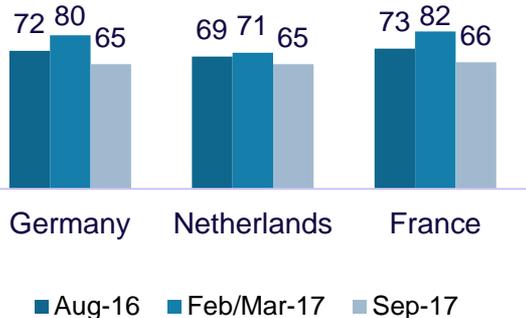
Geopolitics: Safety / Security

“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 (%)

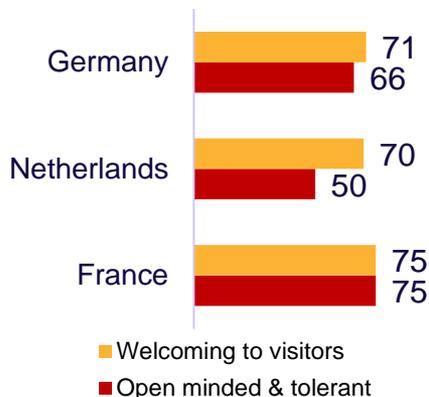


Perceptions of Britain

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 (%)

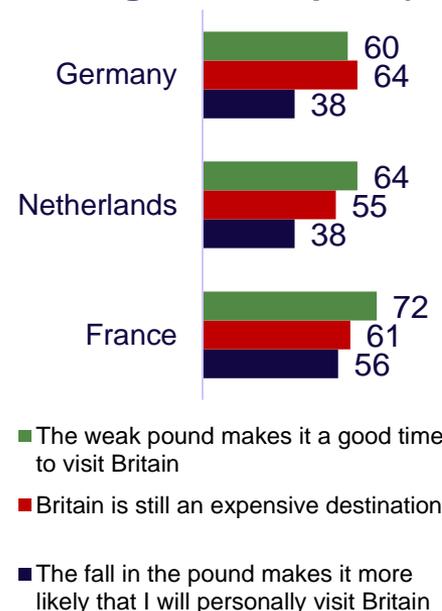


Exchange Rate

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
- France – Ireland, Spain

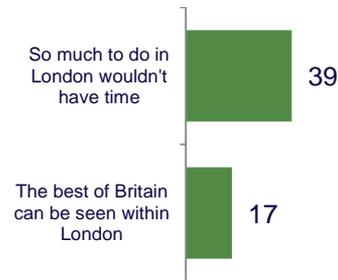
Reasons for not going beyond London (%)*



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 (%)*



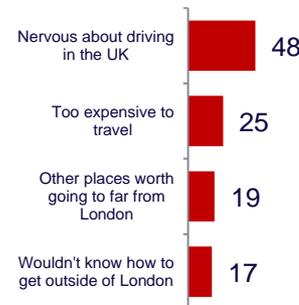
Growing inbound travel to England’s regions

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

1. Address Transport concerns

- Providing clarity around journey planning around regional England is key – especially given the focus on self-drive itineraries.

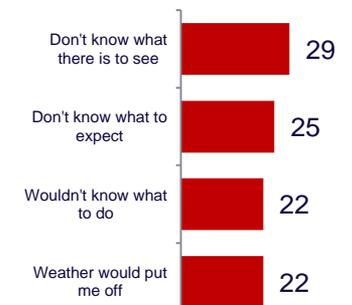
Reasons for not going beyond London (%)*



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

England beyond London is rarely known or understood

4 main themes in the barriers to travelling beyond London:



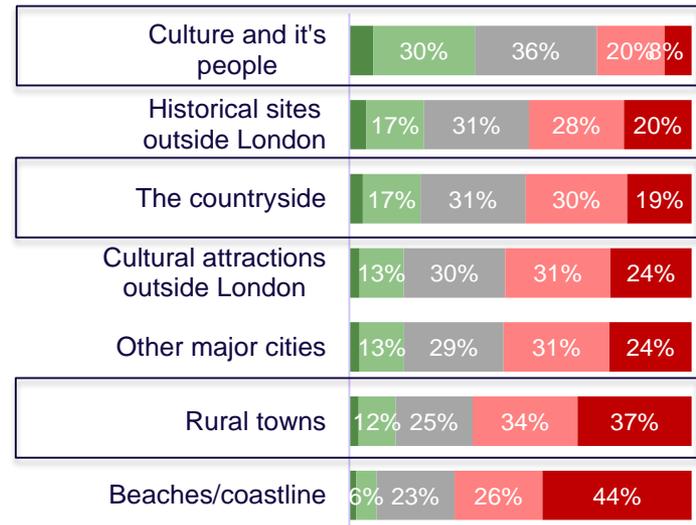
Implications

- Almost all these barriers can be addressed through strong communication of the offer beyond London and the accessibility of the area.

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, unique food and drink offerings).

What do you know about Britain outside of London?

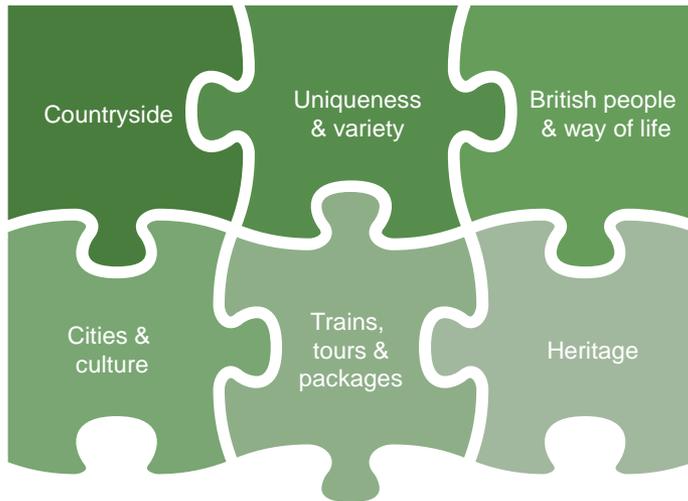


■ Know a great deal ■ Know nothing about it



However, the triggers to travel beyond London, tie in well with themes included within the Gourmet Gardens Trail proposition

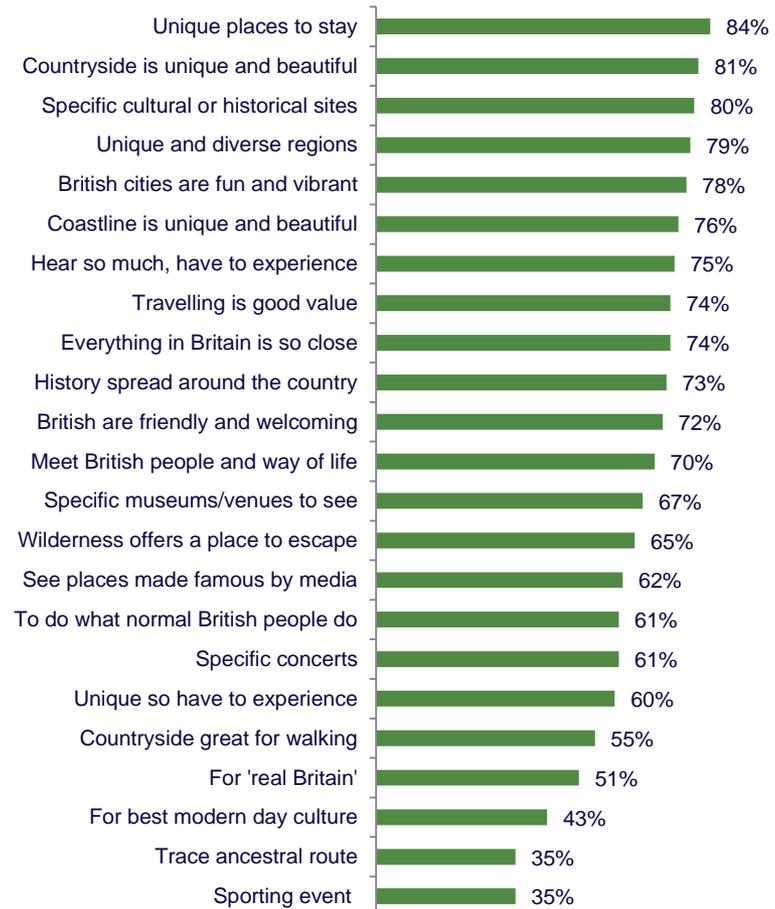
Triggers to go beyond London



Implications

- Main reasons to travel beyond London are ones that Gourmet Gardens can capture in the itineraries being developed.
- Working with destinations and accommodation 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



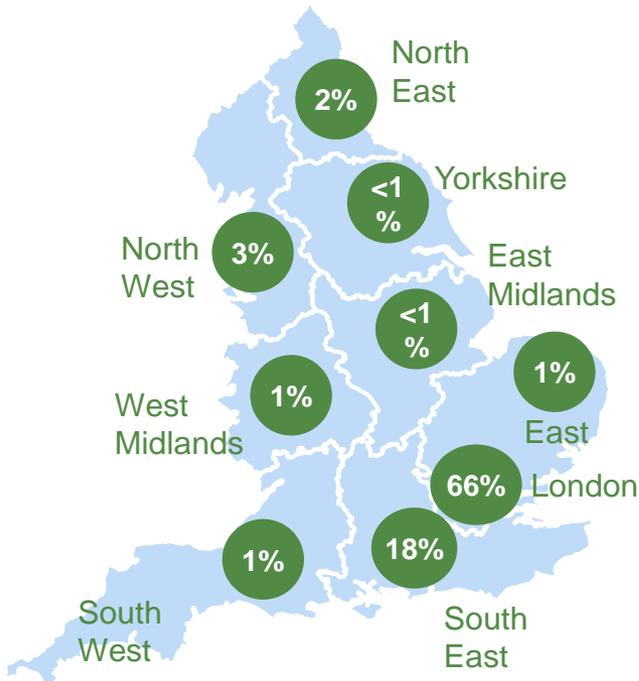
A red convertible car is driving away from the viewer on a winding asphalt road. The road is flanked by lush green grass and trees. The scene is captured in a soft, golden light, suggesting early morning or late afternoon. The car has two people in the back seat.

How to optimise the
Gourmet Gardens
Trails Experience
Gateways and Transport

Currently, regional gateways do not attract a large number of holiday makers outside the South of England

- The majority of visitors to England enter through London or the South East – positive for the Southern clusters but a challenge for the Northern cluster.
- Air travel is the main mode of entry for the Germans and the Dutch – car hire partnerships will be essential to build into the proposition.
- That said, seaports are a popular way of getting to the UK from all the target destinations – and the tunnel / Eurostar are popular with inbound visitors from France.

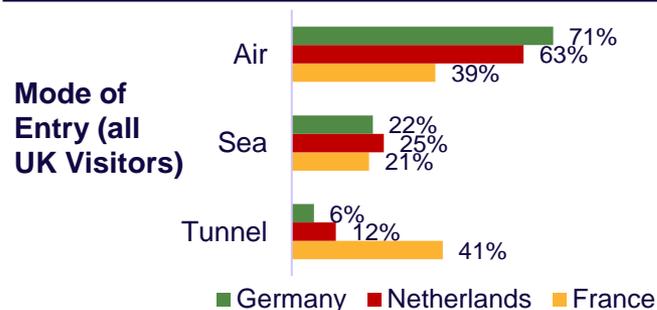
Gateways: Region of Entry (UK Holiday Visitors)



Mode of Entry (UK Holiday Visitors)

