Discover England Fund Research Summary Report

Cycle England: Explore England on a Bike

February 2017

Contents

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

Note 1: Sources are short-referenced on each page. Full details of data sources including links where appropriate are in included in the appendix.
Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.

Introduction

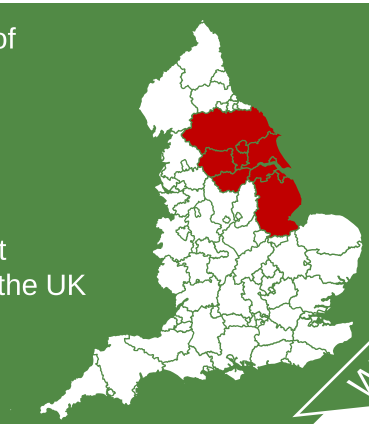
VisitEngland XV Insight

Project overview

Focused in the North of England:

- Yorkshire
- Lincolnshire

Before being rolled out throughout the rest of the UK



Where?

The development of new and exciting cycling tourism breaks, creating an innovative, distinctive, end-to-end bookable product.

Cycle England will capitalize on the high profile nature of cycling in the North of England and Lincolnshire – tapping into the huge interest in cycling as a leisure activity throughout Europe.

What?

Bringing together bookable, end-to-end cycling holiday experiences. Making them available through European tour operators with commissionable elements that deliver a distinctive and tailor made experience.

Cycle England: Explore England on a Bike

- **Target Markets:** Germany and Netherlands
- **All cycling levels:** 6 levels, from Easy Rides (beginners) to Professional Rides (serious enthusiasts)
- **Target segments:** Outdoor Enthusiasts, Young Active Explorers, Lifestyle Travellers
- **Demographics:** ages ranging from 18 – 55

Who?

Why?

To capitalise on a popular and growing leisure activity and major global growth market. To challenge the multiple and well established European countries currently profiting.

It will also deliver increased tourism visits to the UK by raising the profile of England as a place with 'beautiful natural landscapes'.

This project will deliver an ROI of 11:1 over a 10-year period, totalling an estimated £11m of economic impact.

Source: Cycle England Business Case

Product proposition and branding – Cycle England: Explore England on a Bike

Designed for holidaymakers looking for an active and enjoyable holiday break.

What's on offer

- As well as world class cycling routes, we have kilometres of established cycle paths set amongst some of the most amazing countryside.
- You will be able to explore the culture and heritage of 'hidden England' at your own pace.
- Whether you are a true cycling enthusiast looking for challenge and adventure, or are seeking a more leisurely break by bike, Cycle England has a holiday just for you

What you will get

- Once you are here, we take care of everything – from booking your trip to bike hire, luggage transfer, accommodation and more.
- All you have to do is sit back and pedal. You can choose from a huge range of activities, places to stay and experiences to tailor make your own holiday.
- So get on your bike and Cycle England! See for yourself some of the iconic English landscapes, towns and villages and get ready for a truly unique holiday experience.

Explore England on a Bike

Source: Cycle England Business Case

Itinerary 1. Cycle England – Test your mettle on the Yorkshire Terrier

About

- Pedal in the tyre tracks of champions from the 2016 Tour de Yorkshire. Advanced, challenging route. Test your mettle, challenge your fitness and enhance your cycling performance. Incredible towns, views of iconic Yorkshire.

Highlights

- Classic English countryside, some of the most iconic towns, cities, buildings. Challenging climbs and sprints including the Cote de Shibden Wall and Harewood Bank. Historic towns of Bradford, Skipton, Halifax and Sheffield

Itinerary - sights and key stops

- Day 1 involves 194.5km cycling
- UNESCO World Heritage Site of Saltaire
- 2014 Tour de France Grand Départ route at Burley-in-Wharfedale
- Bolton Abbey
- Yorkshire Dales National Park
- Rylestone, home of the original Calendar Girls
- Herriot Hotel in Skipton
- Côte de Silsden climb, infamous Côte de Shibden Wall
- Categorised climbs Deepcar, Wigtwizzle, Ewden Height, Midhopestones to finish at Fox Valley, Sheffield
- Stay at 4 star Cubley Hall
- Piece Hall, Skipton Castle, Salts Mill, Keithley and Worth Valley Railway are heritage options

Key facts:

3 days

205 miles

Individual tour

Group tour

Humberside
Leeds, Manchester

P&O Crossing to Hull

Source: Cycle England Business Case

Itinerary 2. Cycle England – Yorkshire Heritage by the sea

About

- Our Yorkshire Heritage by the Sea holiday experience allows you to see the many incredible heritage properties across this particular part of Yorkshire whilst enjoying a moderate cycle ride to take you on your journey

Highlights

- Friendly B&Bs, can upgrade to county house hotels. Cycle through quintessential rural England. Heritage, landscapes, villages and towns and the great Yorkshire welcome. Historic town, market towns, seaside resorts.

Itinerary - sights and key stops

- Driffield, the Capital of the Wolds
- Sledmere House
- Yorkshire Wolds and villages
- Malton ‘foodie’ destination. Malton Food Tour, Museum
- Talbot Hotel fine dining menu
- Ryedale market town
- Pickering – North Yorkshire Moors railway, Castle
- White Swan Inn Hotel, traditional 16th century inn, dinner
- North York Moors National park
- Whitby Abbey, Captain Hook museum
- White Horse and Griffin dinner
- Coastal ride to Scarborough, Robin Hoods Bay
- Scarborough Castle
- Grand Hotel Scarborough

Key facts:

5 days

73 miles

Individual tour

Group tour

Humberside
Leeds, Manchester

P&O Crossing to Hull

Train to Yorkshire Wolds & Driffield

Source: Cycle England Business Case

Itinerary 3. Cycle England – Taste Lincolnshire

About

- Experience the tastiest food experiences (Lincolnshire sausage, Plum Bread, brewery tours). Stunning landscapes. Moderate level holiday, on quiet country lanes and off road routes, mostly flat, with some hills.

Highlights

- Cycle friendly B&Bs, cycle through the Lincolnshire Wolds and experience quintessential rural England
- Experience some of England's finest fresh, local food and drink. Visit the city of Lincoln, its Cathedral and Castle

Itinerary - sights and key stops

- Taste Doddington Hall experience and lunch
- River Witham
- Lincolnshire Wolds and villages
- Lincoln Steep Hill food tasting
- The Bronze Pig tasting menu
- Daisy Made farm and ice cream
- Lincoln Castle and Cathedral, 1215 Magna Carta
- Blue Bell Inn traditional pub lunch
- 'Foodie' town of Louth
- Dinner at Michelin listed 14 Upgate
- Windmill tour and coffee stop – incl. Plum Bread
- Afternoon tea at The Elms
- Batemans Brewery tour and lunch
- Lincolnshire coast, wildlife guide tour of Gibraltar Point

Key facts:

5 days

80 miles

Individual tour

Group tour

Humberside
East Midlands,
Stanstead

Train to Lincoln city centre

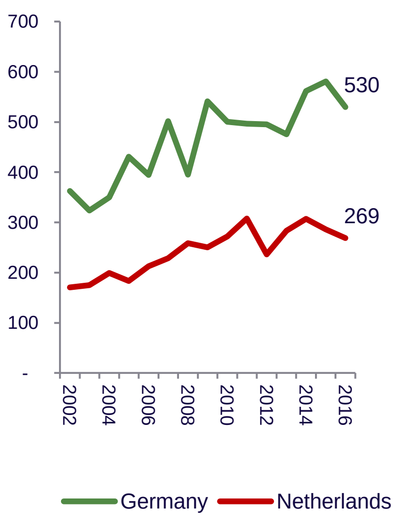
Source: Cycle England Business Case

Current Trends & Challenges

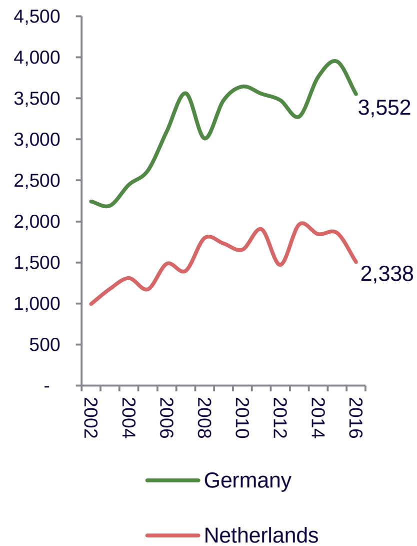
Current Inbound Travel Trends to England (outside of London)

- Less than a third of all trips to England made by overseas visitors involve a stay outside of London. While visitors from Germany and the Netherlands are more likely to visit regional England, less than 4% have visited Yorkshire or the East Midlands area.

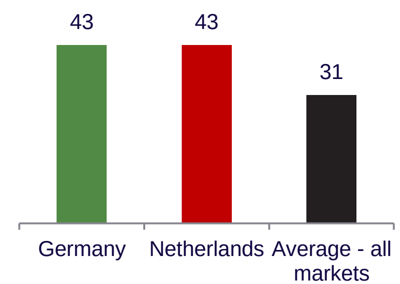
Holiday Visits (in 000's) to England (Outside London)



Holiday Nights (in 000's) to England (Outside London)



% Proportion of holiday visits to England (Outside London) in 2016



- 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. In Q3 2017, all visits were up 4%
- **Netherlands:** Visits and duration have both declined in 2017. But in Q3 2017, all visits were up 10%.
- Visitors from both Germany and Netherlands are more likely than average to travel beyond London.

IPS 2013-2015	DE	NL
% of inbound visitors visiting Yorkshire	3%	4%

IPS 2013-2015	DE	NL
% of inbound visitors visiting East Midlands	2%	3%

Source: IPS 2002-2016

Key challenges – Political, Economic and Social environment

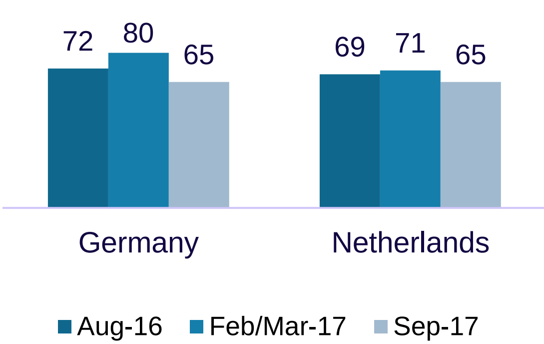
Geopolitics: Safety / Security

"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 (%)

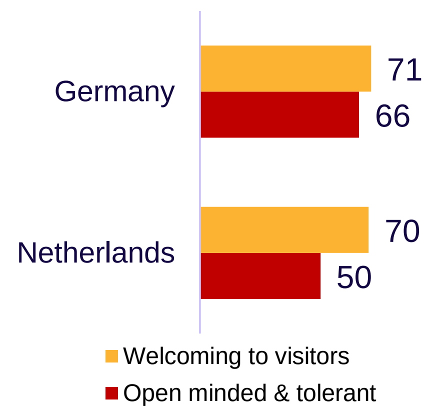


Perceptions of Britain

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 (%)

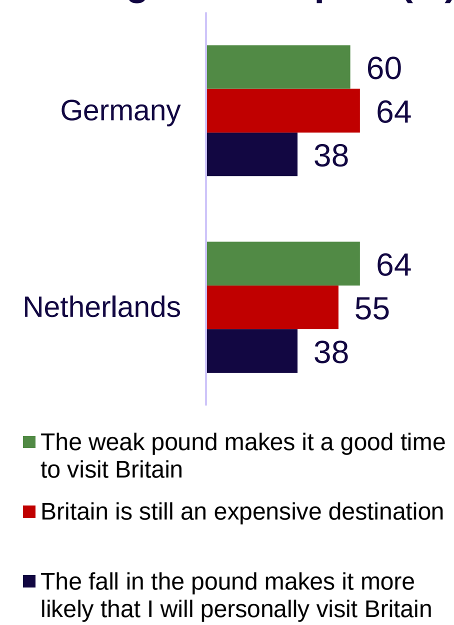


Exchange Rate

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 (%)



Source: Inbound consumer sentiment research

Key challenges – Competitive environment

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 a visit to Britain (all, not just those considering a cycling holiday):

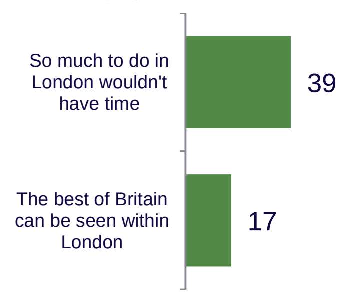
- Germany – Ireland, France
- Netherlands – France, Spain

