



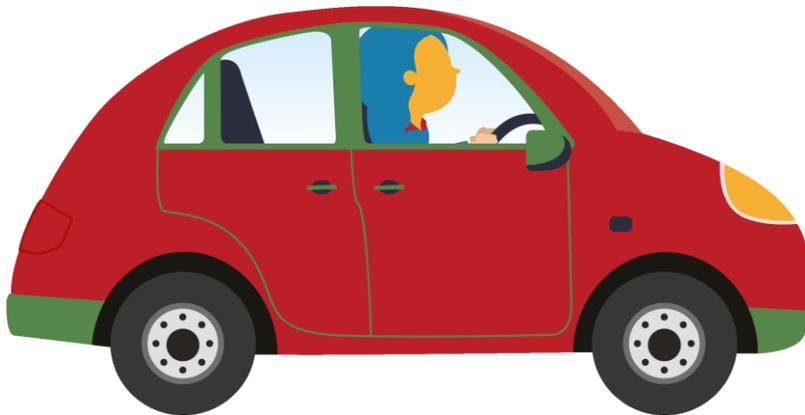
# Discover England Fund Research Summary Report

## East of England Touring Route March 2018



## Contents

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



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

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

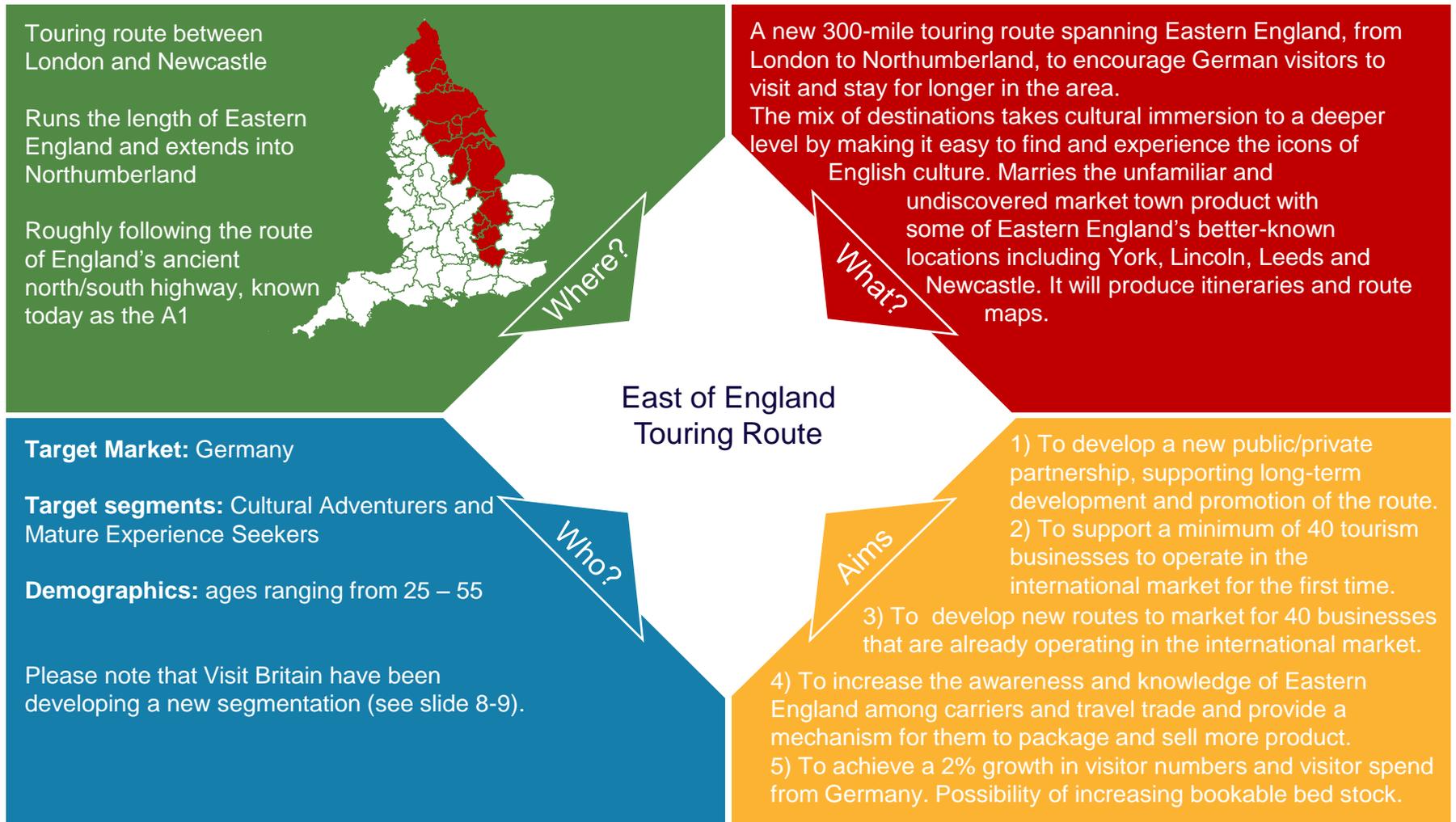


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Insight

# 1. Introduction

# Project Overview



# Product Development and Consumer Proposition

## What's on offer

- A new, 300-mile touring route between London and Newcastle, that runs the length of Eastern England and extends into Northumberland.
- Along this route the curious visitor will find a mixture of city destinations and market towns, local traditions and large-scale spectacles, classic historic properties and breath-taking rural vistas that provide a wealth of interesting experiences that together represent quintessential England
- The route is being developed for German visitors who will be encouraged to arrive by sea and air into Eastern England, north of London. They will be invited to tour the route which will be divided into easy to understand point-to-point sections that are comfortably travelled in 3-4 days by either car or rail: for example, London-Rutland, Rutland-York, York-Newcastle.
- Fundamental to this project is the offer of an authentic English experience, to meet the desire of German visitors to get to know what makes the English tick.

## Why touring?

- Touring is a familiar and favoured way to spend leisure and holiday time for Germans. Germany has a plethora of touring routes – nine in Bavaria alone, and over 100 across the country. This project takes a well-known German domestic holiday choice and presents an English version for those that are keen to explore another country and its culture