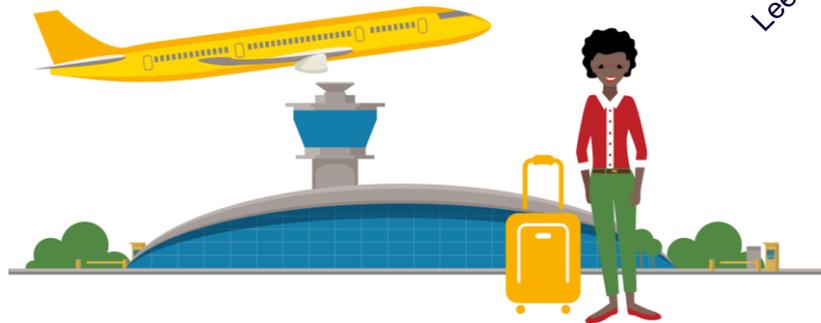
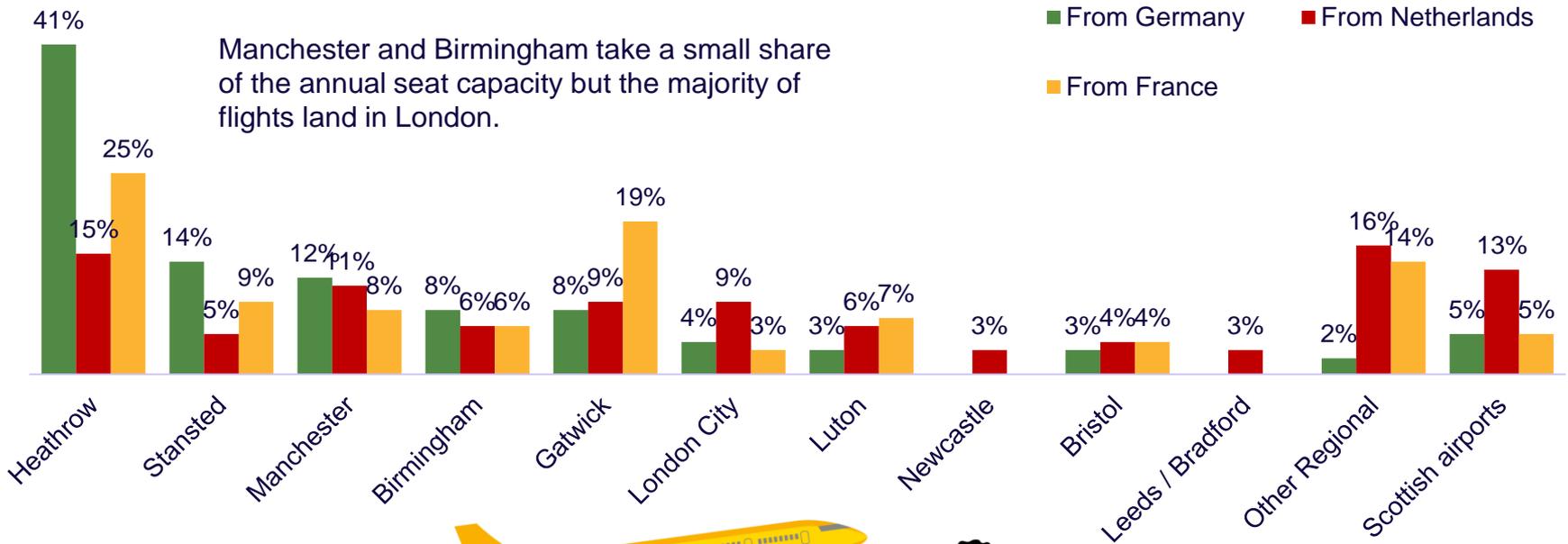


| | Main Gateways/ Opportunities Modes | |
|-------------|--|--|
| Germany | <ul style="list-style-type: none"> • Manchester • Stansted • Seaports | <ul style="list-style-type: none"> • After the main London airports, Manchester and Stansted (Essex) are key gateways |
| Netherlands | <ul style="list-style-type: none"> • Seaports • Newcastle | <ul style="list-style-type: none"> • Harwich to Hook routes main opportunity for the South |
| France | <ul style="list-style-type: none"> • Eurostar • Bristol • Gatwick | <ul style="list-style-type: none"> • Ebbsfleet / Ashford bring you in the heart of Kent |



Annual airport seat capacity shows the strength of south of England as the main gateway

Annual Seat Capacity (from target markets to the UK)



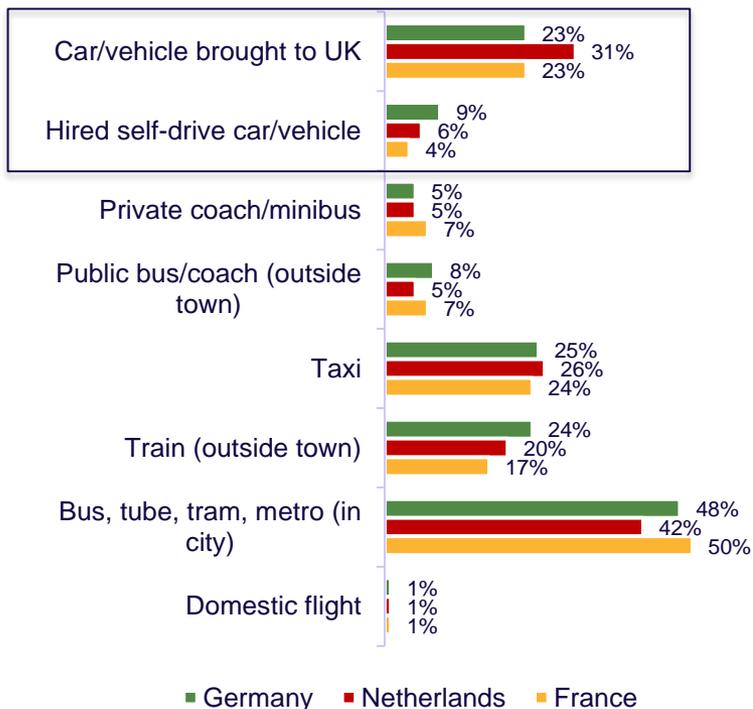
Source: Apex Rdc 2016: Non-stop flights only

Source: VisitBritain Market and Trade profiles

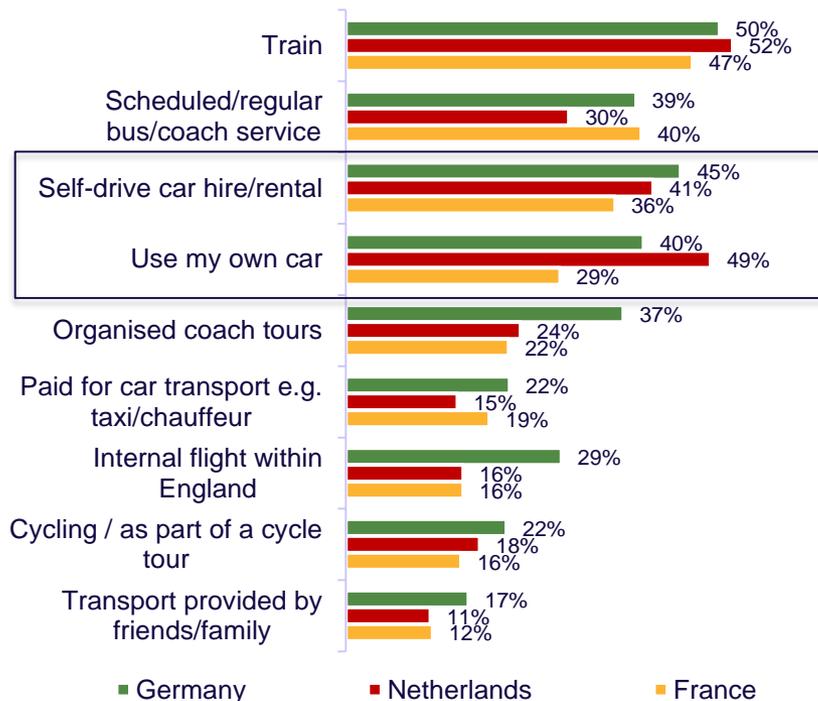
Positively, use and consideration of personal transport is quite high for the target markets. But consideration of car hire does not always lead to usage

- The Dutch are most likely to bring their own transport with them – it is slightly lower for the Germans and the French at around a quarter.
- While there is high consideration for car hire across the markets it does not always translate into actual usage – for example 45% of Germans considered hiring a car but only 9% did. This may suggest that visitors do not find it easy to book car hire but further exploration is required to validate this.
- Public transport is used and considered – however, given the suggested locations in the itineraries the ‘last mile’ may be too challenging.

Modes of Internal Travel in UK (all visitors)



Types of transport considered



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

Travel Trade have concerns around Transport & Accessibility particularly to regional England

These concerns span all forms of transport.

- **Lack of regional flights**
- **Seasonal lack of ferries** (increasing the challenge for off-peak growth)
- **Nervousness of driving**
- **Rail concerns** (prices, train quality & comfort, gaps in geographic coverage)

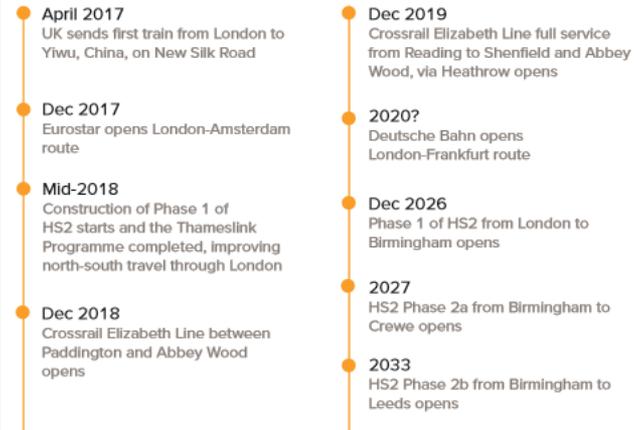
While these views may not reflect in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England opportunity and will not help with building traveller confidence.



Actions

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

Key (Proposed) Milestones for Rail Developments in the UK



Source: Euromonitor International

Short-term actions to address

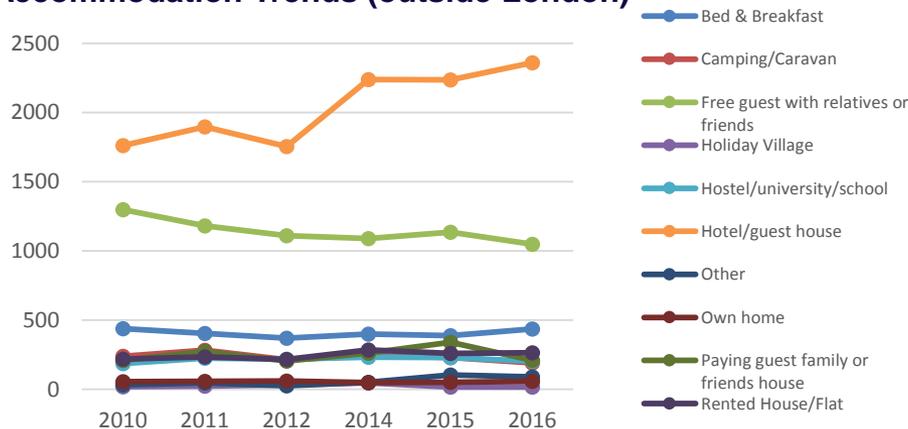
- Better accessible travel information for trade and travellers (routes, journey times, ticketing etc.).
- Greater language capability at gateways and key hubs.
- Integrated travel solutions focused on regional accessibility.
- Provide reasonable price options.



How to optimise the
Gourmet Gardens Trails
Experience
Accommodation

Accommodation is currently dominated in volume terms by mainstream hotels

Accommodation Trends (outside London)



- Accommodation is **not** a motivator for visiting England; Only 16% of visitors see the variety & quality accommodation as a motivator.
- Overall trend for England (excluding London) holiday visits shows the biggest increase is in hotels/guest houses.

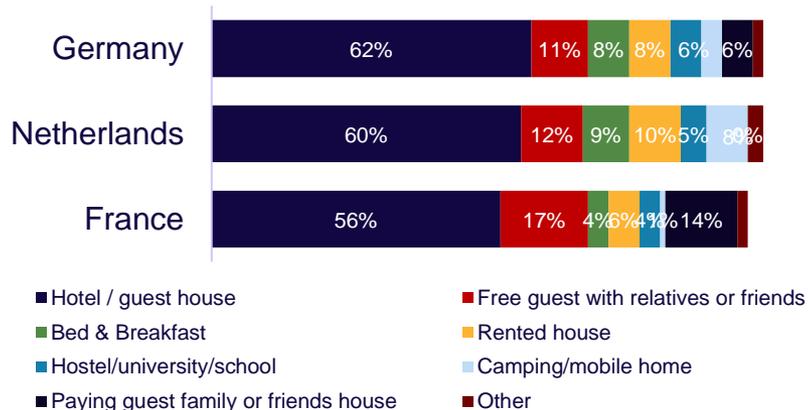
Booking channel

- Over half of visitors from target countries book their accommodation and travel separately (see later slides in booking section).
- Over half of accommodation bookings are made direct with the provider.
- Over 70% make that booking online.