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

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

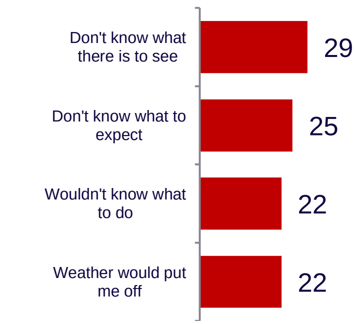
- Providing clarity around journey planning around regional England is key

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 (%)*

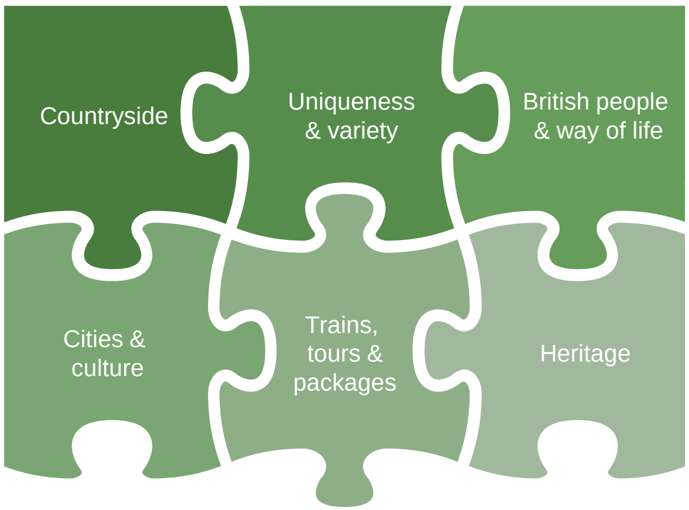


* Data is all visitors to England who only visited London

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

Triggers to get visitors to travel beyond London tie in well with themes included within the Cycle England proposition

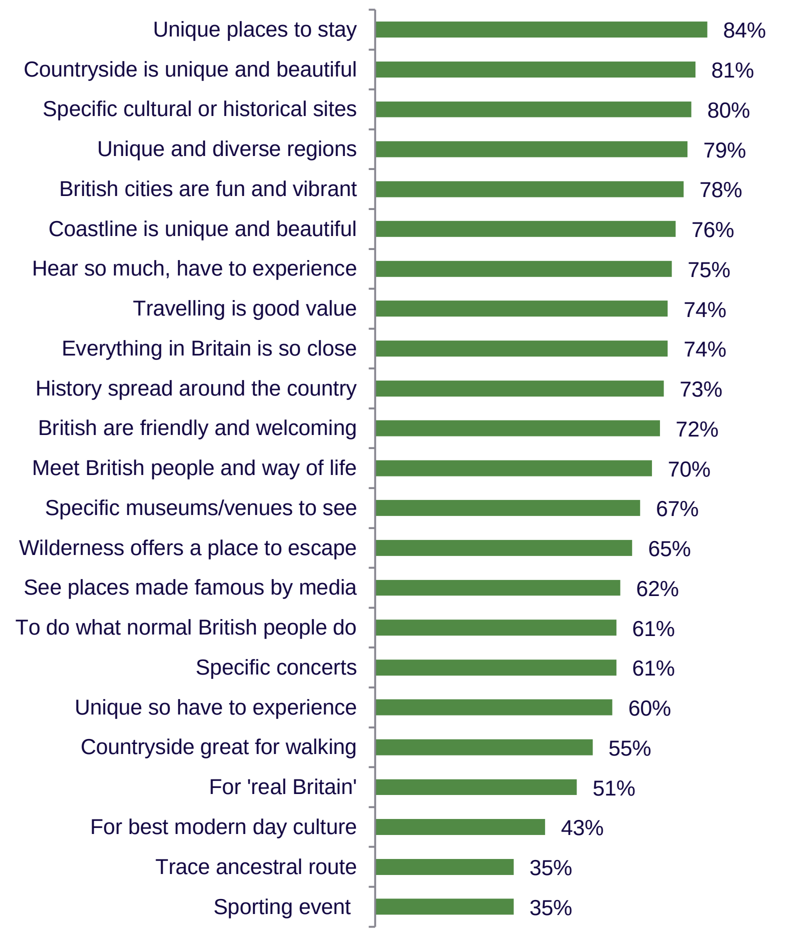
Triggers to go beyond London



Implications

- Main reasons to travel beyond London are ones that Cycle England 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

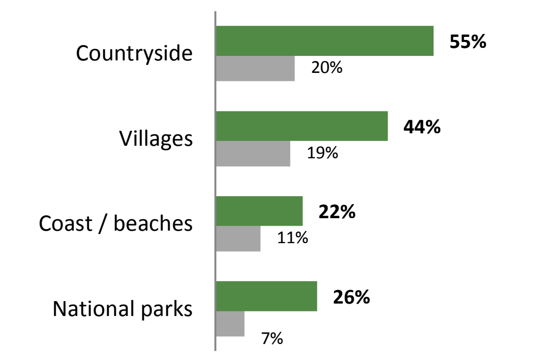


Source: IPS via Discover England: summary insights on overseas visitors to England's regions 2016

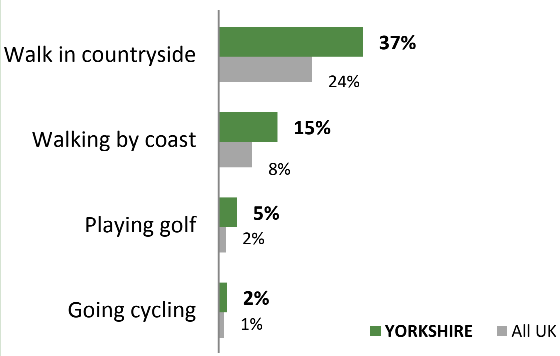
Appeal of Yorkshire: Currently there are a wide variety of activities inbound visitors to Yorkshire partake in, but it is not a well known venue for cycling

Outdoor activities over-index for Yorkshire, reflecting the importance of the landscape and the National Parks. However, Yorkshire is not well known for cycling

Visiting rural / coastal locations

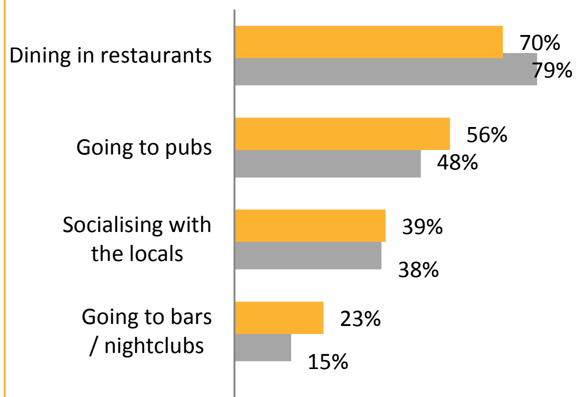


Participating in outdoor / sports activities

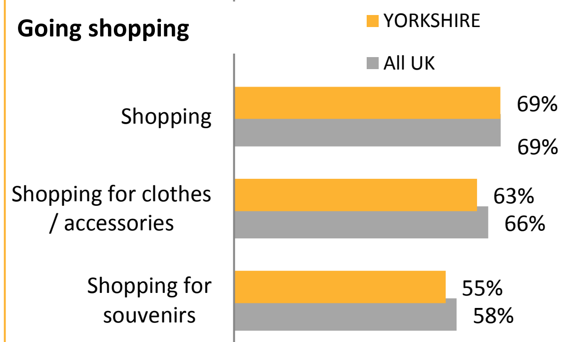


Food & drink are also popular, particularly pubs and eating in restaurants.

Going out to eat, drink or socialise

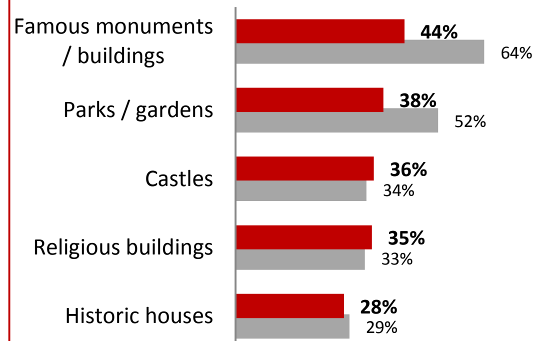


Going shopping

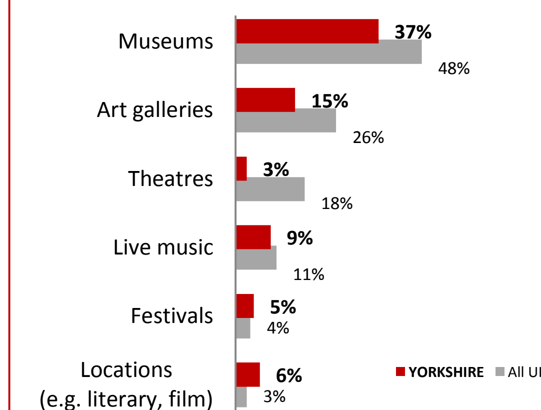


Whilst Yorkshire under-indexes for historical destinations and museums generally, visiting castles and religious buildings is undertaken.

Visiting heritage related attractions



Visiting cultural attractions



Charts illustrate the % of visitors to the region who experienced the region's product. No data available for Lincolnshire

Source: Regional Pen Portraits – IPS via Discover England: summary insights on overseas visitors to England's regions, 2016

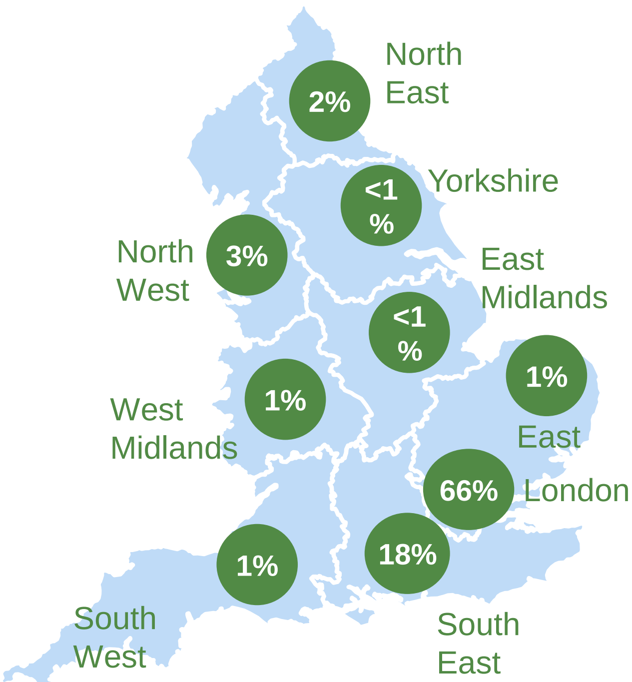
How to optimise the Cycle England Experience

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 - and tend to stay near the gateway region.
- Air travel is the main mode of entry for the Germans and the Dutch but seaports are a popular way of getting to the UK from both target markets.