- Potential project partner, DFDS, has confirmed that visitors are already consuming touring routes in England. They have developed routes in Scotland and England's West Country specifically for the German market, and highlight the absence of similar routes in Eastern England

## Sample Itinerary 1: The English Way. Developed for Mature Experience Seekers

### Highlights

- Drink beer in English pubs
- Explore English Civil War
- River lunch cruise
- English chocolate making

### Visiting

- Oakham
- Stamford
- Grantham
- Nottingham
- Newark-on-Trent
- York

### Itinerary - sights and key stops

- Stamford walking tour
- Lunch at Bull and Swan, a former coaching inn
- Afternoon tea and Croquet at Barnsdale Gardens
- Clipsham Yew Tree Avenue
- Angel and Royal – one of Britain’s oldest inns
- Belvoir Castle
- Colston Bassett Dairy
- Ye Olde Trip to Jerusalem – tour of oldest pub in England
- Nottingham City of Caves
- Lunch cruise on the River Trent
- Newark National Civil War Centre
- Brodsworth Hall & Gardens
- York Walmgate Ale House
- York Chocolate Story

### Key facts:



4 days



2,199 for 2 people

40%

itinerary elements currently work with travel trade



Self drive



Arrive Port of Harwich



329 miles



Depart Port of Hull

## Sample Itinerary 2: The English Way. Developed for Cultural Adventurers

### Highlights

- Discover England in 1842
- Fly birds of prey
- Take a cycle tour
- Dine at Medieval banquet

### Visiting

- Leeds
- Ripon
- Darlington
- Gateshead
- Newcastle-upon-Tyne

### Itinerary - sights and key stops

- Thackray Medical Museum
- Man Behind the Curtain Seven course tasting menu
- Kirkgate Market
- Himalayan Garden & Sculpture Park
- Lunch at Royal Oak 18th century pub
- Walworth Castle Birds of Prey Centre
- Raby Hunt Inn – 2 Michelin star restaurant
- Angel of the North
- Tour of this Georgian Gibside estate
- Cycling with Saddle Skedaddle
- Blackfriars Medieval Banquet