Considerations

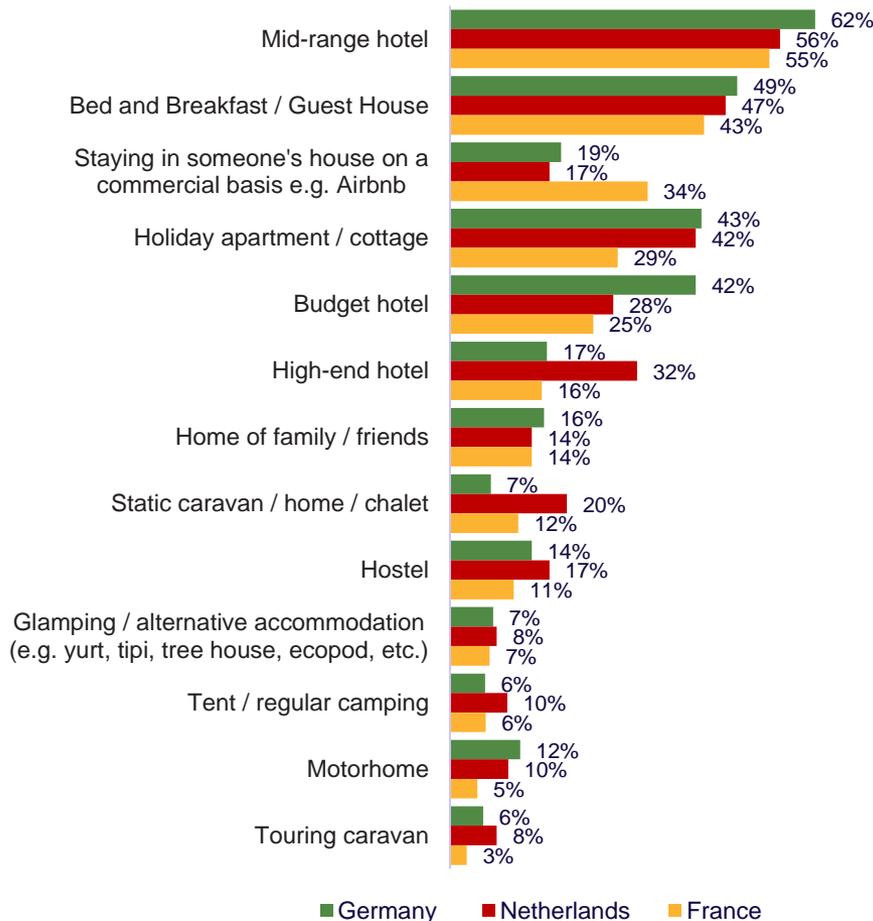
- Visibility online is key to the success of accommodation providers, for awareness, consideration and booking.
- This is both through their own online channels and through OTAs, DMOs, review sites etc.
- This is important for both large hotels and smaller independents/alternative accommodation types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

Accommodation Type – All UK



Types of accommodation considered illustrates the potential for a range of diverse options that could be included within the proposition

Types of accommodation would considered as part of a holiday to England



- Whilst hotels are overall the most considered accommodation option, there is clearly potential for others.
 - Interest in Airbnb is highest in France.
 - Germans and Dutch are the most likely to consider self-catering.
 - The interest in camping / caravans is highest among the Dutch and it is reasonable to assume this will grow particularly as glamping options increase.
- Mid-range hotels are most popular but there is still a significant minority interested in high end (especially Netherlands) and/or budget hotels (Germans).
- Maximising this opportunity for diverse accommodation for inbound travellers will require a focus on visibility and accessibility to the travel trade and independent travellers. It will also be important to ensure quality standards are consistent and maintained.

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

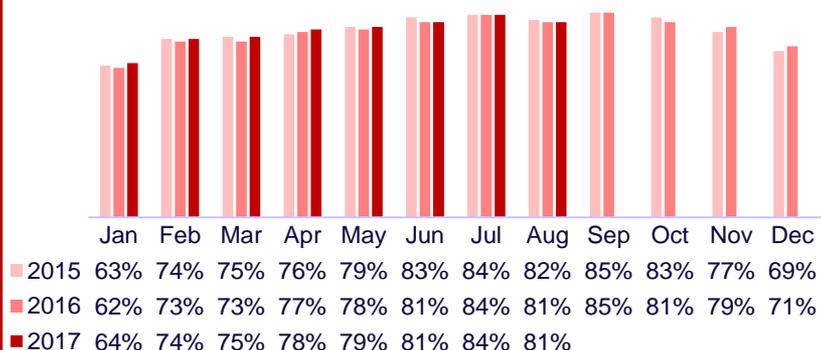
The Travel Trade put forward a number of potential actions to address the accommodation concerns:

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

Accommodation capacity is also 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.

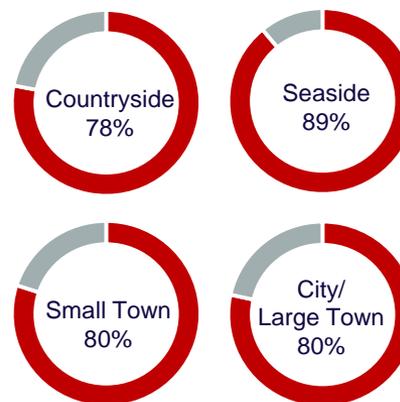
Travel trade say there is a lack of willingness from many hotels to provide fixed rates and allocations more than 6 months in advance.

Availability & Capacity by type and location

Highest August occupancy areas:

| | |
|-------------------|------------|
| South West | 87% |
| South East | 83% |
| North West | 80% |

This amplifies the Travel Trade concern as they tend to favour the South of England.



August occupancy highlights a challenge particularly for seaside accommodation.

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



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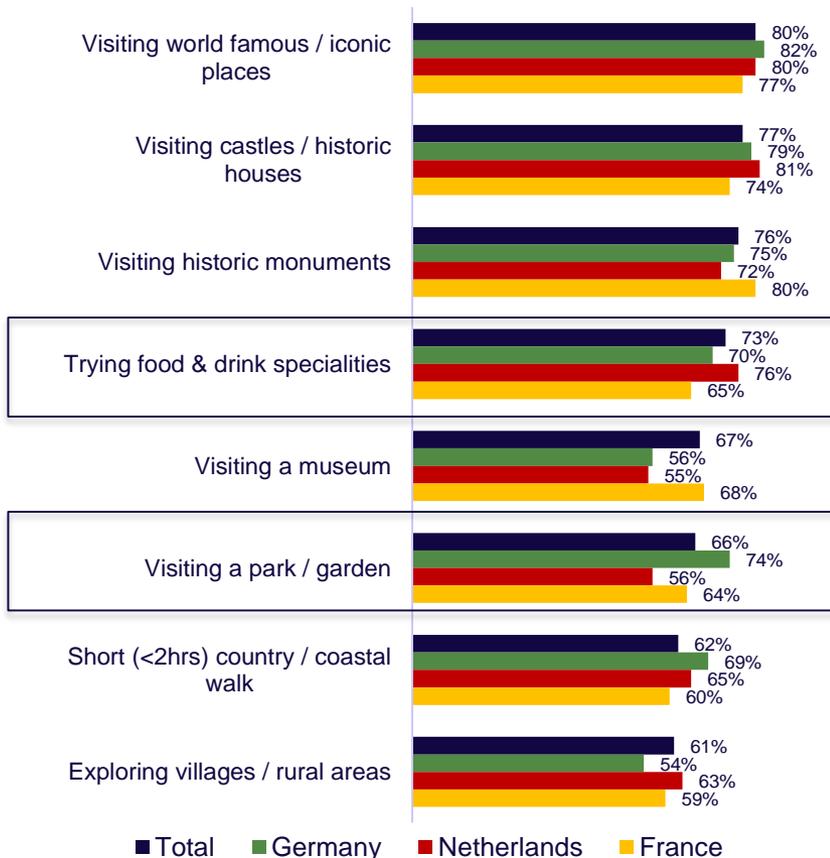
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Insight

How to optimise the
Gourmet Gardens
Trails Experience
Activities

Trying food & drink specialities and visiting parks and gardens have high appeal across the target markets

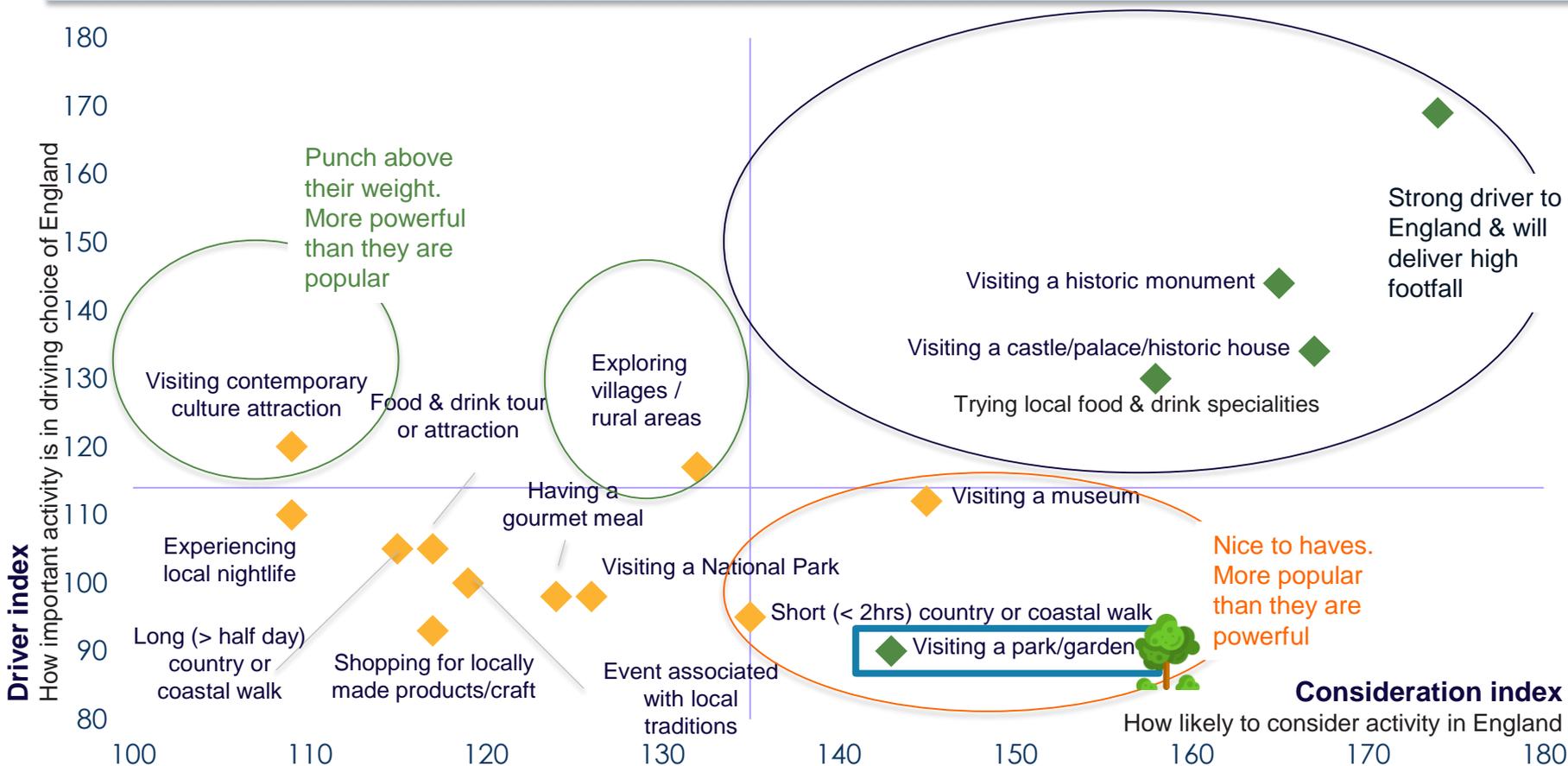
Top 8 activities considered in England



- Combining food with gardens / historic places is key as food and drink is rarely the main reason to visit Britain (5% of 2015 visitors) based on the most recent data available.
- Trying local food & drink specialities is a pull across all markets. Visiting parks and gardens is also appealing, particularly among the Germans.
- While visiting Parks and Gardens still ranks within the top 8 activities considered among those from the Netherlands, it is less appealing compared to other activities i.e. such as exploring villages / rural areas and have Gourmet meals (see next slide for more details).
- This suggests **leading with ‘Gourmet’ in the branding rather than ‘Gardens’ a sensible approach**, particularly in the Dutch market.