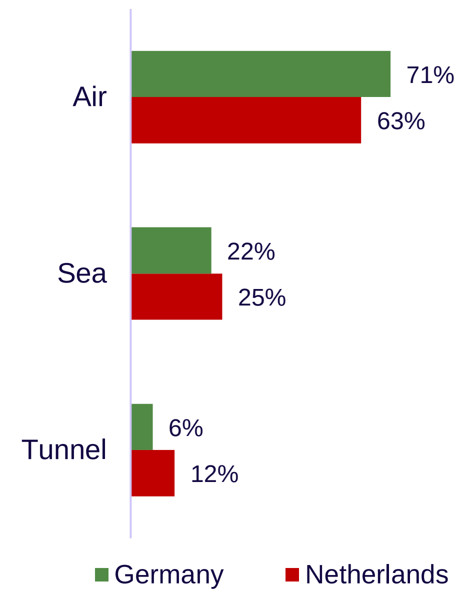
Gateways: Region of Entry (UK Holiday Visitors)



Mode of Entry (UK Holiday Visitors)

- **London Airports** 54%
- **Rail** 18%
- **Seaports** 14%
- **Regional Airports** (see capacity on next slide) 6%

Mode of Entry (all UK Visitors)



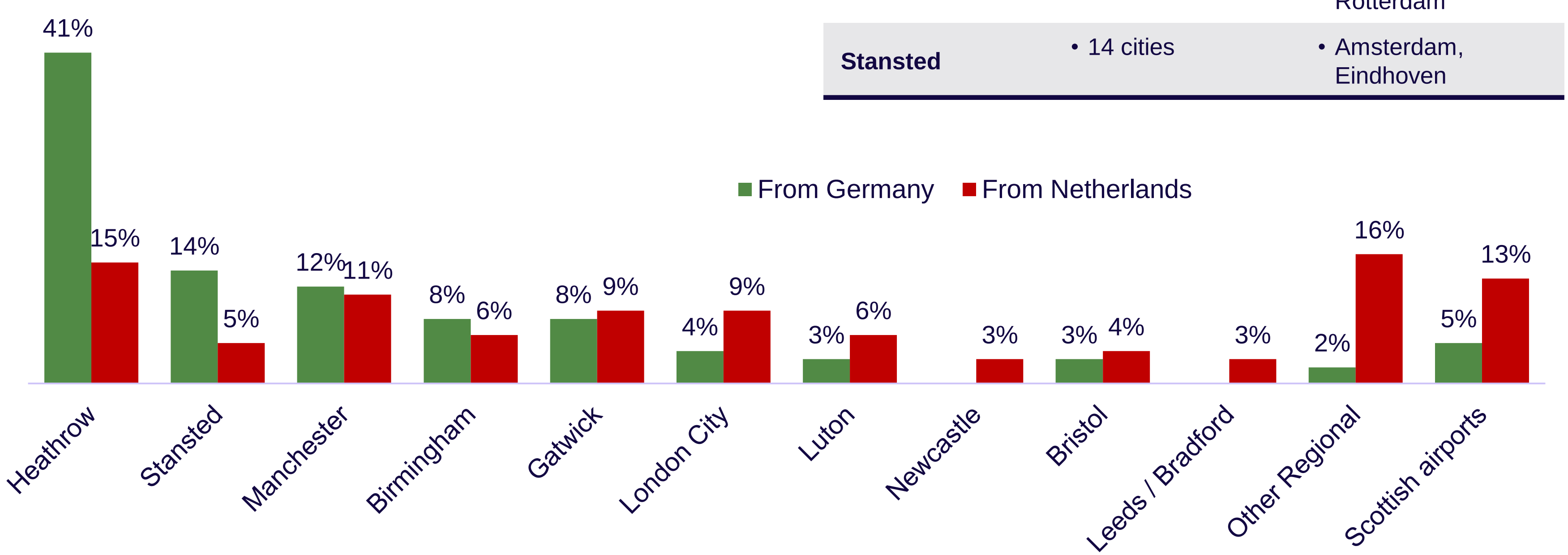
Source: IPS via Discover England: summary insights on overseas visitors to England's regions 2016, VisitBritain Market summaries

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

- Outside of Stansted and Manchester the other regional airports in close proximity to Yorkshire and Lincolnshire have relatively low annual seat capacity.
- The smaller regional airports are also limited from which cities inbound travellers can travel from – particularly Humberside and East Midlands Airport.

Airport	Germany destinations	Netherland destinations
Humberside	• None	• Amsterdam
East Midlands	• Berlin	• Amsterdam
Leeds / Bradford	• Dusseldorf, Munich, Berlin, Frankfurt	• Amsterdam
Manchester	• 10 cities	• Amsterdam, Rotterdam
Stansted	• 14 cities	• Amsterdam, Eindhoven

Annual Seat Capacity (from target markets to the UK)



Source: Apex Rdc 2016: Non-stop flights only

Source: VisitBritain Market and Trade profiles

Journey times from airports and seaports highlight the optimum entry points for each proposed itineraries

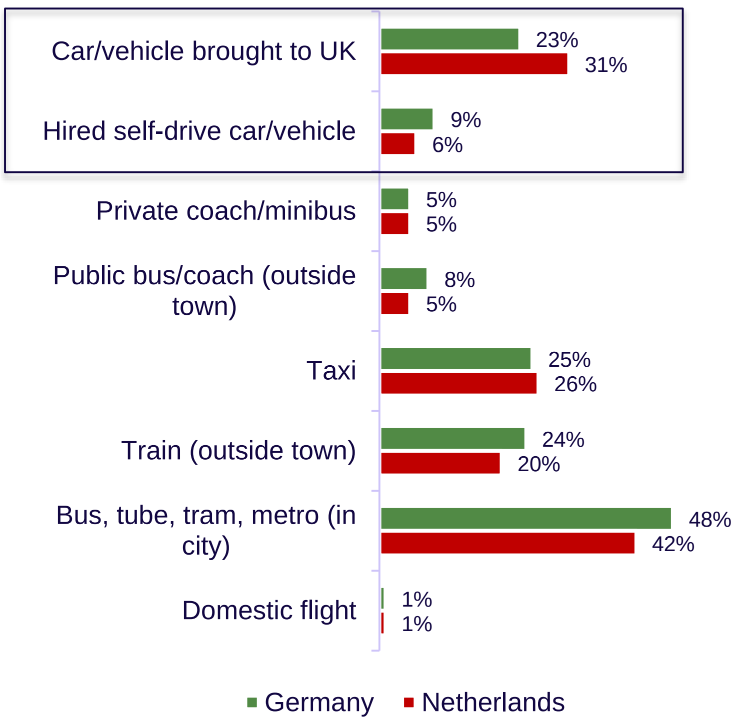
- Journey times from Stansted highlight the challenge of using this airport as a point of entry into the UK for the Cycle England product

Airport / Seaport	Start Point	Tour 1: Bradford	Tour 2: Driffield	Tour 3: Lincoln
Humberside Airport	A B	73miles	36miles	32miles
		1hr 20mins	1hr	45mins
		2hrs 40mins	1hr 50mins	1hr
East Midlands	A B	89 miles	104miles	51miles
		1hr 35mins	2hrs	1hr 20mins
		2hrs 50mins	3hrs 20mins	2hrs
Leeds-Bradford Airport	A B	8miles	60miles	85miles
		24mins	1hr 30mins	1hr 45mins
		50mins	2hrs 30mins	2hrs 50mins
Manchester Airport	A B	48miles	109miles	98miles
		1hr 4mins	2hrs	2hrs
		2hrs 20mins	3hrs 25mins	3hrs 30mins
Stansted Airport	A B	180 miles	190miles	128miles
		3hrs 30mins	3hrs 23mins	2hrs 10mins
		3hrs 40mins	4hrs 20mins	3hrs 20mins
Hull Ferry	A B	68miles	23miles	46miles
		1hr 15mins	49mins	1hr 20mins
		1hr 50mins	40mins	2hrs 20mins

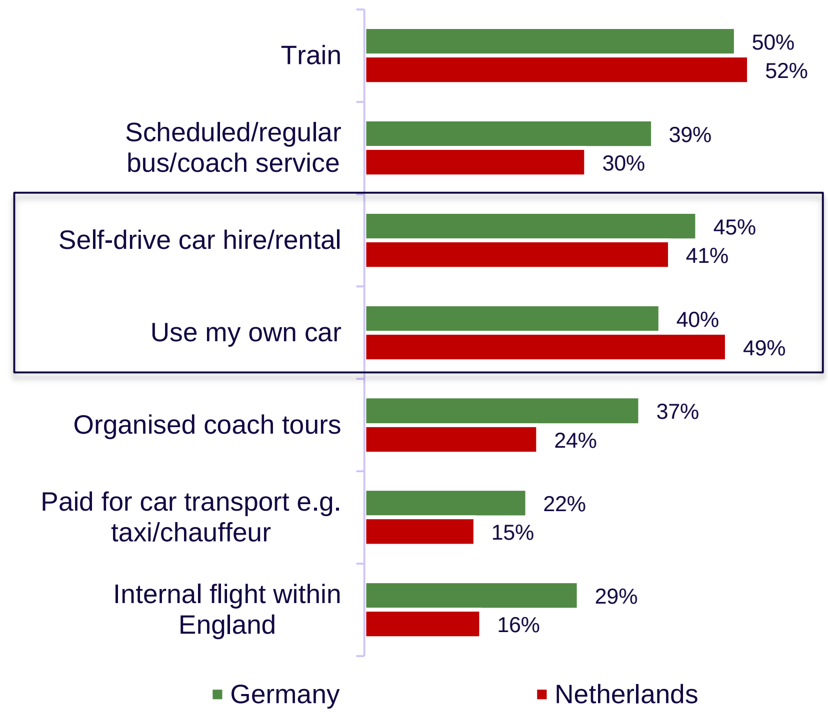
Use and consideration of personal and public transport is relatively high for the target markets, reducing the 'last mile' challenges

- The Dutch are most likely to bring their own transport with them – it is slightly lower for the Germans.
- 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.

Modes of Internal Travel in UK (all visitors)



Types of transport considered



Source: VisitBritain Market and Trade profiles

Source: DEF Themes and Activities Research 2017

There are number of cycle tour holiday operators who can support delivery of the proposition and any 'last mile' challenges

1. **Yorkshire Velo Tours** http://www.yorkshirevelotours.com/
Road cycle tours, rides, routes and group events in beautiful Yorkshire. Offers a wide range of tours and trips from set itineraries to bespoke trips geared to exactly meet requirements. This can range from advice on routes, to a full package including accommodation, transport, full ride support and hire bikes. If visiting alone or part of a group or cycling club, they have a tour for it.

2. **Spin Cycling Tours** https://www.spincyclingtours.co.uk/
Spins vision is for the ultimate riding experience. Run by an accomplished cyclist, experienced cycle guide (has guided many times in Mallorca, France, Italy and Norway). Combined experienced guides, cycling support services and premium accommodation in the beautiful landscape of Yorkshire. The Spin team handles all the splendid details from fantastic dishes served by the dedicated chef, to any special requests and extras someone might want to add to their trip to make the stay even more personal.

3. **CTC Cycling Holidays** http://www.cyclingholidays.org/tours/index.php
Offers comprehensive range of cycling holidays available in the UK. Every tour has its own unique personality. Tour leaders are highly experienced, volunteer enthusiasts. They design and plan a trip because they really, really want to go. Offer a tour for 'Christmas in York'

4. **Bikecation** http://www.bikecation.co.uk/
Holidays can be a few days away, a long weekend, a mini break or a week long holiday. Bikecation organise biking tours in the most beautiful parts of Great Britain and abroad. Provide a bike, organise the route, provide detailed information about the area cycling through, giving information and tips on the best places to stop. Move luggage from one place to the next, providing a hassle free and stress free time, so that customers can concentrate on enjoying the ride and the views. Way of the Roses tour goes through Yorkshire Dales / York area

Taking your bike on a plane, ferry or train

Advice on what to do if you are travelling by these methods

- **Plane:** Most airlines require you to stow your bicycle in a bike travel bag or bike box. It's wise to protect your bike by disassembling things like pedals and wheels and wrapping them securely. Also consider getting insurance for your bicycle. You'll need a set of allen keys and a pedal spanner. Keep any tools you use to take it apart in the bag so that you have them to reassemble when you arrive. Before removing the seat, measure the seat height as you normally have it. Remove the handlebars and wheels and attach them to the frame using ties or straps. Many airlines ask that you deflate the tyres as well, as cabin pressure can cause tyres to over-inflate. Use plastic bags to wrap around messy parts such as the chain.

- **Ferry:** When attached to a vehicle: You can travel with bicycles attached to your vehicle. You just need to include any attached racks or boxes in the height and length of your vehicle when booking.
- When taking on board: Your bicycle counts as a vehicle and needs to be booked in advance before it can be taken on board. Only one bicycle is allowed per booking. Passengers travelling with bicycles should check in at the same time as foot passengers. You must place your bicycle below deck yourself, following vehicles up the ramp on foot. You can take your bicycle on board any P&O Ferry route. There is no need to pack up your bicycle before travel. All bicycles are stored on the vehicle decks.

- **Train:** National Rail encourages the integrated use of cycles and trains. Some Train Companies have restrictions on when accompanied cycles may be carried, especially at busy times. Check with the Train Company direct to review their ‘onboard facilities’ section for further details. Where accompanied cycles are carried there is no charge. Unaccompanied cycles cannot be carried on any services. If a cycle reservation is required please make it as far in advance as possible. Where a seat reservation system is available, the reservation of cycle space is also normally provided. Please label your cycle clearly. Tandems, tricycles and bicycle trailers are not carried unless otherwise stated, and may incur additional charges. Cycles must be carried in the designated area on trains and must not obstruct doors or aisles.