### Key facts:



**3** days



**1,356**  
for 2 people

**54%**

itinerary elements  
currently work with  
travel trade



Self  
drive



Arrive Leeds or  
Bradford airport



**175** miles



Depart  
Newcastle airport

## New Segmentation: During 2017, Visit Britain developed a new segmentation which will provide greater insight into profiles, travel attitudes and behaviours

- In the new segmentation, there are five segments (see next slide for profiles). There are two segments in the German market that map back to the existing segments which the East of England Touring project team should focus on – these are **Explorers** and **Buzzseekers**.
- Please note, that there is not yet extensive data available for the new segments, but given the similarities to the new segments to the old segments, we are using the old segments as a proxy throughout this report.



### Old Segment: Mature experience seekers

Mature experience seekers map to **Explorers** in the new segmentation. They love to enjoy adventures, but are slightly more conservative than Adventurers in terms of what these adventures might entail.

**Explorers** are the largest segment in Germany (38%) - 35% of this group are between the ages of 25-55.



### Old Segment: Cultural adventurers

Cultural adventurers share many characteristics of the new **Culture Buffs** segment, but also some of those of **Sightseers** for older Cultural adventurers (55+) and **Buzzseekers** for the younger ones (<55 years of age). They will enjoy learning about culture and heritage in a fun and engaging way – they love individual experiences, but will still expect and want to see the most popular places/icons. **Buzzseekers** feel like the closest proxy group here, due to their age and openness to new experiences.

**Buzzseekers** are the second largest segment in Germany (22%) - 72% of this group are between the ages of 25-55.

Both Explorers and Buzzseekers have been identified by VisitBritain as priority segments for future marketing and targeting in Germany

## Profiles of the new segments: Explorers and Buzzseekers are the key targets

	Explorers	Buzzseekers	Culture Buffs	Sightseers	Adventurers
	<ul style="list-style-type: none"> <li>• 55+</li> <li>• Australia, Germany, France</li> </ul>	<ul style="list-style-type: none"> <li>• 18 - 34</li> <li>• Australia, Germany, France India, USA, Netherlands, Australia</li> </ul>	<ul style="list-style-type: none"> <li>• 25 - 54</li> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• 55+</li> <li>• USA</li> </ul>	<ul style="list-style-type: none"> <li>• 45+</li> </ul>
	<ul style="list-style-type: none"> <li>• Comfortable with who they are</li> <li>• Slower relaxed pace</li> <li>• Like to go places that don't attract tourists</li> </ul>	<ul style="list-style-type: none"> <li>• Seek new experiences</li> <li>• Action &amp; excitement</li> <li>• Pay for once-in-a-lifetime</li> <li>• Trendsetters</li> </ul>	<ul style="list-style-type: none"> <li>• Care about the image they project</li> <li>• Travel is reward for hard work</li> <li>• Demand worlds leading sights</li> </ul>	<ul style="list-style-type: none"> <li>• Cities</li> <li>• Creatures of habit</li> <li>• Sensible</li> </ul>	<ul style="list-style-type: none"> <li>• Comfortable with who they are</li> <li>• Outdoors in natural landscapes</li> <li>• Off the beaten track</li> <li>• Seek out new experiences</li> </ul>
	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Rural life &amp; scenery</li> <li>• Famous/iconic places</li> <li>• Outdoor leisure pursuits</li> <li>• Visiting parks &amp; gardens</li> </ul>	<ul style="list-style-type: none"> <li>• Famous/iconic places</li> <li>• Local food &amp; drink</li> <li>• Challenge/action filled</li> <li>• Hands on learning</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Famous/iconic places</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Famous/iconic places</li> <li>• Experiencing city life</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Rural life &amp; scenery</li> <li>• Famous/iconic places</li> <li>• History &amp; heritage</li> <li>• Outdoor leisure pursuits</li> </ul>
	<ul style="list-style-type: none"> <li>• B&amp;B/Self-catering</li> </ul>	<ul style="list-style-type: none"> <li>• Airbnb, camp, alternative accommodation</li> </ul>	<ul style="list-style-type: none"> <li>• Mainstream hotels/B&amp;B</li> </ul>	<ul style="list-style-type: none"> <li>• Mainstream hotel only</li> </ul>	<ul style="list-style-type: none"> <li>• B&amp;B</li> </ul>
	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Movies, books, magazines &amp; travel agents</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Trusted influential</li> <li>• Mobile- natives</li> <li>• Spontaneous</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Travel in groups or families</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Websites &amp; travel agents</li> <li>• Deal-seekers</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Websites</li> </ul>
	<ul style="list-style-type: none"> <li>• Mature Experience Seekers</li> <li>• Outdoor Enthusiast</li> </ul>	<ul style="list-style-type: none"> <li>• Young Active Explorers</li> <li>• Lifestyle Travellers</li> <li>• Cultural Adventurers</li> </ul>	<ul style="list-style-type: none"> <li>• Lifestyle Travellers</li> <li>• Cultural Adventurers</li> </ul>	<ul style="list-style-type: none"> <li>• Conservative Retirees</li> </ul>	<ul style="list-style-type: none"> <li>• Outdoor Enthusiast</li> <li>• Mature Experience Seekers</li> </ul>
	Cover 38% of German international traveller market	Cover 22% of German international traveller market	Cover 9% of German international traveller market	Cover 16% of German international traveller market	Cover 14% of German international traveller market