Visiting parks & gardens is more of a 'nice to have' rather than a driver of a trip – further evidence for leading with 'Gourmet'

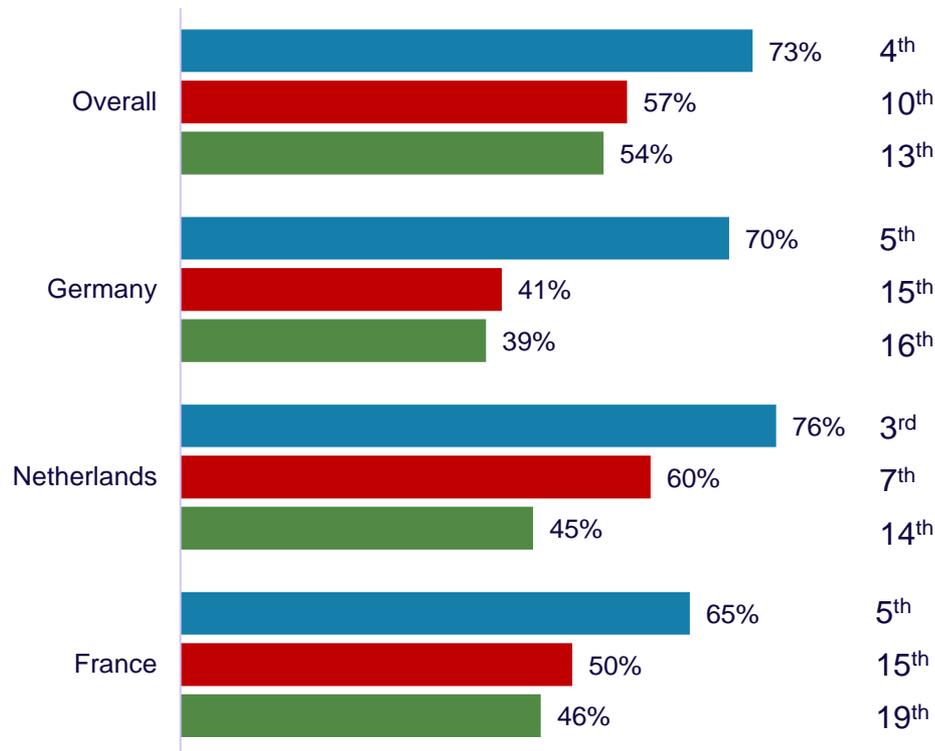
CONSIDERATION INDEX vs. DRIVER INDEX – TIER 1 & TIER 2 ACTIVITIES



Looking at food & drink activities in more detail highlights the subtle difference in consideration between *trying* and *taking a tour*

Food related activities considered in England

Rank* position



- That said, more than 2 in 5 from each target market would consider a food & drink tour or attraction.
- ‘Gourmet meals’ are more likely to appeal to the Dutch audience but again still considered among the French and German market (albeit ranks much lower than other activities).

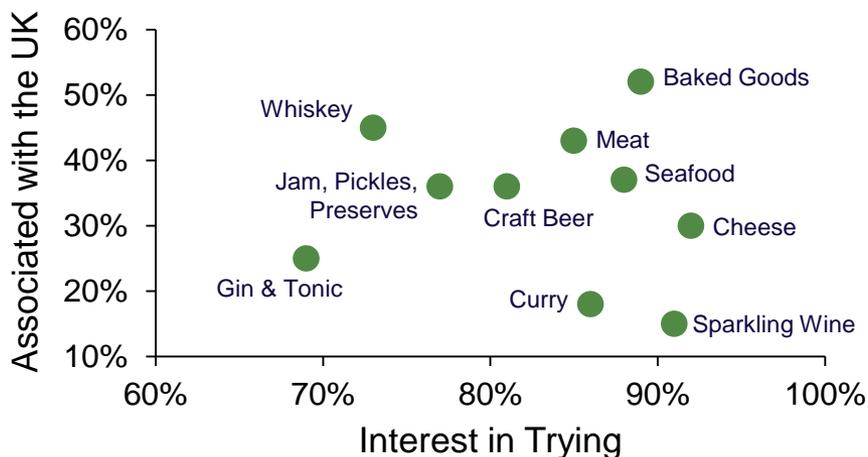
■ Trying local food & drink specialities
■ Having a gourmet meal
■ Food & drink tour or attraction

*Rank position among a list of 40 activities

There is high interest in trying a number of local food & drink specialities being considered by Garden Gourmet project

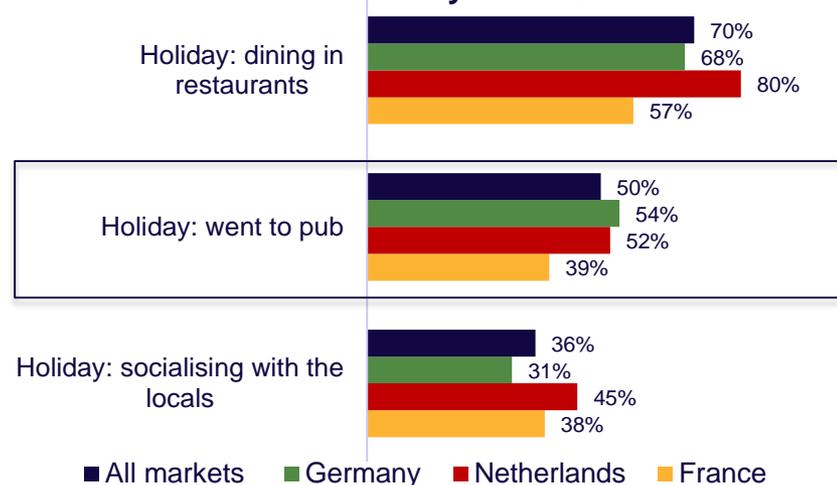
- In some cases, for example, sparkling wine and gin, there is relatively low association with the UK providing these.
- This relatively low association could be used in messaging to promote the uniqueness of the experience.

Local Food & Drink Specialist – Association with UK by Interest in Trying (all markets)



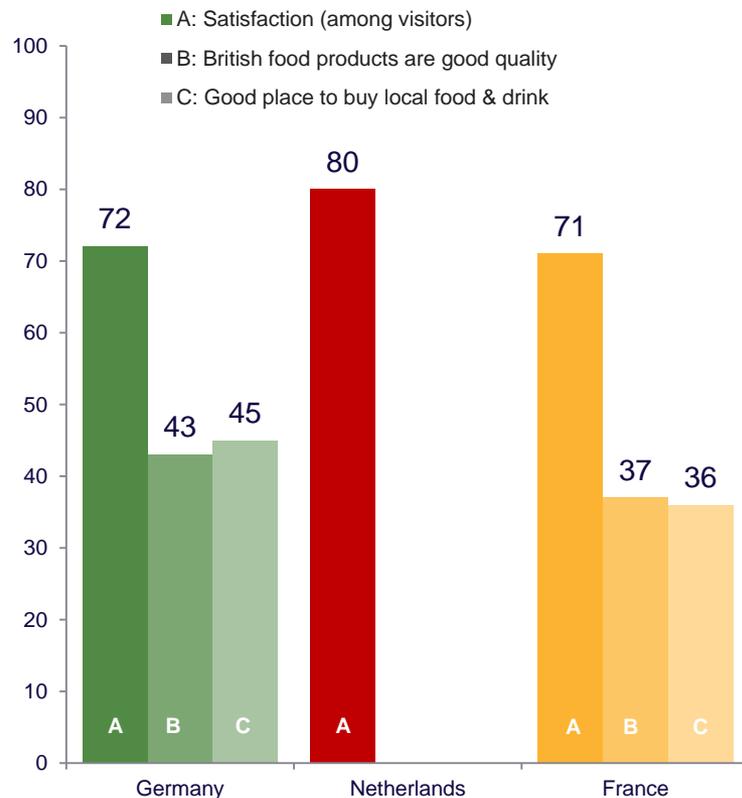
- Further data validates that the Dutch are more likely to want to have 'restaurant' experiences compared to the other markets.
- The inclusion of pubs in the offering is also appealing – particularly among the Germans and the Dutch.

Propensity to go to restaurants, pubs and socialise with locals whilst on Holiday in the UK



While satisfaction with food and drink among visitors is high, general perceptions of quality and Britain being a good place to buy them is much lower

Perceptions of food and drink in Britain (%)



- Perceptions of the quality of food are also a concern raised by the travel trade.
- Any provider on-boarded must be vetted before inclusion in the itineraries to ensure it does not impact the overall experience of the product.

Additional information:

Netherlands

- Celebrity Chefs (Jamie Oliver, Gordon Ramsey, Gary Rhodes, Rick Stein) have positively influenced perceptions of British cuisine among the Dutch.
- While coffee is an institution among the Dutch, they are fond of drinking tea and having a traditional afternoon tea while in Britain.

France

- Food is one of the great passions of the French people. French cooking tends to be highly refined and involves careful preparation, attention to detail, and the use of fresh ingredients. Food and drink quality will always be compared with what they get at home in France.

Source: VisitBritain Market Profiles 2017

Concept testing demonstrates some appeal of the proposition in the Netherlands but communication around flexible itineraries and the uniqueness is not currently cutting through

Wording Used in the Concept Test:

Discover England’s Colours and Flavours

Wherever you come from and whichever culture you have grown up in, the words “an English country garden” conjure up something truly special. However, researching and planning trips to go and see them can be difficult without insider knowledge...

‘England’s Colours and Flavours’ creates perfect trips to England that take in the best country gardens, along with authentic English food and dining, to create a truly unique holiday. Our customised garden-themed short breaks guarantee you’ll find the “hidden gems” and have the trip of a lifetime.

Our unique listing of beautiful gardens is combined with a range of high quality boutique hotels and B&Bs, as well as rich, authentic English dining experiences in an easy-to-use bespoke online and mobile planning tool and service. “England’s Colours and Flavours” gives you the inside knowledge, maps and driving directions for you to explore your own path, or choose pre-selected itineraries, to ensure you get the best of English gems

“England’s Colours and Flavours” - makes English gardens easy.

Positive take-outs

- Visit places you couldn’t previously
- Saves time and stress out of organising a holiday
- Associations of nature peace and relaxation

Discovering new things, local habits

Rural setting and beautiful gardens

Visit the concept of staying old English gardens and authentic food.

Concerns

- Not seen as unique or unique to England
- Ease of getting around
- Lacks excitement – fixed itinerary
- Pricing

That it is fixed

If it seems to be falling and there will not be so much to see.

Probably the price. The gardens are very expensive.

A few gardens yes, but not every day 1 or more



XV

Insight

A close-up photograph of a hand planting a seed into a hole in dark brown soil. Several other seeds are scattered on the surface of the soil. The background is blurred, showing more soil and some green grass.

How to optimise the Gourmet Gardens Trails Experience Itineraries

Given the gateways of entry into the UK, it is not surprising that Southern England has a higher proportion of inbound visitors from the target markets

- Given this, the North West cluster will require stronger communications to encourage visitors.
- The Gourmet Gardens team may consider targeting the products in the South to first time visitors and those in the North to repeat visitors who may have already visited the South regions.
- Current visitor volumes to cities / towns (in brackets below) may also assist the team in building itineraries in close proximity to these locations – perhaps working with other DEF projects to maximise the final proposition to the trade.

Top cities / towns stayed in for the North West:

- Manchester (268K)
- Liverpool (198K)
- Chester (42K)

| IPS 2013-2015 | DE | NL | FR |
|---|----|----|----|
| % of inbound visitors visiting North West | 5% | 5% | 3% |

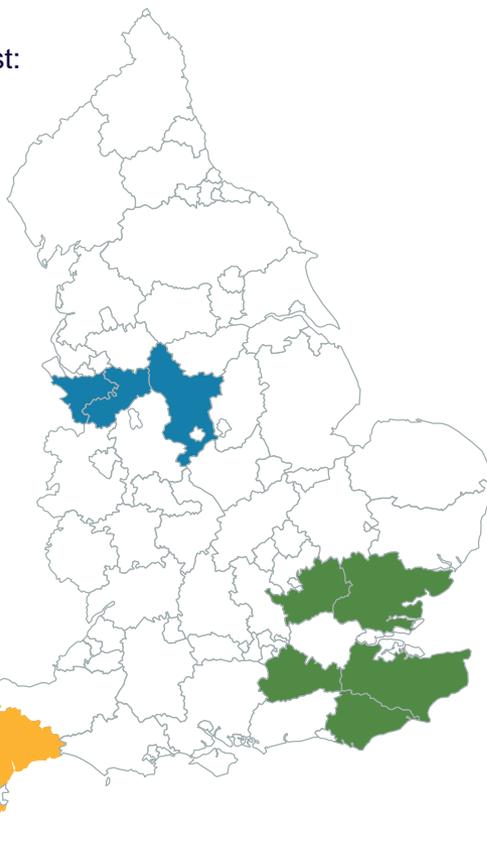
North West– Cheshire, Peak District and Derbyshire 2

| IPS 2013-2015 | DE | NL | FR |
|---|-----|-----|----|
| % of inbound visitors visiting South West | 16% | 13% | 7% |

West Country – Devon & Cornwall 1

Top cities / towns stayed in this region:

- Exeter (64K)
- Plymouth (44K)
- Torbay (36K)
- St Ives (36K)
- Penzance (34K)
- Newquay (34K)
- Falmouth (29K)



Top cities / towns stayed in this region:

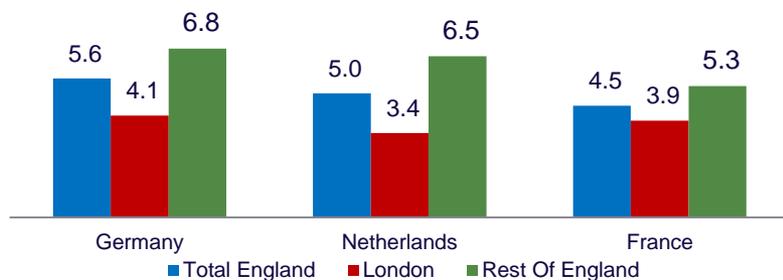
- Hastings (99K)
- Canterbury (99K)
- Eastbourne (74K)
- Dover (36K)
- Folkestone (30K)
- Maidstone (31K)
- Tunbridge Wells (25K)

| IPS 2013-2015 | DE | NL | FR |
|---|-----|-----|-----|
| % of inbound visitors visiting South East | 22% | 23% | 16% |
| % of inbound visitors visiting East | 5% | 7% | 4% |

South East of England – Surrey, East Sussex, Kent, Herts and Essex 3

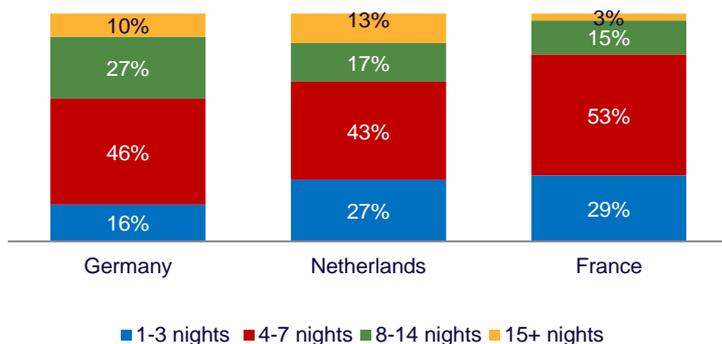
The average length of stay across all markets in regional England suggests shorter itineraries are more likely to be favoured

Average number of nights stayed in England (2015)



- 7+ day itineraries are less likely to appeal with the target markets, especially the French who typically stay in England for a much shorter time.
- The concept test among the Dutch also highlighted that shorter trips are more likely to appeal.
- 3 or 5 day **example** itineraries are likely to have more appeal but the Gourmet Gardens team should also consider itineraries showcasing day trips.

Duration of stay in England (2015)



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

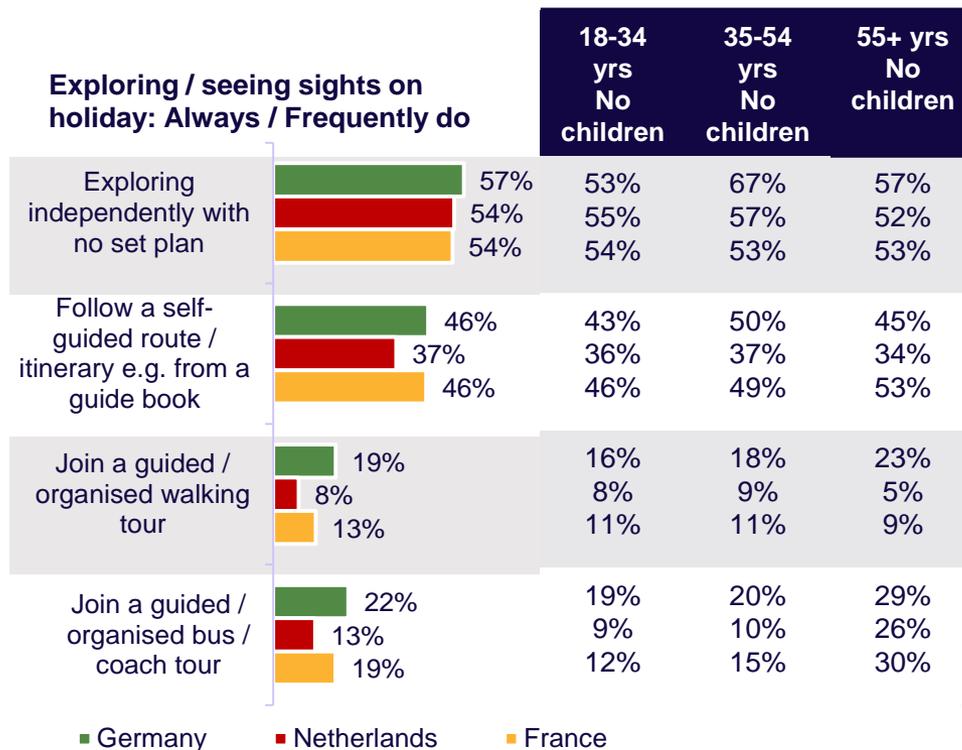
Percentage of respondents who selected 'Completely interested' (2014)

| | Germany | France |
|------------------|------------|------------|
| Off beaten track | 64% | 69% |
| Day trips | 65% | 61% |
| Full guided tour | 39% | 45% |

Note: no data available for Netherlands

Source: Anholt GfK NBI 2015

There is appeal to across all market for following a self-guided route or itineraries



Source: DEF Themes and Activities Research 2017

- Those in Germany and France are slightly more likely to have followed a self-guided route / itinerary than the Dutch – but it is still relatively high among the Dutch.
 - There are age differences but the size of the market is still healthy.
- When planning itineraries it is worth considering the following:
 - Gateways used – typically visitors only want to travel 2-3 hours from their original entry point.
 - Address the nervousness of driving among some visitors (40% of Germans and 49% of French state they would be nervous about driving*) – clear signage, maps and journey information (times and clear routes) will be essential to reassure the nervous drivers.

Developed itineraries highlight the overlap with some other DEF projects i.e. Chester, Heritage Cities. Partnerships should be considered.

Day one – Arley Hall & Gardens & Norton Priory

Morning: Begin your tour of Cheshire's Gardens & Gourmet venues with an exploration of the gardens surrounding the 500-year old Arley Hall (1).

Afternoon: You might like to pop in to the Gardener's Kitchen to try some recipes that were developed at Arley Hall before heading off to Norton Priory (2), where you can wander the gardens and ruins of Europe's most excavated monastic site.

Perhaps stay overnight in the Roman city of Chester (3).

Day two – Chester & Carden Park

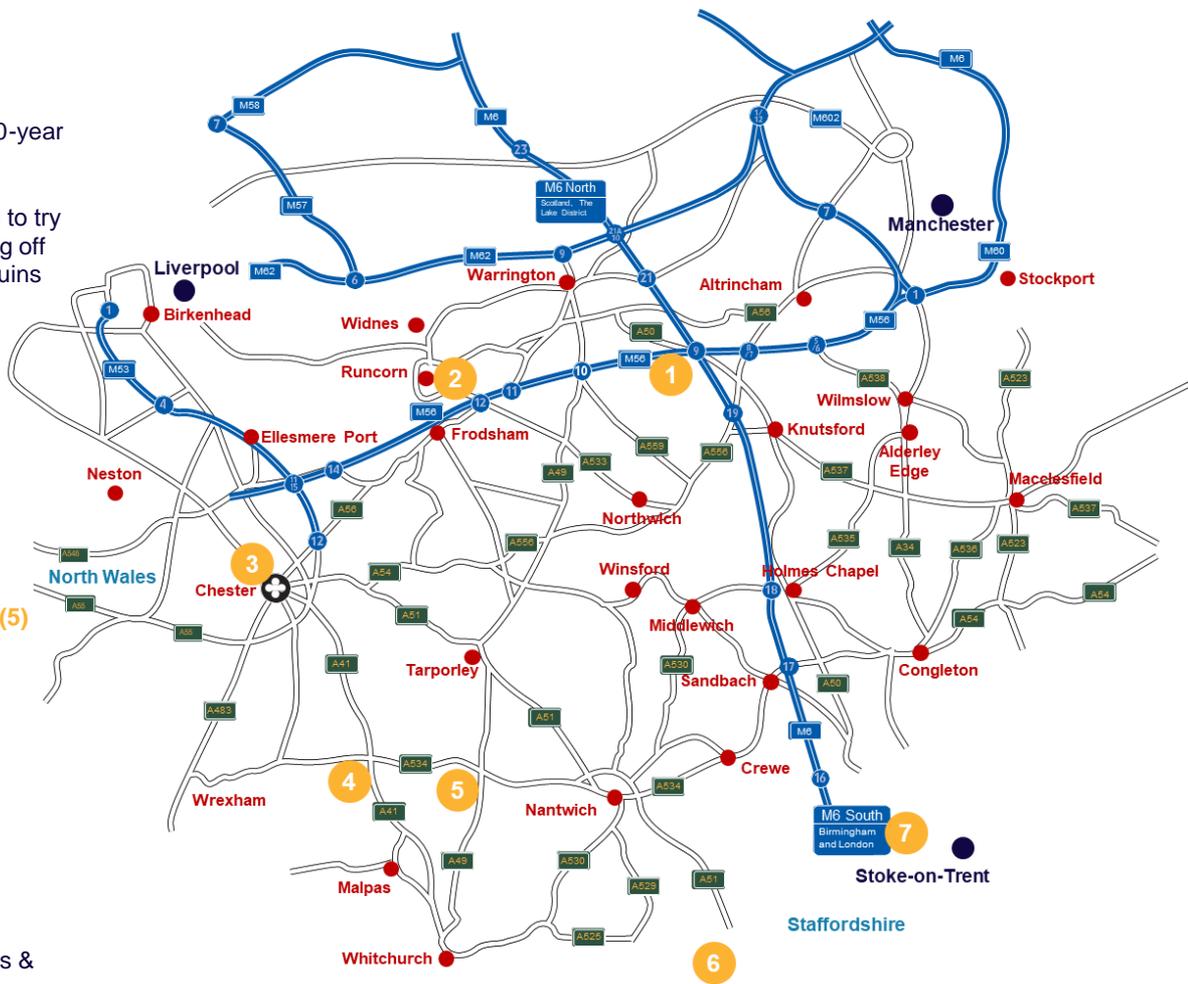
Morning: You might like to spend the first part of the morning exploring Chester's historic city centre (3) and browsing the shops and cafes then head to Cholmondeley Castle Gardens (4), considered one of the finest gardens in the north of England. After your visit, why not treat yourself to an indulgent English afternoon tea at the Carden Park Hotel? (5)

Afternoon: After sandwiches, scones and cake, head for the peaceful and quintessentially English Dorothy Clive Garden (6).

Day three – Trentham Estate

Morning & Afternoon: Spend a full day exploring the glorious Trentham Estate (7) – one of England's last remaining vast garden estates at 725 acres.

This is a sample itinerary. Take a look at the full list of Gardens & Gourmet venues in Cheshire