How to optimise the Cycle England Experience

Building an appealing cycling product

Challenge and / or action based activities are not what the majority of visitors from Germany or Netherlands would consider doing when on holiday in England

Germany

CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND

TOP 2 BOX (DEFINITELY WOULD OR VERY LIKELY TO) CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND AND INDEXING AGAINST "GLOBAL" TOP 2 BOX SCORES. BOTH COLUMNS SHOW / BASED ON NORMALISED DATA

ACTIVITY CLUSTER	DEFINITELY / VERY LIKELY	INDEX CONSIDERATION
Visiting famous / iconic attractions / places	88%	108
Experiencing city life	76%	107
Exploring history and heritage	75%	100
Experiencing rural life & scenery	67%	110
Attending cultural / music / sports events	44%	82
Outdoor leisure pursuits	41%	72
Challenge and / or action	21%	67

Netherlands

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Visiting famous / iconic attractions / places	88%	107
Experiencing city life	71%	100
Exploring history and heritage	70%	94
Outdoor leisure pursuits	68%	120
Experiencing rural life & scenery	61%	100
Attending cultural / music / sports events	37%	69
Challenge and / or action	25%	80

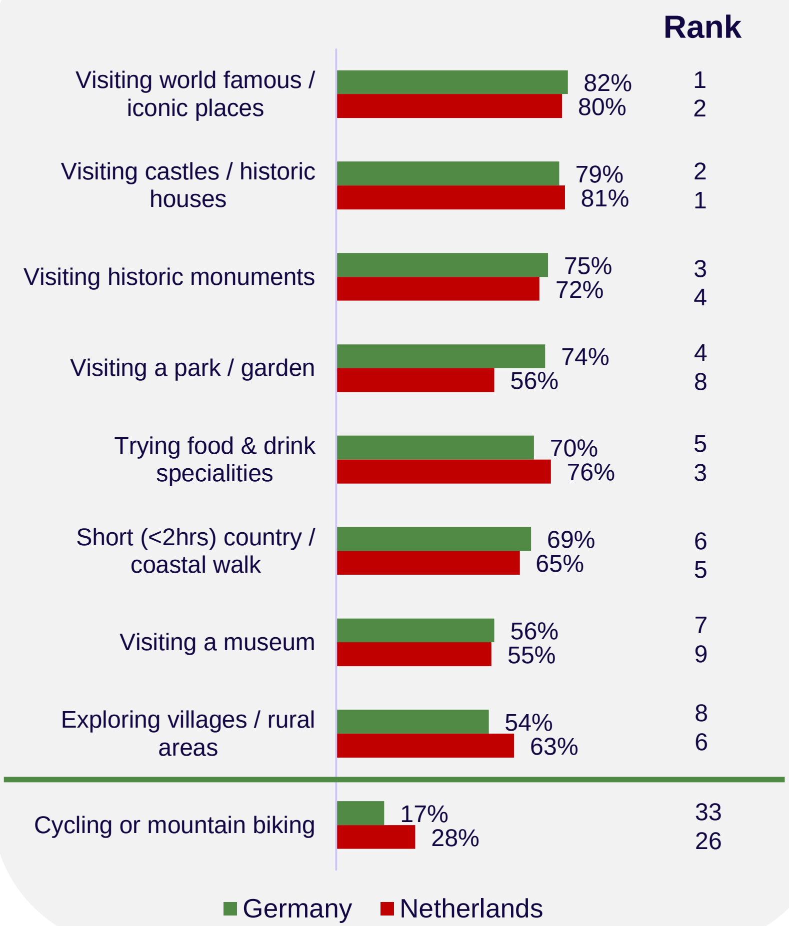
Definitions:

- Challenge and / or action include adrenalin activities, water sports, **cycling or mountain biking**, competitive sports
- Outdoor Leisure Pursuits include playing golf, sunbathing, boating, exploring by E-Bike, short or long walks

Source: VisitBritain Market and Trade profiles

History and heritage based activities are more likely to be on their ‘to do list’ when on holiday in England; but that said, there is still sizable interest in cycling

Top 8 activities considered in England



- 28% of the Dutch would consider cycling whilst on holiday and 17% of Germans
  - In the Netherlands, consideration is skewed towards young males (18-34)
  - In Germany, consideration is skewed towards young people (18-34).

Likelihood to consider cycling on holiday in England

Market	% consideration* cycling holiday in England	Rank Activity (out of 40)	Visit Rank to Britain (2016)
China	38%	37	24
USA	32%	37	2
Italy	32%	32	7
Spain	30%	31	5
Netherlands	28%	26	6
France	27%	33	1
Germany	17%	33	3
Australia	16%	38	10
Norway	12%	36	16

*Definitely/very likely to consider

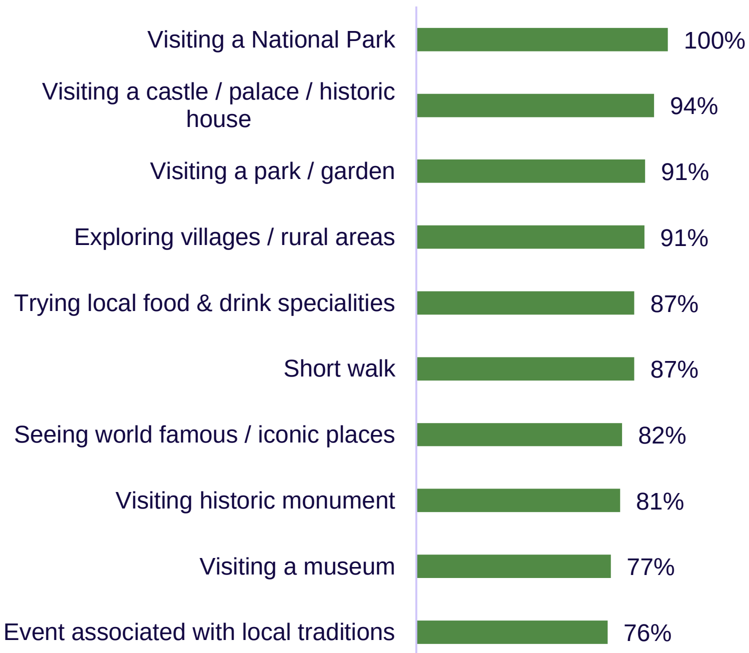
Source: Discover England Fund – Activities & Themes Research 2017

There is evidence to suggest that combining history & heritage and food & drink activities with cycling will be appealing across both target markets.

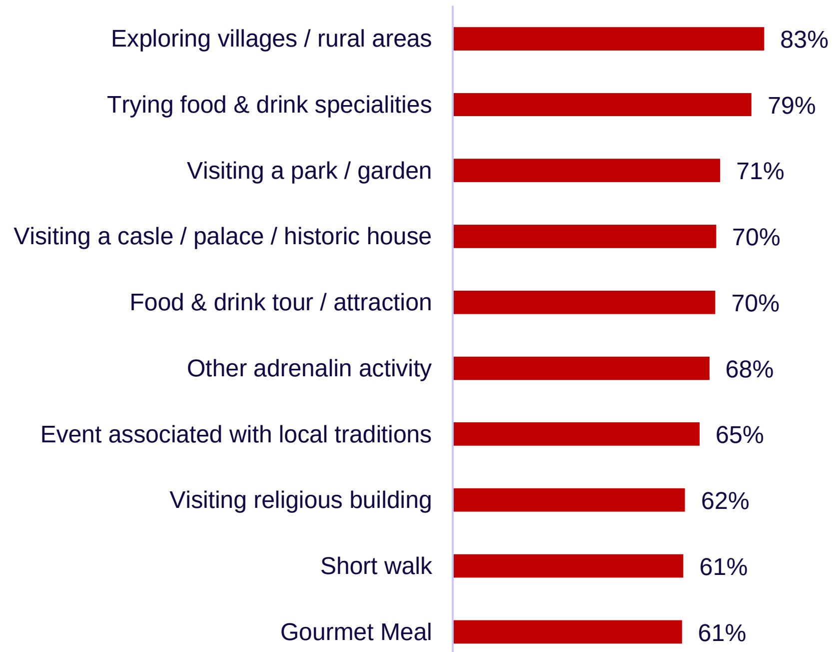
- The crossover of activities across the target markets is fairly similar – but there is evidence to suggest that those in the Netherlands may not understand the term 'National Parks'.

Among those who would cycle on holiday what other activities would they consider

Germany



Netherlands

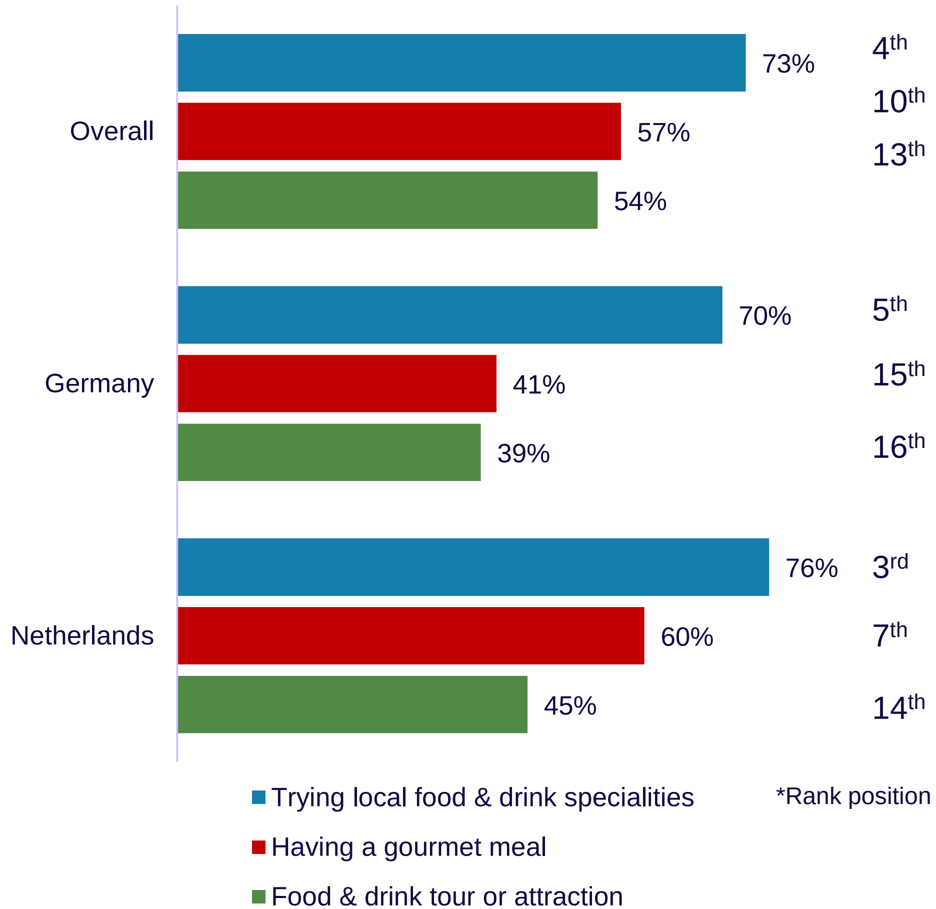


Source: Discover England Fund – Activities & Themes Research 2017

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



*Rank position among a list of 40 activities

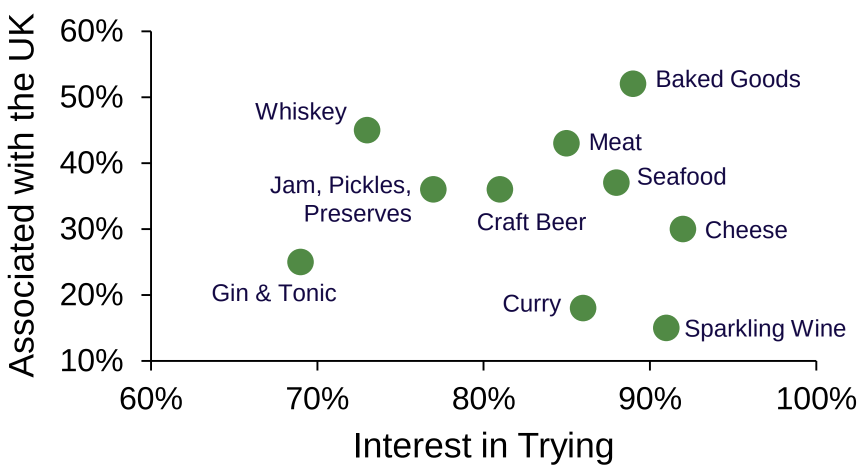
- That said, more than 2 in 5 from each target market would consider a food & drink tour or attraction.
- 'Gourmet meals' are more likely to appeal to the Dutch audience but again still considered among the German market (albeit ranks much lower than other activities).

Source: Discover England Fund – Activities & Themes Research 2017

There is high interest in trying a number of local food & drink specialities – and visiting the 'pub' appeals to both markets

- 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.