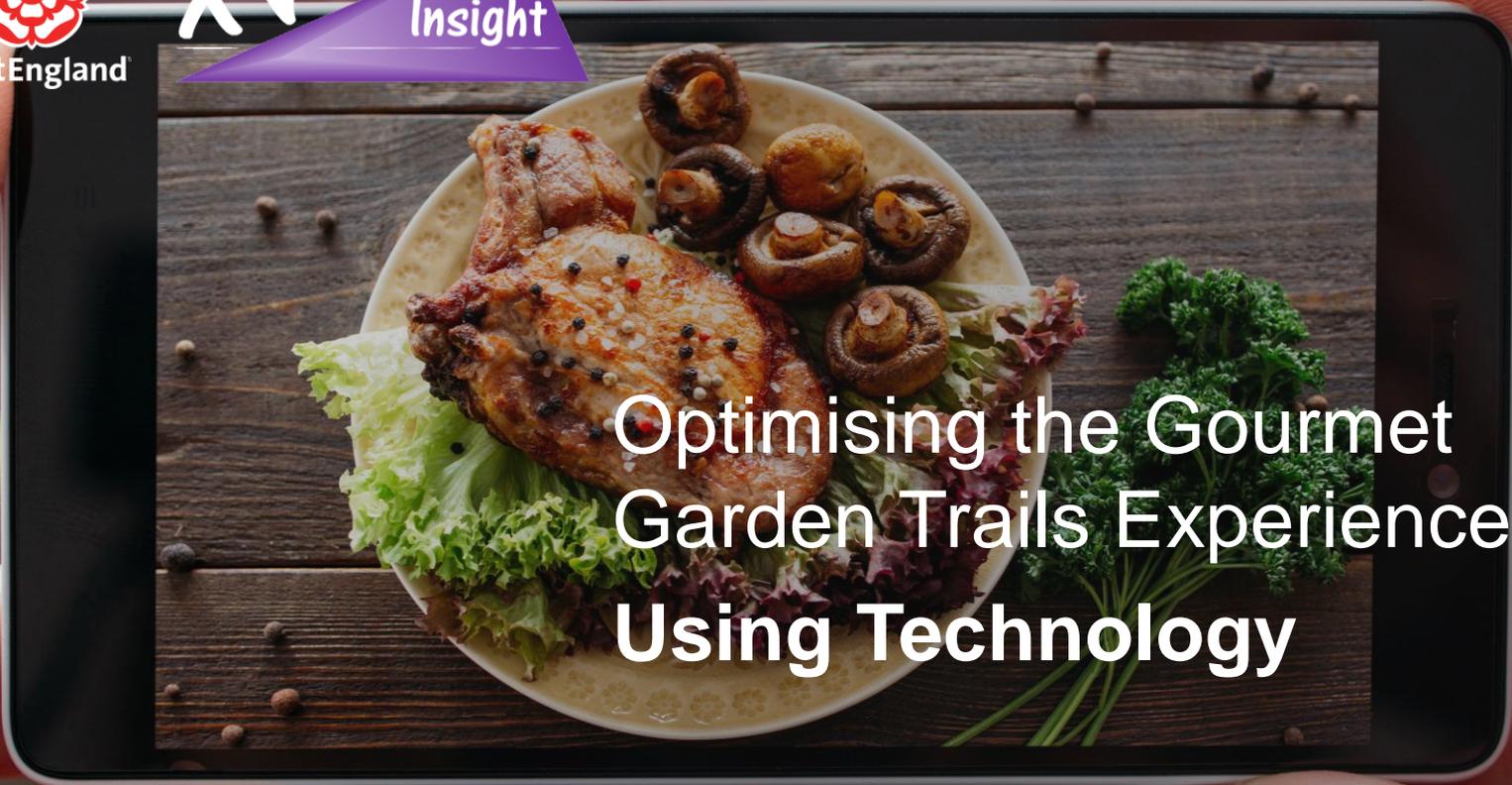




VisitEngland

XV

Insight



Optimising the Gourmet
Garden Trails Experience
Using Technology

Social media presence is now part of everyday life

Social Media Usage

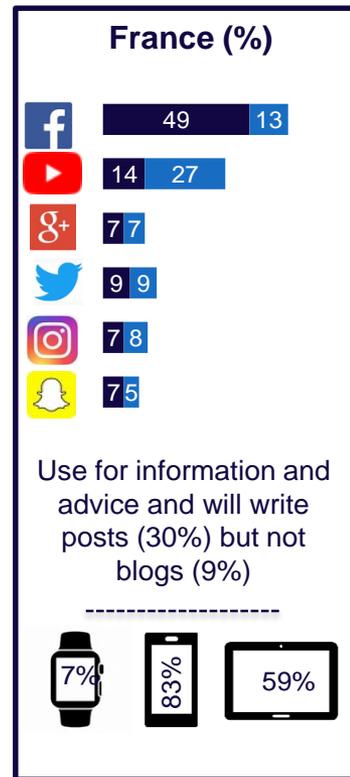
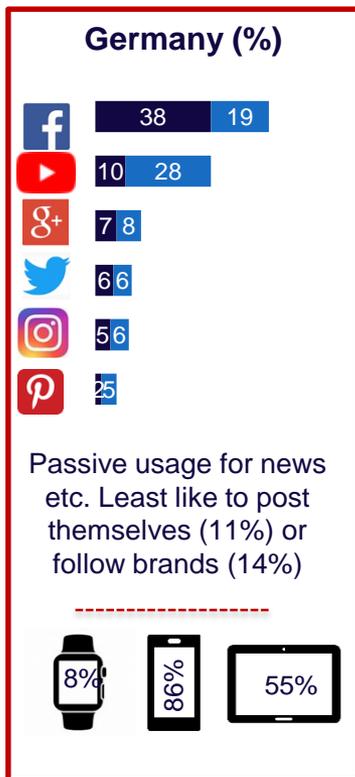
■ Daily ■ Weekly

Facebook and YouTube dominate.

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

Tech ownership

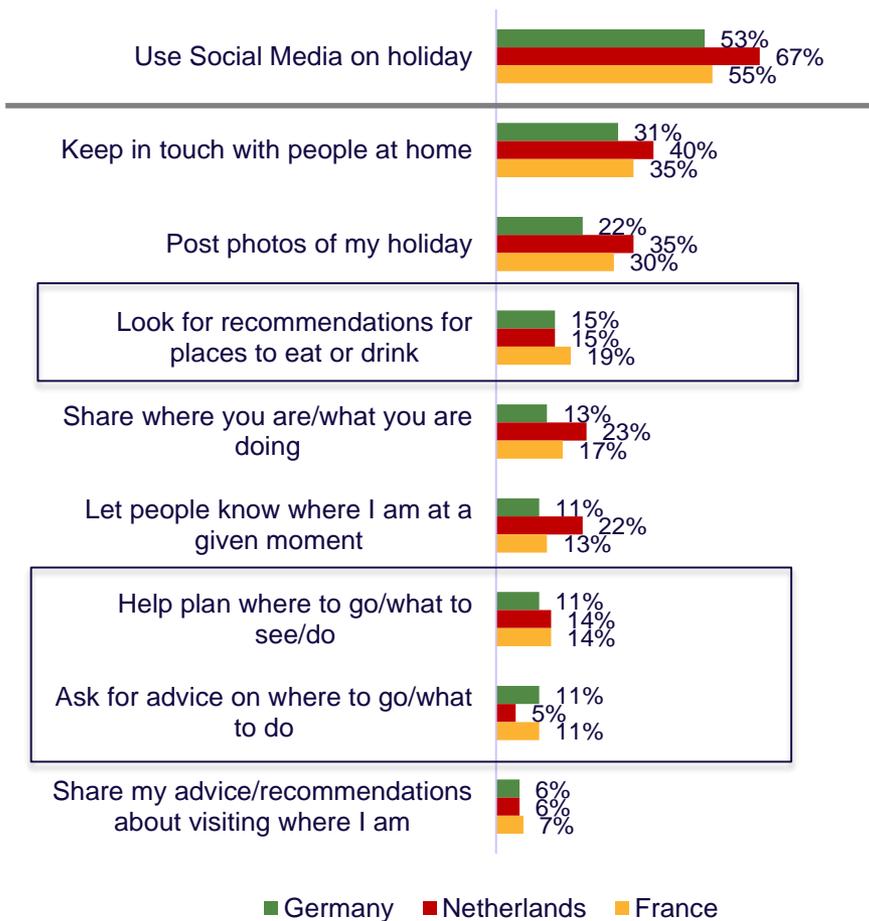
Smartphone is almost universal, over half have a tablet. Smart watches are owned by less than one in ten.



- 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.

The use of Social Media on holiday is high; and there is clear opportunity to engage with travellers through social media

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



- Just over half of Germans and the French use social media while on holiday. The Dutch have a highest usage at 67%.
- Whilst only a minority use social media for advice on both food & drink and activities / places to go, it is likely to grow in importance as a source of information for travellers.
- The opportunity to engage with travellers through social media is clear, as is the potential increased media coverage through traveller posts.

Staying connected is now an accepted part of the holiday experience for many. Accessing reviews is also an established behaviour

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

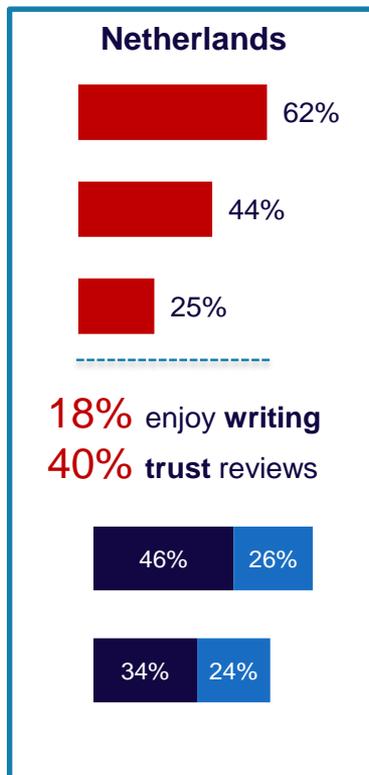
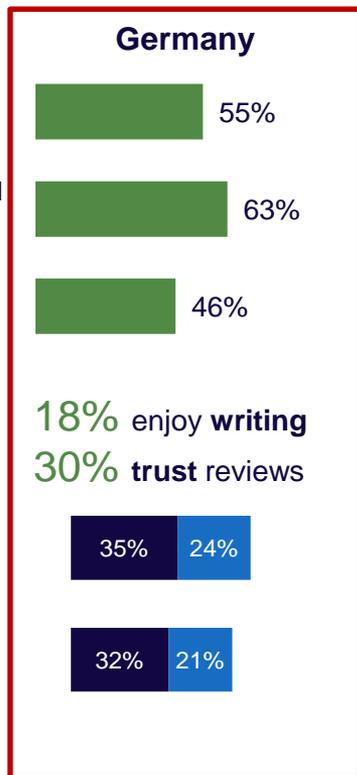
Reviews on holiday destinations

Access reviews about..

Attractions/places to see on holiday

Places to eat or drink on holiday

Have done on holiday  Not done, but interested 



- Typically over a third do not use social media while on holiday, those that do stay in touch with friends and post photos
- Social media is not widely used during the holiday for recommendations and planning, suggesting that this information is sought from destination and attraction websites, specialist review sites etc.



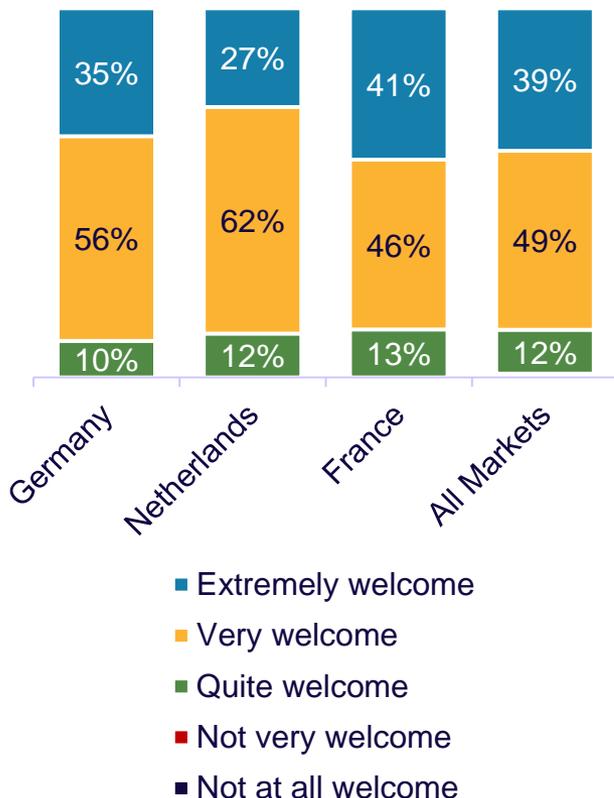
XV

Insight

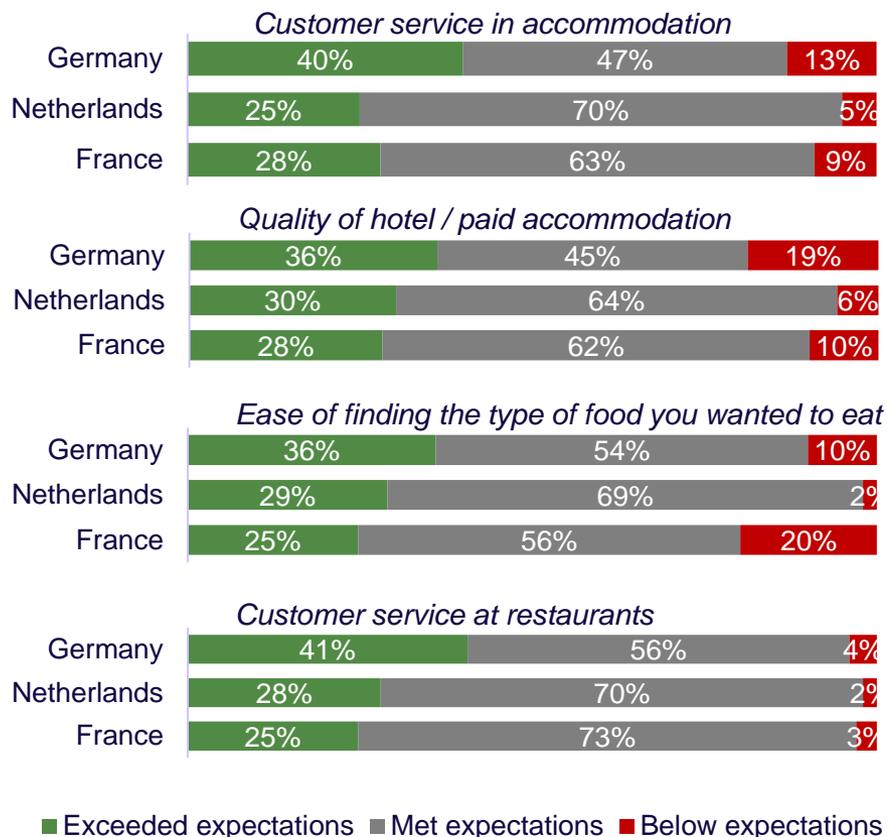
Optimising the Gourmet Garden Trails Experience **The Welcome**

The majority of visitors who have visited Britain stated they felt welcome – however, it will be important to choose the right accommodation providers to partner with

How welcome did you feel in Britain?