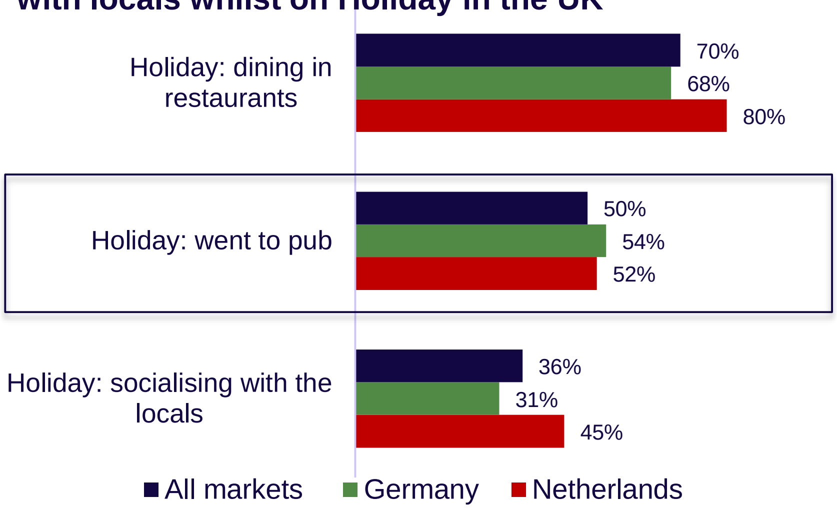
Local Food & Drink Specialist – Association with UK by Interest in Trying (all markets)



Source: VisitBritain Food & Drink Research, 2017

- 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



Source: VisitBritain Market & Trade profiles

Concept testing demonstrates the niche appeal of this proposition across both target markets. To appeal more to the average cyclists, there must be more relaxation breaks built into the itineraries

Wording Used in the Concept Test:

Introducing Cycle England

As a keen cyclist, I look for interesting and challenging holidays that will test my cycling ability, not my organisational ability – I want to focus on the actual riding!

Introducing Cycle England, serious cycling breaks for dedicated enthusiasts who want to take on some of the most challenging English cycle routes and not to worry about all the logistics. We've carefully designed the experience so that all you have to do is ride!

With routes from the Tour de France and Tour de Yorkshire, the Tour of the Wolds and The Eroica Britannia, Cycle England encompasses all booking and travel arrangements and has been built on a sound understanding of what the serious cyclist needs for an enjoying and challenging holiday. From booking your trip and transporting your bike, to full route planning and support, and of course luggage transfer, you'll be staying in cycle friendly hotels with secure storage, laundry facilities, and easy access to specialist services and advice.

Cycle England…cycle like a champion

Positive take-outs

Combine sports and travel and you'll see the surroundings fantastic!

Biking through beautiful areas

To be free in nature and to reveal more facets of the country

Your own bike can accompany you.

That I do some sport, because I often do not

Concerns

- Not seen as unique or unique to England
- Too stressful for a holiday experience
- Ease of getting around

Too much sport and rain

Eventual stress, no time to visit in peace

Everything - it is simply too specific for a target group to which I do not belong

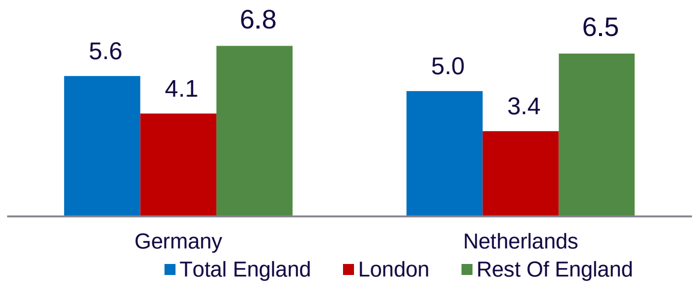
Not a real vacation, rather sports holiday for sporty very active people. Considering that everything is too structured, no real relaxation or change, apart from the changing places / landscapes.

Even if I like cycling in my spare time, this would be too strenuous for a holiday.

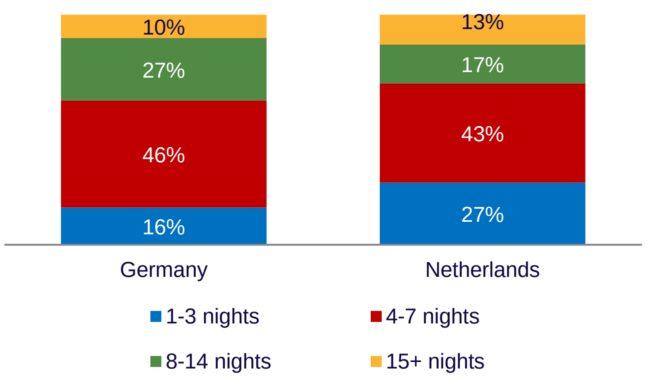
Source: Gourmet Garden Trails Concept Testing

The average length of stay across both markets in regional England suggests the shorter itineraries that are planned (3 to 5 days) are likely to fit well

Average number of nights stayed in England (2015)



Duration of stay in England (2015)



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

- On average, visitors from Germany and Netherlands stay around 6 days in regional England
- Those in Germany are slightly more likely to have followed a self-guided route / itinerary than the Dutch – but it is still relatively high among the Dutch.
- N.B. This question asked does not specifically relate to cycling holidays

Exploring / seeing sights on holiday: Always / Frequently do		18-34 yrs No children	35-54 yrs No children	55+ yrs No children
Exploring independently with no set plan	57% 54%	53% 55%	67% 57%	57% 52%
Follow a self-guided route / itinerary e.g. from a guide book	46% 37%	43% 36%	50% 37%	45% 34%

■ Germany ■ Netherlands

Source: DEF Themes and Activities Research 2017

Cycling Case Study: The Vennbahn route

What it is

- The Vennbahn Cycle Route is Europe's longest disused railway cycle path. Developed as a tourism product, using the rail bed and associated infrastructure of tunnels and bridges, the region's scenic beauty and its cultural heritage.
- The cycle trail stretches 125km from Aachen in Germany, through east Belgium ending in Luxembourg.

Key success factors

1. The natural environment
2. Infrastructure
3. Services
4. Marketing

A well-defined brand mark has been developed and is core to all marketing and signage activities throughout the length of the Vennbahn.

Marketing actions

1. Website
- Everything needed to plan a tour
- All-inclusive packages
- No online booking, but visitors directed to travel agents and operators for bookings

2. App
- Developed in April 2016
- Useful information, such as routes, signs, rest stops, topography, attractions and lodging
- Estimate time and distance to destination

3. Tour Planner
- A box of maps and detailed information on all associated attractions for the 16 regional connection routes

4. Map
- A useful brochure, including 1:100,000 scale route map
- Contains useful information on/around the Vennbahn

5. Information boards
- Detailed maps
- Local information

6. Signage
- Clear and consistent
- Throughout the entire route

7. Storytelling
- Also a core element of visitor experience
- History of each section portrayed
- User-friendly, background on heritage, local history

8. Complementary products
- Products are currently being developed
- Audio tours
- Vennbahn film

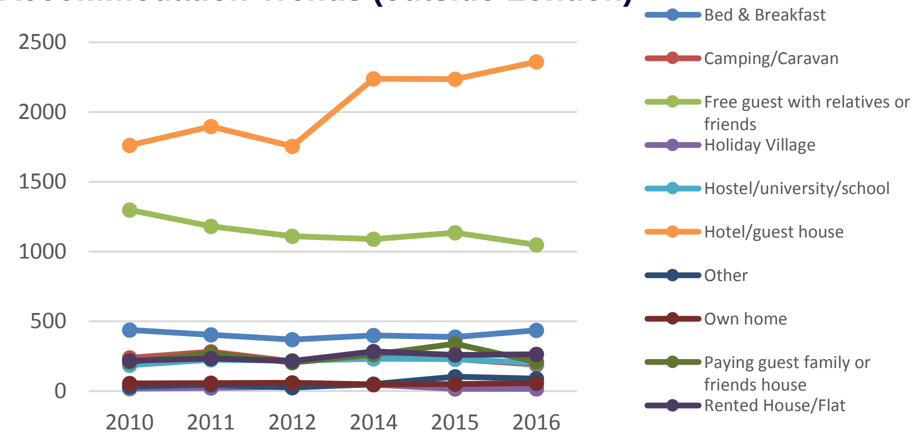
Marketing actions

How to optimise the Cycle England Experience

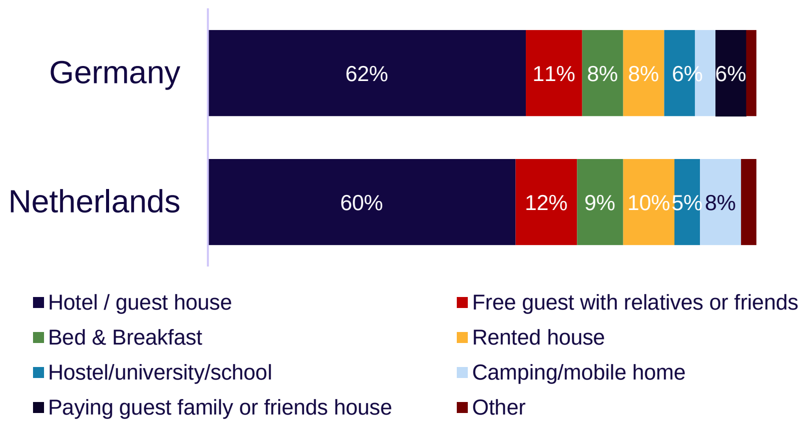
Accommodation

Among all holiday visitors, accommodation is currently dominated in volume terms by mainstream hotels

Accommodation Trends (outside London)



Accommodation Type – All UK



- 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.

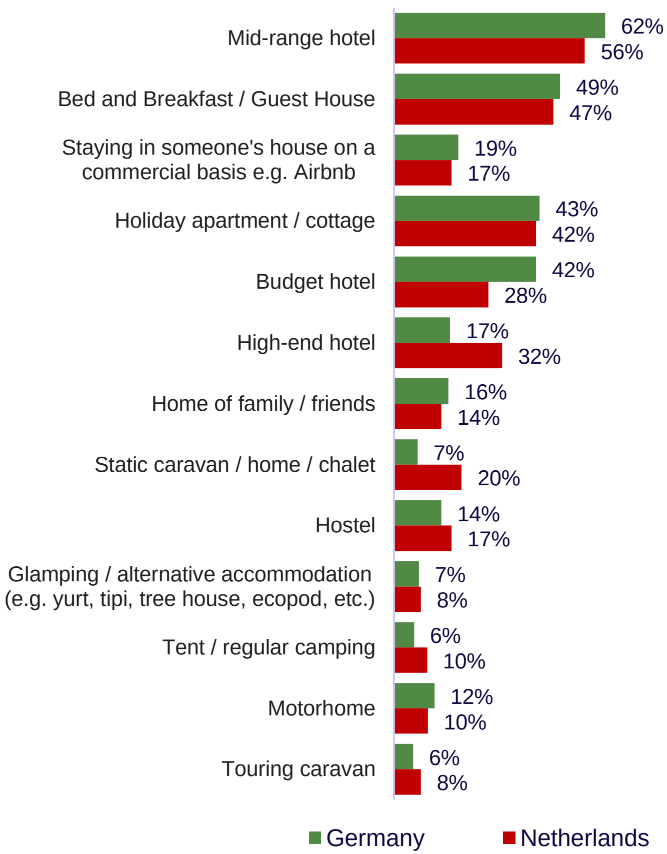
Considerations

- 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/alterative accommodation types that form part of the 'authentic/real' England experience.

DEF Activities & Themes Research, 2017

The types of accommodation considered among those interested in challenge / action holidays illustrates the potential for a range of diverse options

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



Among those who consider Challenge / or Action Activities

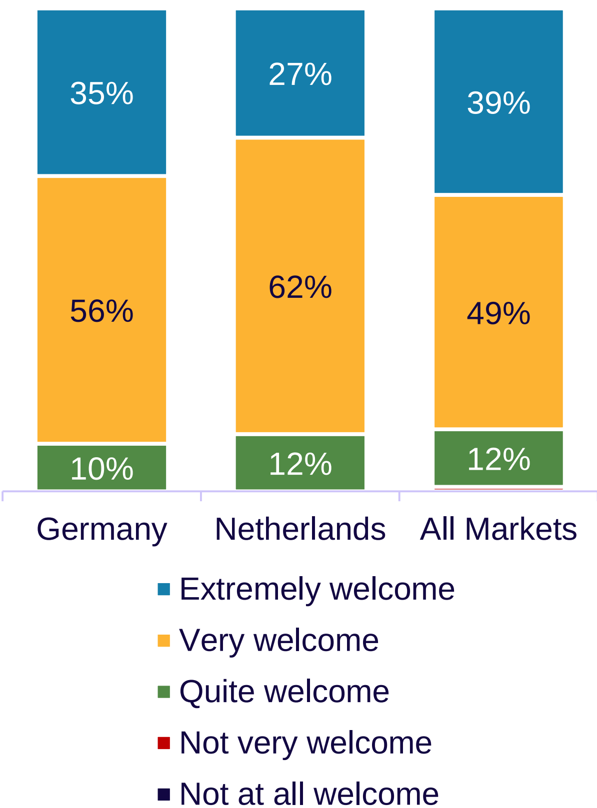
Germany	Netherlands
60%	44%
46%	42%
24%	19%
47%	37%
41%	24%
23%	**41%**
24%	19%
15%	18%
22%	**20%**
12%	**12%**
11%	**13%**
19%	**13%**
14%	**16%**

- Hotels are overall the most considered accommodation option at a market level.
  - Mid-range hotels are most popular but there is still a significant minority interested in high end (especially Netherlands) and/or budget hotels (Germans).
- Among those who would partake in more challenging activities (including cycling), other accommodation options are also considered
  - Interest in hostels and camping / caravans options increase
- 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.

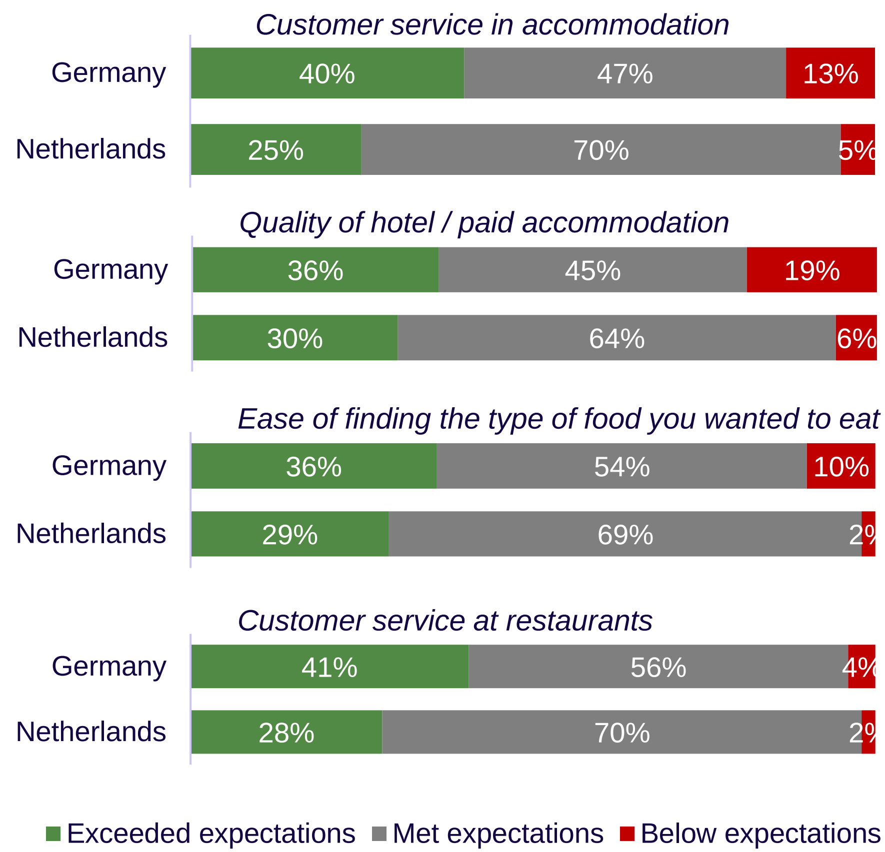
Source: DEF Themes and Activities Research 2017

The majority of visitors to 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?



Source: Source: CAA Passenger Study 2015

Further understanding is required as to whether alternative accommodation providers (i.e. campsites, hostels) would be able to cater for cyclists

Overview of the Yorkshire Cycling Charter

The charter has 23 Welcome to Yorkshire principles. Below we have summarised the key ones relating to cycling that establishments or companies are asked to adhere to:

Secure and convenient bike parking	Lockable undercover area for storage of bicycles and panniers
Bike washing facilities with a hard standing area	A suitable place to dry wet weather clothing
First Aid kit available to all cyclists	Emergency cycle and puncture repair kit
Details of nearest cycle hire outlets and cycle repair shops	Details for local rescue services including an explanation for overseas visitors
Weather information, telephone number or website address for up-to-date information	OS Maps, cycling books and leaflets, information on cycle trails and café stops
Local cycling route information leaflets	Sockets to charge phones and Garmin's at meal times and in reception areas

Source: http://sites.yorkshire.com/assets/CyclingCharter/Cycling%20Charter%20Accomodation.pdf

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.

Source: VisitBritain Market and Trade Profiles

How to optimise the Cycle England Experience

Using Technology

Social media is now part of everyday life

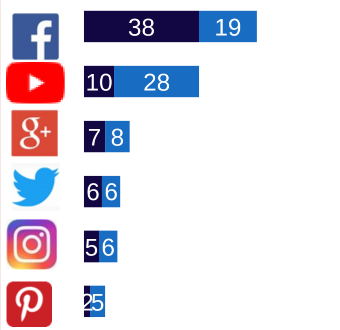
Social Media Usage

Daily Weekly

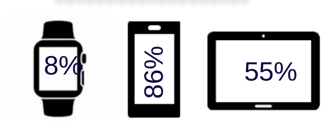
Facebook and YouTube dominate.

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

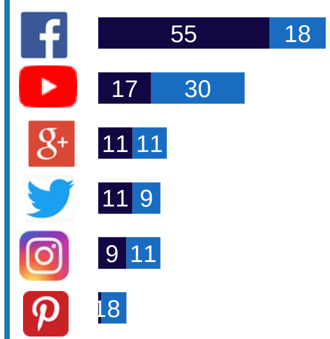
Germany (%)



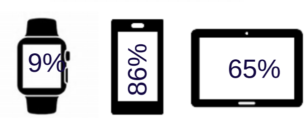
Passive usage for news etc. Least like to post themselves (11%) or follow brands (14%)



Netherlands (%)



Activity is generally around accessing news and liking/sharing others posts



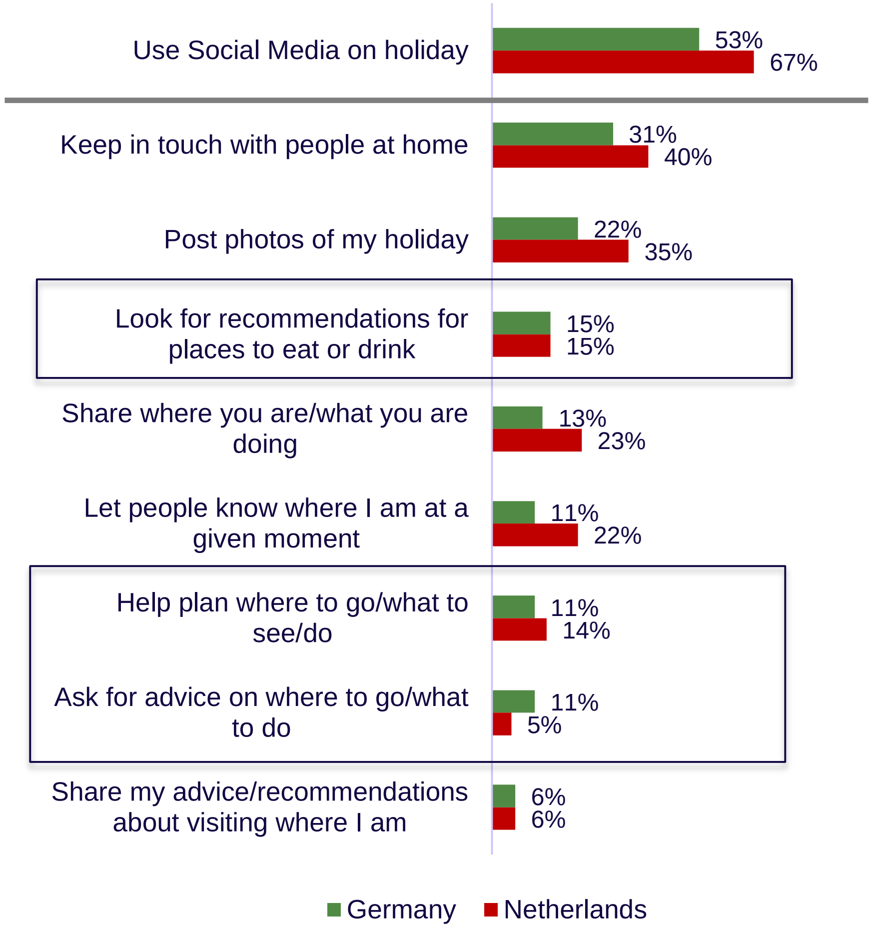
Tech ownership
Smart phone is almost universal, over half have a tablet. Smart watches are owned by less than one in ten.

- 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.

Source: Technology and Social Media, 2016

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 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.

Source: Technology and Social Media, 2016

Other destinations have apps in support of their cycling proposition

- The increasing ownership of smart phones and the obvious need for maps when cycling on new routes has resulted in the development of a vast number of cycling apps. These allow users to easily track and record rides, navigate and plan routes, keep on top of training and the more tourism oriented apps also provide information on points of interest, accommodation and services along the way.

Google Maps

- Cycling routes have been offered for some time, and it can provide the prized turn-by-turn navigation instructions if required.

Strava

- The "go-to" app for cycling. Top features are: "segments" for comparison with others, follow weekly progress of friends, join clubs, join challenges. Includes serious cycle touring options (eg GPS, GPX, lodging)

VisitDenmark BIKE & STAY

- Works offline and gives access to route maps, recommended experiences and campsites along the 26 Panorama cycle routes through Denmark. Routes are short, scenic, tailored to day trips.

Vendée Vélo

- Detailed information on all 70 cycling paths in Vendée, western France. Practical information, lists nearby tourist sites. Download by QR code featured on the cycling path road signs.

Cycling the Alps

- Provides details of many of the cycling passes in the Alps. This app allows users to see the complete pass from a bird's eye view with Google Earth Tour.

Cycle Ireland

- 100 of the most scenic routes in the country, passing many top attractions, covering 7000 kms. App includes photos, videos and route descriptions that can be viewed on both the Cycleireland.ie website and the App.

Word of caution: National Cycle network (developed by Sustrans), detailed more than 25,000 miles of British cycling and walking routes. It was withdrawn due to the high cost of updating content.

How to optimise the Cycle England Experience

The Purchase Journey

There are four stages to the planning process

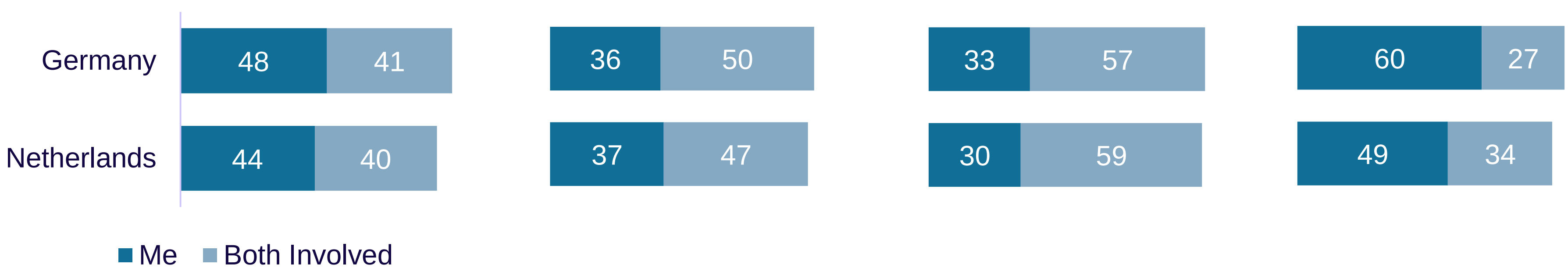
- Finalising the holiday (final choice or booking) is more likely to be carried out by men. Those aged 25-44 are more likely to say that they make the final decision solely; however, making the booking varies less with age.
- There are no age or gender differences for researching destinations or shortlisting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

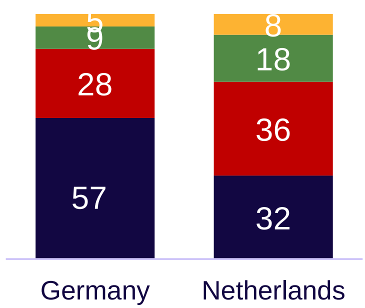


Source: VisitBritain Researching and Planning Research, 2016, The Future Travel Journey

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

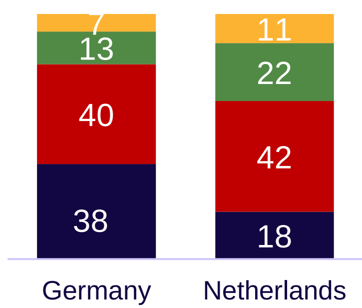
Started thinking about their trip (%)

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



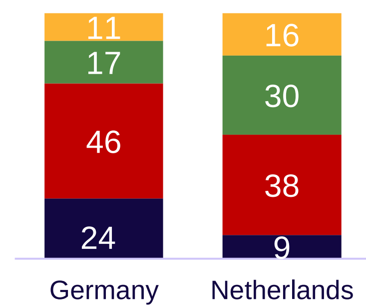
Decided on the destination (%)

- 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.