How would you rate the following in Britain compared to your expectations?



Caring for the consumer

Germany

- Very few German visitors expect their British hosts to speak German, with the majority of younger Germans speaking English.
 - German visitors are likely to have planned their itinerary in some detail; younger visitors may be more spontaneous, but all will welcome local recommendations for things to do and see.
 - Germans often try to find accommodation that has 'character'.
-

Netherlands

- Dutch visitors tend to be independent and most of them speak good English.
 - They often appreciate good value for money and cleanliness is very important. There tends to be an overall preference for small-scale (e.g. family-run) hotels with character and traditional decoration.
 - They also tend to like self-catering accommodation like lodges, static-caravans and cottages.
 - In general, there is a widespread love for camping amongst Dutch people and it is one of their most preferred types of accommodation; however, only 4% of nights spent in the UK in 2016 were spent in camping accommodation, around the same as the all-market average.
 - Complaints from Dutch visitors should be resolved promptly.
-

France

- Food is one of the great passions of the French people. French cooking tends to be highly refined and involves careful preparation, attention to detail, and the use of fresh ingredients. It varies by region and is heavily influenced by locally grown produce.
- Although they like to change their habits during their holidays (even when it comes to food), there are some areas where the French will not make concessions. Food and drink quality will always be compared with France. Perceptions of British food are below average although 16% stated as a motivation for a holiday in Britain that they would like to try local food and drink.
- Although the midday meal is still the main meal in rural areas, there is a tendency for families to eat the largest meal in the evening. Meal times: On week days, French go to lunch between 12pm and 2pm and dinner is usually served from 8pm.

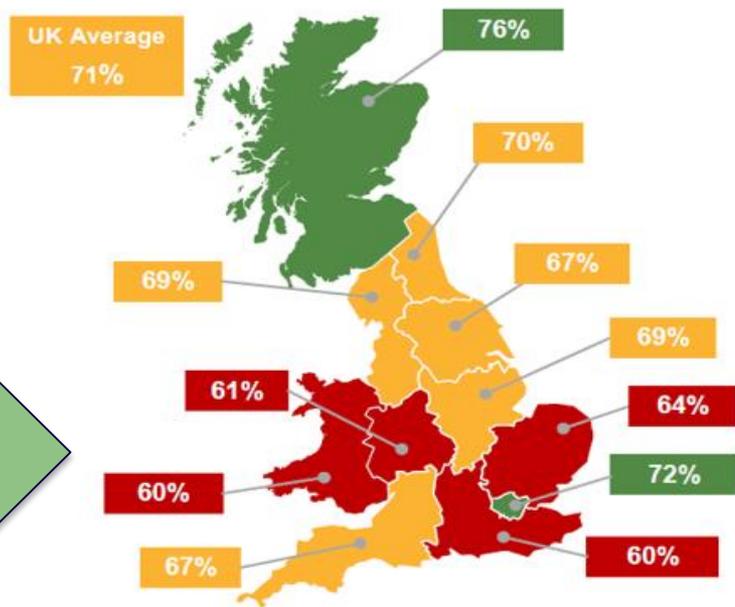
Propensity to recommend Britain differs across regions – being highest in London and lowest in the South East and West Midlands

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

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

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

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



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

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

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



XV

Insight

How to optimise the
Gourmet Garden Trail
Experience

The Purchase Journey

There are four stages to the planning process

- 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 (%):

Stages:

1. Research Destinations

2. Shortlist Options

3. Final Choice

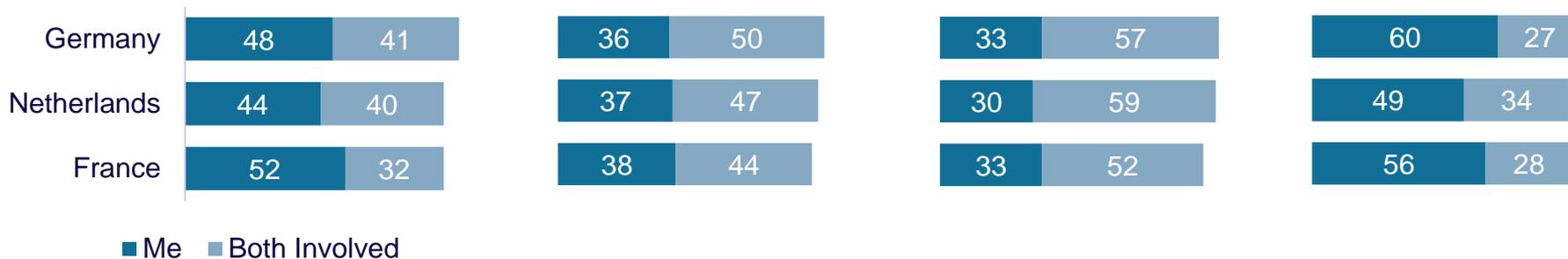
4. Make Booking

Roles: Most likely an individual activity

More likely to be a joint activity

More likely to be a joint activity

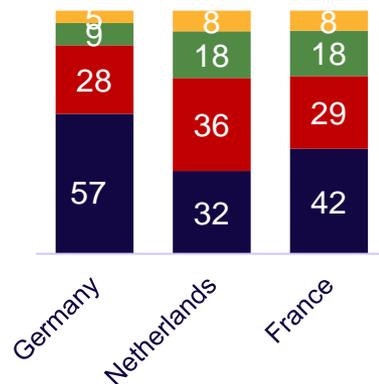
Most likely an individual activity



The length of the booking process varies somewhat by market; the lead time to booking is longest in Germany

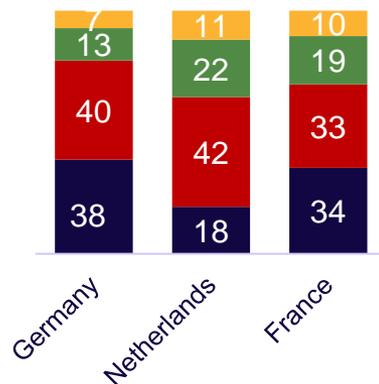
Started thinking about their trip (%)

- 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.



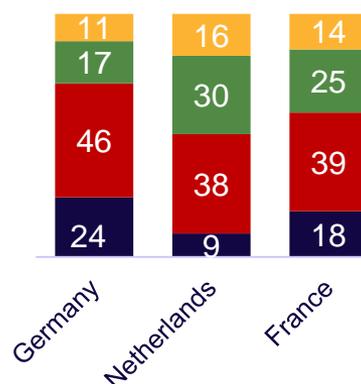
Decided on the destination (%)

- 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.



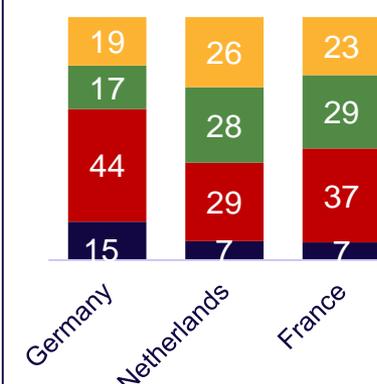
Looked at options / prices (%)

- 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.



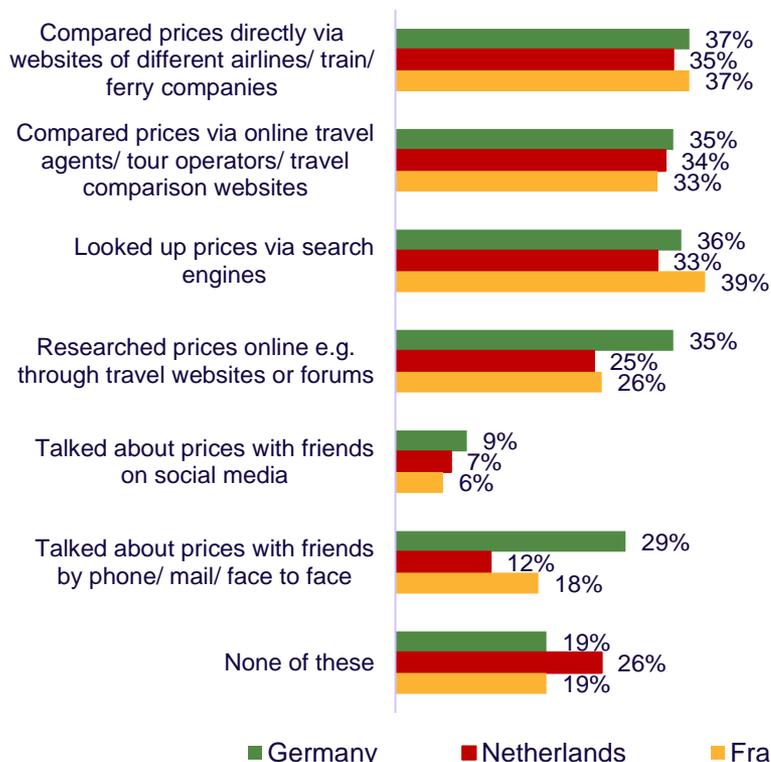
Age: 65+ year old's are most likely to decide furthest in advance across all the stages. The majority of those in the target group (45+ year olds) have booked between 3 to 6 months in advance.



Price Sensitivity and the role of Online Travel Agents

- Britain is perceived as an expensive place to visit by more than half in all target markets.
- OTAs play a significant role in enabling travellers to be confident with the price they are paying.
- OTAs 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.

% who would do this before booking a holiday to Britain



Usage of OTAs

| | DE | NL | FR |
|---|-----|-----|-----|
| I often compare prices from multiple OTA websites | 62% | 63% | 68% |
| OTAs are a good way of finding a destination within my budget | 64% | 61% | 61% |
| Best way of getting the lowest price | 55% | 45% | 51% |

%Strongly agree/agree about booking travel though OTAs

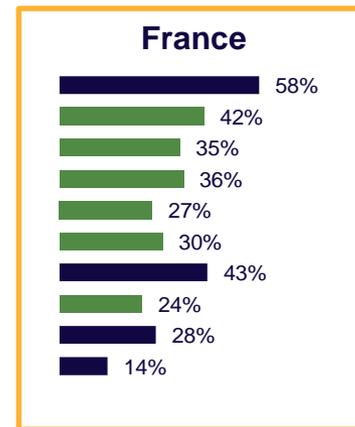
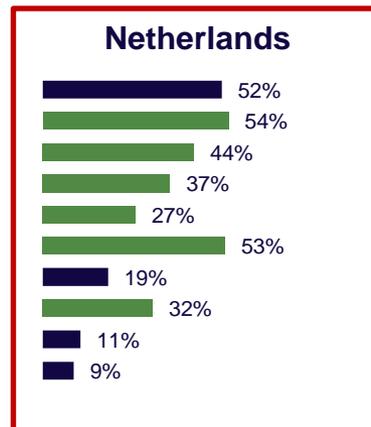
Online and offline sources both play a role influencing choice of Britain as a destination

- While ‘word of mouth’ is a big influence across the markets on destination of choice, there are some key differences to be noted for your target markets:
 - The Dutch are more likely to build their holiday themselves via search engines and direct with the accommodation
 - The Germans and the French are more likely to use travel guidebooks and official tourist brochures than the Dutch

Top Sources of Influence on destination

Sources of Influence

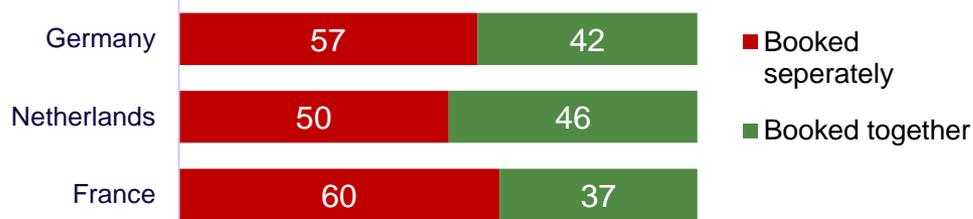
- Word of Mouth
 - Search engines
 - Price comparison site
 - Traveller review sites
 - Social media network
 - Accommodation/hotel website
 - Travel guidebook
 - Travel agent website
 - Official tourist brochure
 - Magazine/newspaper articles
- Online ■ Offline



Booking is an online dominated process

Travel & Accommodation Booking (%)

- The Dutch are most likely to book separately.
- Online dominates independent bookings, smart phone bookings are a small proportion of bookings (highest for package).