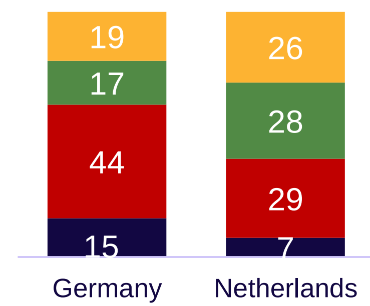
Looked at options / prices (%)

- Typically between 3 and 6 months before.
- Those in the Netherlands 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.



More than 6 months before | 3-6 months before | 1-2 months before | Less than 1 month before

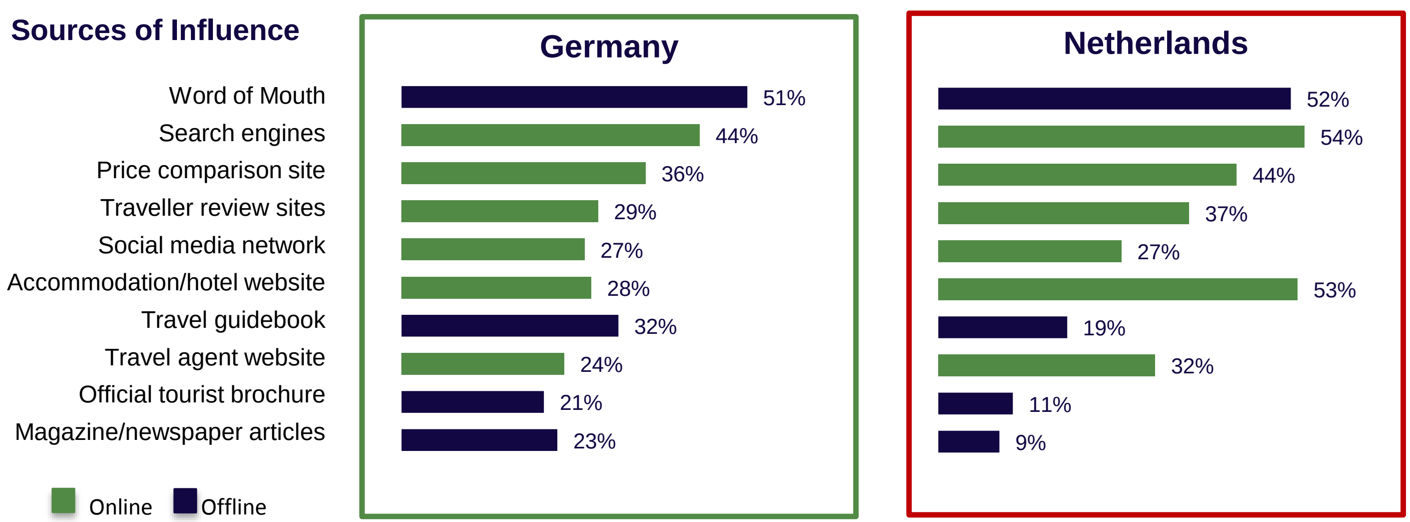
Age: 65+ year old's are most likely to decide furthest in advance across all the stages. The majority of those in the target group (45+ year olds) have booked between 3 to 6 months in advance.

Source: VisitBritain Researching and Planning Research, 2016

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 are more likely to use travel guidebooks and official tourist brochures than the Dutch

Top Sources of Influence on destination

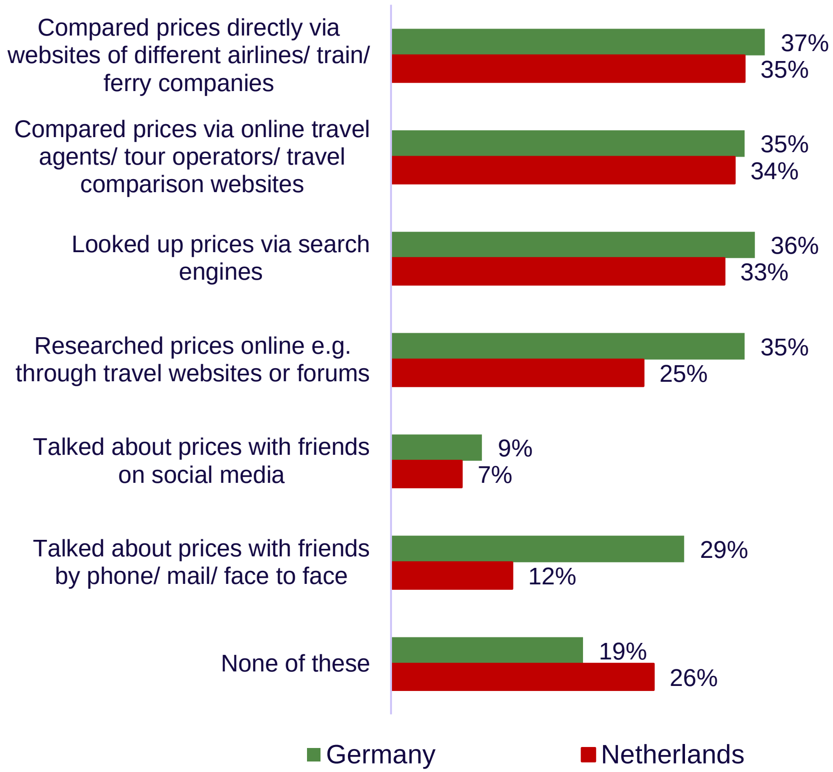


Source: VisitBritain Researching and Planning Research, 2016

Online Travel Agents play a role when researching holidays but the Germans are more likely to book this type of product through a specialised tour operator

- OTAs play a significant role in enabling travellers to be confident with the price they are paying – and support the research process.

% who would do this before booking a holiday to Britain



Source: VisitBritain Decisions & Influences Research, 2016, Inbound consumer sentiment research

Top 5 Booking Channels *for the Cycle England concept*

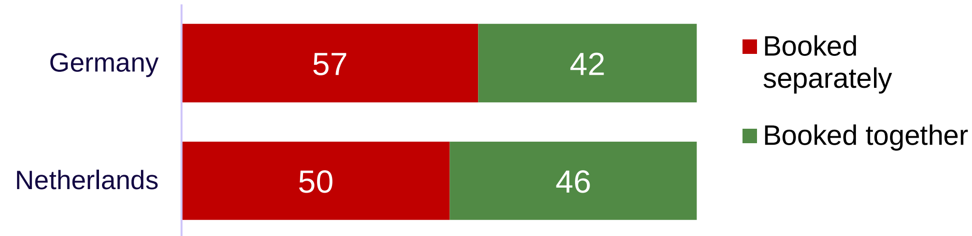
Germany		Average*	Netherlands		Average*
Specialised tour operator	40%	36%	Traditional travel agent website	26%	28%
Using travel agent's shop	32%	36%	With the accommodation provider	26%	28%
Traditional travel agent website	22%	24%	Using travel agent's shop	25%	25%
Online tour operator/ comparison website	17%	20%	Specialised tour operator	25%	23%
Search engines with booking facilities	16%	16%	Online travel and reviews website	19%	20%

Source: Cycle England Concept Testing
**Average across all the concepts tested, not representative*

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).



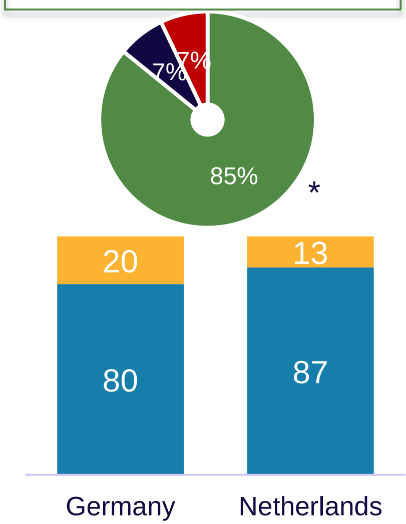
Transport

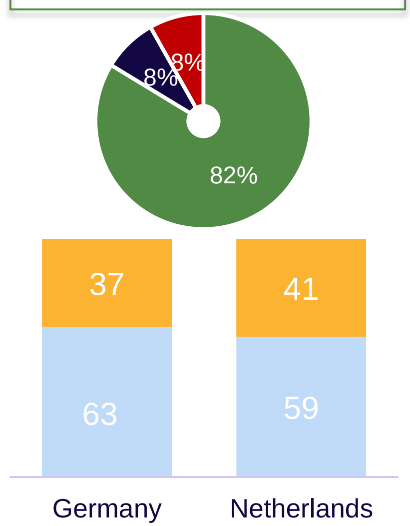
Accommodation

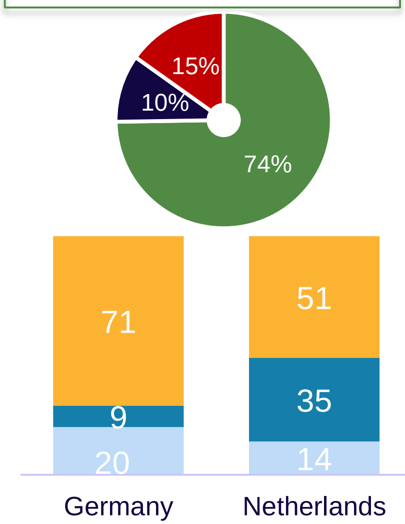
Package (Travel & Accommodation)

% Booked Online

	Transport		Accommodation		Package (Travel & Accommodation)	
% Booked Online	82%	94%	72%	72%	58%	81%







Direct with travel / transport provider

Direct with accommodation provider

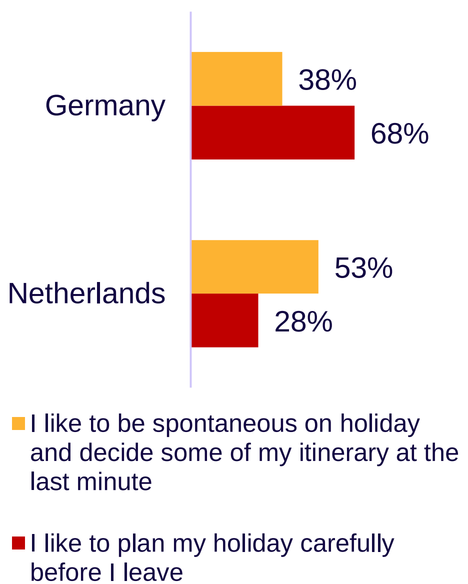
Through a travel agent / tour operator / comparison website

Source: VisitBritain Researching and Planning Research, 2016
*Total all markets in study, not just Germany and Netherlands