Transport

Accommodation

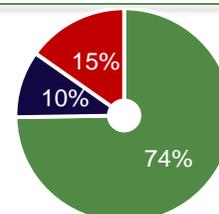
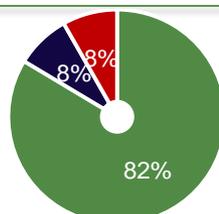
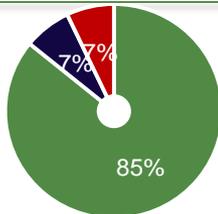
Package (Travel & Accommodation)

% Booked Online

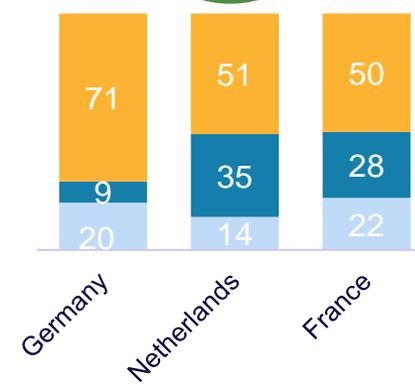
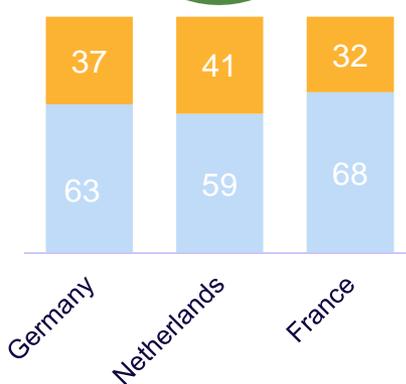
82 94 87

72 72 71

58 81 78



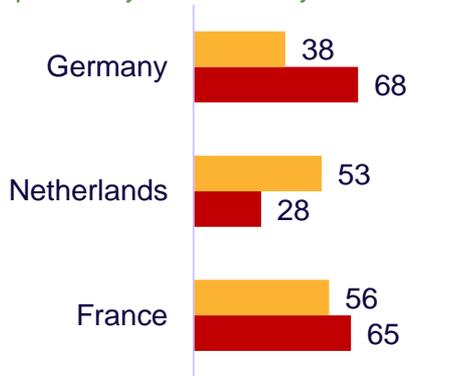
- Direct with travel / transport provider
- Direct with accommodation provider
- Through a travel agent / tour operator / comparison website



The Germans are much more likely to plan their holiday carefully before they leave – but booking activities / experiences is much more likely to be done during their trip

Itinerary planning vs. spontaneity

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



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

Pre-bookable transport / activities

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

■ Pre Booked prior to trip ■ Booked during trip

The Travel Trade Landscape



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



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



Top ten operators in France in 2015/16

| Top Ten Tour Operators | Turnover €m | Pax |
|--------------------------------|-------------|-----------|
| Groupe Club Méditerranée | 1,440 | 1,250,000 |
| Pierre & Vacances Center Parcs | 1,181 | 7,500,000 |
| TUI France | 620 | NA |
| Transat France | 441 | 375,000 |
| Groupe Fram | 394 | NA |
| Groupe Voyageurs | 362 | NA |
| Thomas Cook France | 334 | NA |
| Odalys Vacances | 246 | 2,300,000 |
| NG Travel | 210 | 203,283 |
| Belambra | 162 | 500,000 |

Source: Echo Touristique

Major tour operators with a Britain programme



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.



France

- **Magazines**
 - Geo (circulation: 167,051)
 - National Geographic France (circulation: 60,336)
 - NG Traveller France (circulation 100,000 per quarter)
 - Grands reportages (circulation: 42,000)
 - AR Magazine (circulation: 25,000)
- **Travel blogs and vlogs** are developing fast, hundreds of them available, mostly amateur. 20 to 30 are now professional. All of them include social media presences. Votretourdumonde.com and Madame-Oreille.com are considered the best.
- **Dedicated TV travel programmes:** “Faut pas Rever” (France 3), “Thalassa” (France 3), “Echappees Belles (France 5), “Rendez-vous en Terre Inconnue” (France 2) as well as inter-cultural travel programmes on the German-French cultural channel ARTE.
- 61% of the population read at least one **newspaper** per day. Almost all 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.



VisitEngland

XV

Insight

How to optimise the
Gourmet Garden Trail
Experience

Travel Trade

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

Strengths

- The countryside, including walking, is strong esp. in Germany. Combined with heritage/history this could include villages, gardens etc.
- The chance to experience local culture & lifestyle.
- Scenery & countryside.
- South Coast, Devon Cornwall & Cotswolds have best awareness.
- Interest in rural England and the English way of life (esp Germany).
- Walking and soft adventure (leisurely, short walks) appeals.
- Personalisation is a growing trend.

Weaknesses

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

Opportunities

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

Threats

- Unwilling to promote a product with unproven demand.
- North seen as difficult to sell.
- Past bad experience of trying to sell Central and Northern England.
- Brexit – Europeans may feel ‘unwelcome’ and concerns around Visa’s etc.
- London and the South dominate - good for the South East/South West itineraries - not for the North.
- Good transport is required with clear signage.

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.

France

- 1/3 of international French travellers booked through tour operators and agencies.
- England provides the combination of safety and off-the-beaten track experiences.
- Demand for personalised products.
- Late bookings increasing.
- Brexit concerns, but also see benefit of exchange rate.
- General and specialist (film, music, history) tours.
- The North difficult to sell – lack of awareness.
- Proximity, culture, language, diversity all strengths.
- Barriers: Inflexibility for groups, nothing new, accommodation & food.

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.

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.

How can Gourmet Gardens Trails optimise the experience / proposition?

1. Promoting Regional England

- Awareness of regional England is the biggest challenge to overcome – through partnerships, there is a need to **grow awareness and help inbound visitors imagine the experience** they will have outside London.
 - **Helping customers imagine regional England** - Compare England offer favourably with similar, well-known 'regional' offers in other countries e.g. Cornish coast/ Spanish Costas.

2. Gateways and Transport

- **Encouraging the use of regional gateways** (airports and seaports) is key to get visitors to go beyond London. The majority of visitors to England enter through London or the South East – and tend to stay near that gateway region.
- While there is high consideration for car hire across the markets it does not always translate into actual usage. This may suggest that visitors do not find it easy to book car hire but further exploration is required to validate this. **Car hire partnerships will be essential to build into the proposition given the itineraries.**

3. Accommodation

- **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.
- Types of accommodation considered illustrates the potential for a **range of diverse options that could be included within the proposition** i.e. not limited to hotels.

4. Activities

- While visiting Parks and Gardens still ranks within the top 8 activities considered among the Dutch, it is less appealing compared to other activities i.e. such as exploring villages / rural areas and have Gourmet meals. This suggests **leading with 'Gourmet' in the branding rather than 'Gardens' is a sensible approach**, particularly in the Dutch market.
- This relatively **low association with some food & drink specialities could be used in messaging to promote the uniqueness** of the experience.

How can Gourmet Gardens Trails optimise the experience / proposition?

5. Itineraries

- Given the skew to the South among visitors, the **North West cluster will require stronger communications to encourage visitors**. The Gourmet Gardens team may consider targeting the products in the South to first time visitors and those in the North to repeat visitors who may have already visited the South regions.
- **3 or 5 day example itineraries are likely to have more appeal** but the Gourmet Gardens team should also **consider itineraries showcasing day trips**.
- Developed itineraries highlight the overlap with some other DEF projects i.e. Chester, Heritage Cities. **Partnerships should be considered with other DEF projects**.

6. Using Technology

- Consider ways to **maximise opportunities that exist on social media** platforms to communicate and promote your propositions.

7. Welcome

- **Communicate to accommodation and experience providers the similarities and differences of expectations by market** i.e. no carpet in the bathroom for Germans, French like to eat dinner after 8pm etc.

8. The booking experience / travel trade

- Booking is an online dominated process – **visibility online** for accommodation, experiences and transportation (car hire) is key.
- It goes without saying that **the travel trade** have potential to encourage or discourage visitors – they are also a **key ally in helping us promote regional England**.



Appendix

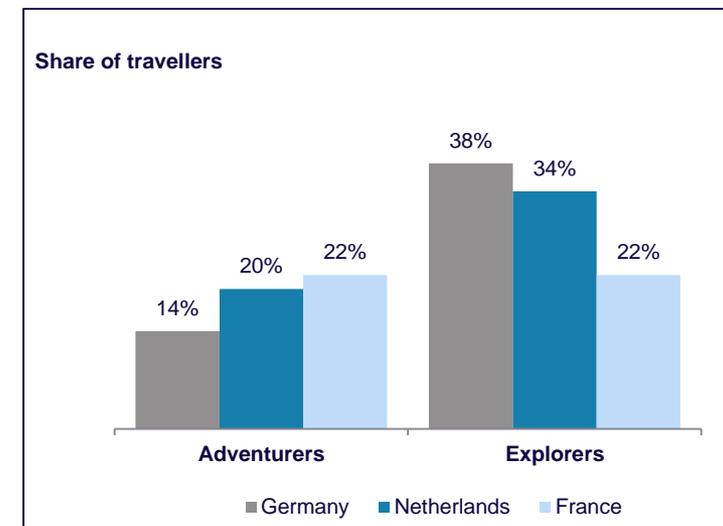
- Detailed segment profiles
- Data sources

Targeting the most appropriate segments

- Gourmet Gardens have targeted **Cultural Adventurers**, **Outdoor Enthusiasts** and **Mature Experience Seekers**.

| | Cultural Adventurers | Outdoor Enthusiasts | Mature Experience Seekers |
|--|---|---|--|
| Profile | 25-39 years Couples, pre-children or young families ABC1 | 35-55 years Families/Empty nesters ABC1 | 50-65+ years Empty nesters, may be retired |
| Key Markets | China, GCC, India, Netherlands, Nordics | Germany, France, Spain | Australia, France, Germany, Spain, USA |
| Defining attitudes & traits | Independent, adventurous, busy, interested in other cultures, influential | Active, nature lovers, cycling, curious, off-the-beaten-track | Young at heart, keen to learn, considered and conscious – like to plan |
| Key interests | Travel, food & drink, arts, shopping, sport, outdoor activities | Walking, hiking, cycling, time close to nature | Staying healthy & active, outdoors/nature, high culture, walking/hiking, |
| Travel preferences | Frequent travel, mix of long & short haul, plan in advance, independent | Beyond 'sunshine' countries, activity driven & value scenery, a sense of discovery | Plan & research in advance, easy access places, open to organised tours |
| Holiday activities | Soaking up culture & atmosphere, natural/cultural scenery | Enjoying natural landscapes, getting close to nature, learning about culture/heritage/food, seeing the sights, meeting people | Time outdoors, walking, learning about local heritage & culture, trying a new activity/skill, sampling local food |
| Accommodation preferences | Want the unique High quality, luxury hotels | Not mainstream hotel chains Independent hotels, B&B, camping Quirky, close to nature | City stays – range from B&B to 4* hotels Non-city stays – places with character (smaller hotels, B&Bs, guesthouses) |

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



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

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

EXPLORERS

AGE

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

KEY MARKETS

- Australia, Germany, France

GENDER

- 52% Female

DEFINING ATTITUDES

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

FAVOURITE TRAVEL ACTIVITIES

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)

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

GB LIKELY ACCOMMODATION (unique vs others segments)

- Bed & Breakfast
- Self-catering

TRAVEL PLANNING & STYLE

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



WHO ARE THEY?

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

ADVENTURERS

AGE

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

KEY MARKETS

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

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

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

DEFINING ATTITUDES

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

GENDER

- 53% Male

FAVOURITE TRAVEL ACTIVITIES

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)

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

GB LIKELY ACCOMMODATION (unique vs others segments)

- Bed & Breakfast popular

TRAVEL PLANNING & STYLE

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



WHO ARE THEY?

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

CULTURE BUFFS

AGE

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

KEY MARKETS

- China

GENDER

- 57% Female

DEFINING ATTITUDES

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

FAVOURITE TRAVEL ACTIVITIES

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)

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

GB LIKELY ACCOMMODATION (unique vs others segments)

- Mainstream hotels and bed and breakfast

TRAVEL PLANNING & STYLE

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



WHO ARE THEY?

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

SIGHTSEERS

AGE

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

KEY MARKETS

- USA

GENDER

- 52% Male

DEFINING ATTITUDES

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

FAVOURITE TRAVEL ACTIVITIES

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)

- Experiencing city life
- Attending a specific event

GB LIKELY ACCOMMODATION (unique vs others segments)

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

TRAVEL PLANNING & STYLE

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



WHO ARE THEY?

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

Links to data sources

- VisitBritain Decisions & Influences Research, 2016
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 - <https://www.visitbritain.org/markets/>

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