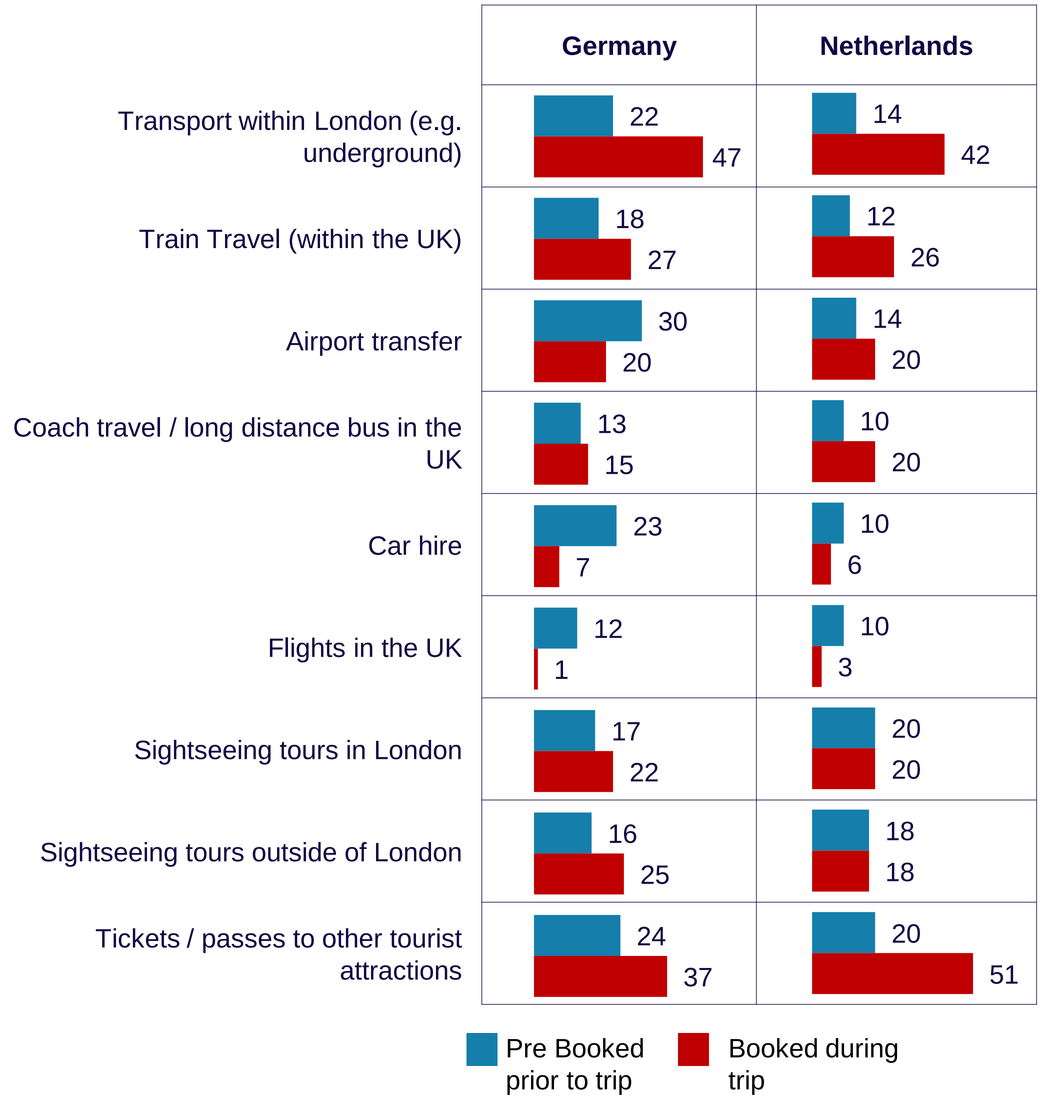
The Germans are much more likely to plan their holidays carefully before they leave – but booking activities / experiences is much more likely to be done during their trip

Itinerary planning vs. spontaneity

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



Pre-bookable transport / activities



Source: VisitBritain Decisions & Influences Research, 2016

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.

Source: VisitBritain Market and Trade profiles

How to optimise the Cycle England Experience

Travel Trade

VisitEngland XV Insight

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

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 a 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)
- More developing of the existing offer rather than radical new (see following).
- Clear transport information and support.
- Raise awareness through joint marketing.
  - Trade rates
  - Price stability
  - Release periods on room allocations
  - Centralised booking mechanisms
  - Single point of contact
  - Make use of DMCs
  - Greater language capability among handlers/guides (German)

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 transport is required with clear signage.

Source: Discover England Fund Travel Trade Research, 2016

Overcoming concerns of quality and the value of some accommodation providers is also key when engaging with 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).
- 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&Bs, cottages.
- Ideally more language capabilities (German).
- Focus on off-peak, whilst Peak capacity remains an issue.

Source: England Occupancy Survey August 2017, DEF Travel Trade Research June 2017

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

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.

Source: Euromonitor 100 Cities WTM 2017, DEF Travel Trade Research June 2017

Summary – key take-outs

How can Cycle England optimise the proposition?

1. Promoting Yorkshire / Lincolnshire

- 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 in Yorkshire / Lincolnshire

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.
- Journey times from airports and seaports highlight the optimum entry points for each proposed itinerary – but **multiple entry points need to be highlighted in communication** given airport capacity and limited scheduled flights from cities in Germany and the Netherlands to regional airports.
- Exploring **partnerships with multiple cycle tour operators** (even those who do not currently offer routes in your locations) to support delivery of the proposition and address any 'last mile' challenges is encouraged.

3. Building an appealing cycling product

- Cycling is a niche product but there is still **sizable interest in both markets**. To **appeal more to the average cyclists, there must be more relaxation breaks built into the itineraries.**
- There is evidence to suggest that **combining history & heritage and food & drink activities with cycling will be appealing across both target markets** – in support of the itineraries already designed.

How can Cycle England optimise the proposition?

4. Accommodation

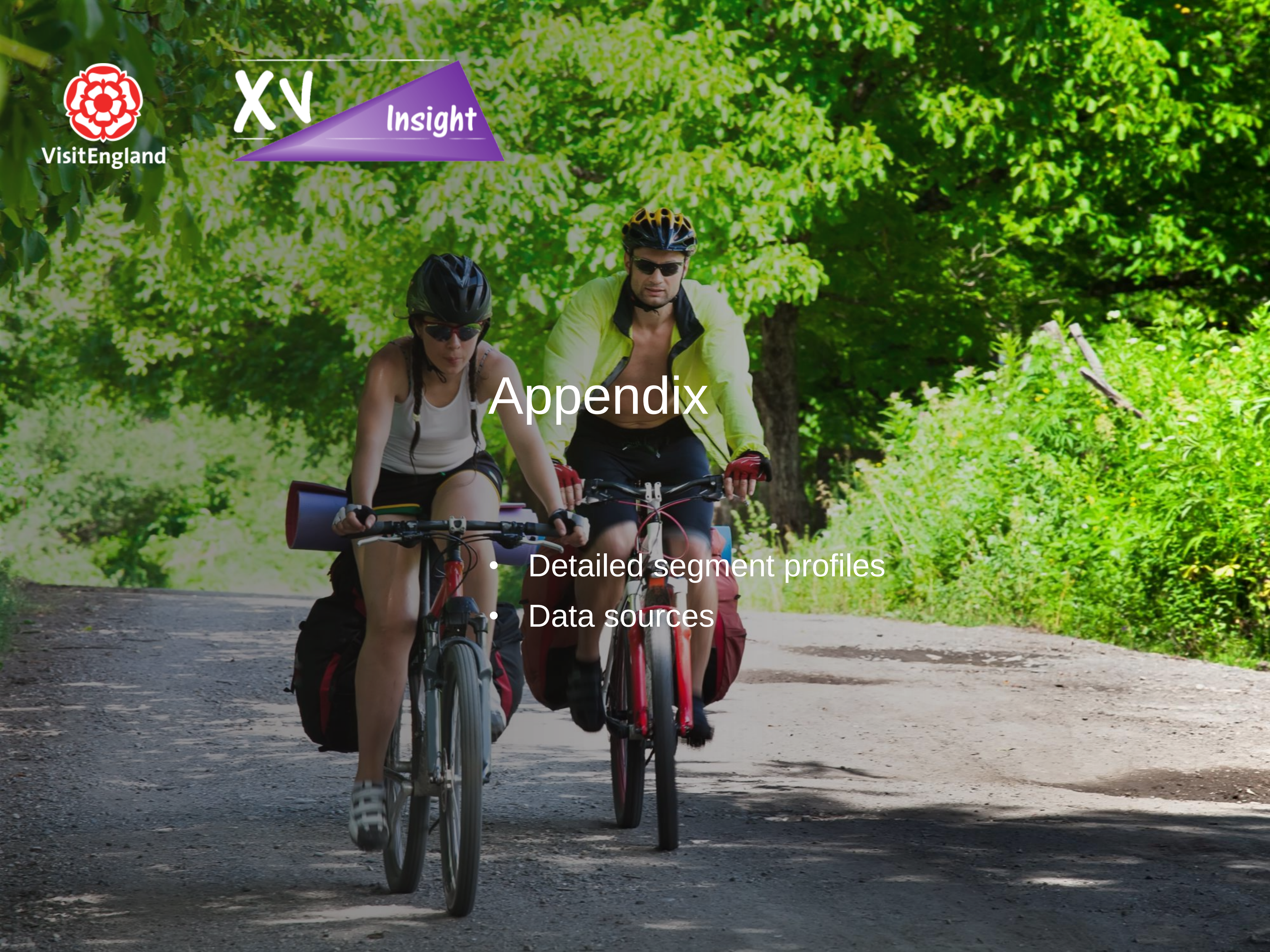
- The types of accommodation considered among those interested in cycling illustrates the **potential for a range of diverse options** (from high end hotels to budget hotels, hostels and camping).
- It will be important to choose the right accommodation providers to partner with – **those who can offer quality at a good value and those who have the ability to cater to cyclists needs.**
- **Communicate to accommodation and experience providers the similarities and differences of expectations by market** i.e. no carpet in the bathroom for Germans

5. Using Technology

- Consider ways to **maximise opportunities that exist on social media** platforms to communicate and promote your propositions.
- Other destinations have **apps in support of their cycling proposition** – this should be carefully considered for Cycle England.

6. The booking experience / travel trade

- Booking is an online dominated process, however, there is evidence to suggest that Germans may **prefer to book through a specialist tour operator**. This is less obvious in the Netherlands.
- 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

- Cycle England have targeted **Young Active Explorers**, **Outdoor Enthusiasts** and **Lifestyle Travellers.**
- 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 several segments that map closest to the previous segments. They are **Adventurers** and **Buzzseekers** (see next slides for profiles).

	Young Active Explorers	Outdoor Enthusiasts	Lifestyle Travellers
Profile	18-34 years Singles or pre-nesters Young professionals and students	35-55 years Families/Empty nesters ABC1	50-65+ years Empty nesters, may be retired
Key Markets	Australia,Germany, India, Nordics, Spain	Germany, France, Spain	Australia, Framce, Germany, Spain, USA
Defining attitudes & traits	Open minded, adventurous. Seeking new experiences, spontaneous, technology, trend & fashion-led. Live for the moment and seek fun & excitement Highly social and connected	Active, nature lovers, cycling, curious, off-the-beaten-track	Young at heart, keen to learn, considered and conscious – like to plan
Key interests	Travel, music, technology, experiencing new cultures, meeting new people	Walking, hiking, cycling, time close to nature	Staying healthy & active, outdoors/nature, high culture, walking/hiking,
Travel preferences	Short breaks, city/urban destinations, activity/ action focused, tours & multi-destinations, independent online booking	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

Source: VisitBritain Segmentation

Segment Targeting Summary – Two core segments

	Adventurers	Buzzseekers	Explorers	Culture Buffs	Sightseers
	• 45+	• 18 - 34 • Australia, Germany, France India, USA, Netherlands, Australia	• 55+ • Australia, Germany, France	• 25 - 54 • China	• 55+ • USA
	• Comfortable with who they are • Outdoors in natural landscapes • Off the beaten track • Seek out new experiences	• Seek new experiences • Action & excitement • Pay for once-in-a-lifetime • Trendsetters	• Comfortable with who they are • Slower relaxed pace • Like to go places that don't attract tourists	• Care about the image they project • Travel is reward for hard work • Demand worlds leading sights	• Cities • Creatures of habit • Sensible
	• Local food & drink • Rural life & scenery • Famous/iconic places • History & heritage • Outdoor leisure pursuits	• Famous/iconic places • Local food & drink • Challenge/action filled • Hands on learning	• Local food & drink • Rural life & scenery • Famous/iconic places • Outdoor leisure pursuits • Visiting parks & gardens	• Local food & drink • Famous/iconic places	• Local food & drink • Famous/iconic places • Experiencing city life
	• B&B	• Airbnb, camp, alternative accommodation	• B&B/Self-catering	• Mainstream hotels/B&B	• Mainstream hotel only
	• Friends & family • Websites	• Friends & family • Trusted influential • Mobile- natives • Spontaneous	• Friends & family • Movies, books, magazines & travel agents	• Friends & family • Travel in groups or families	• Friends & family • Websites & travel agents • Deal-seekers
	• Outdoor Enthusiast • Mature Experience Seekers	• Young Active Explorers • Lifestyle Travellers	• Mature Experience Seekers • Outdoor Enthusiast	• Lifestyle Travellers • Cultural Adventurers	• Conservative Retirees
	• Core	• Core			

Source: VisitBritain Segmentation, 2017

ADVENTURERS

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.

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

Source: VisitBritain Segmentation, 2017

BUZZSEEKERS

AGE
- **Most (64%) 18-34yrs**

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

KEY MARKETS
- India, France, Germany, Netherlands Australia, USA

GENDER
- 56% Male

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

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

UNIQUE TRAVEL ACTIVITIES
(versus other segments, but still niche)
- Challenge or action-filled activities
- Hands-on learning activities

GB LIKELY ACCOMMODATION
(unique vs others segments)
- Someone else's home (e.g. Airbnb)
- Tent or caravan
- Alternativee accommodation

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

WHO ARE THEY?

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

Source: VisitBritain Segmentation, 2017

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.

Source: VisitBritain Segmentation, 2017

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.

Source: VisitBritain Segmentation, 2017

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.

Source: VisitBritain Segmentation, 2017

Links to data sources

- VisitBritain Decisions & Influences Research, 2016
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- CAA Passenger survey 2015
- VisitBritain Market and Trade profiles
  - https://www.visitbritain.org/markets/


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