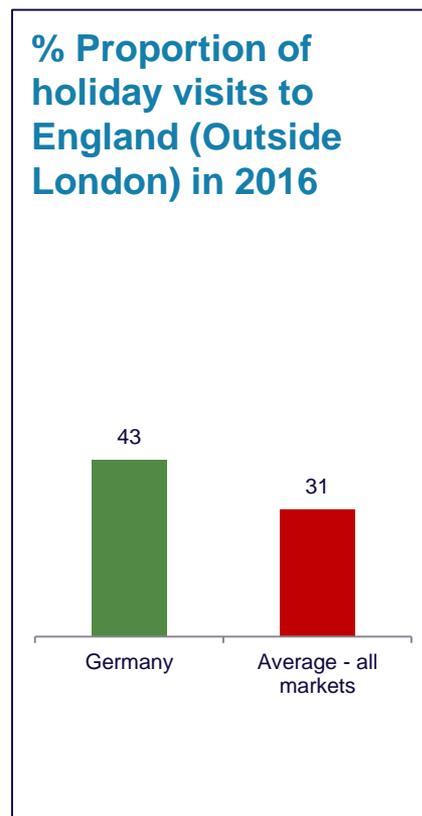
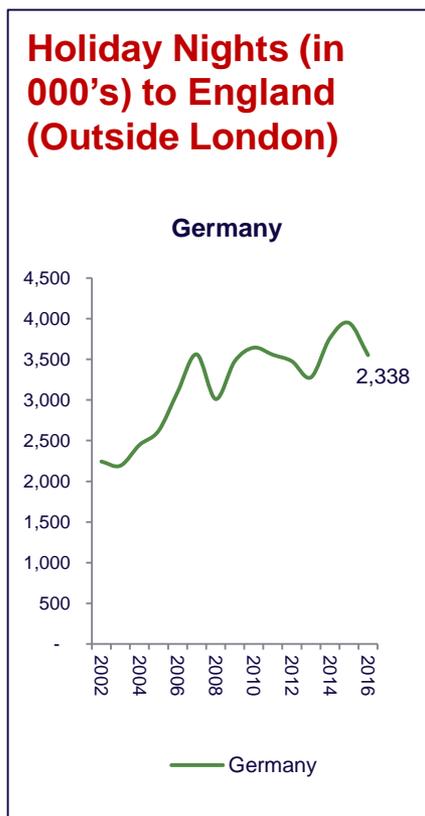


# Current Trends & Challenges



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

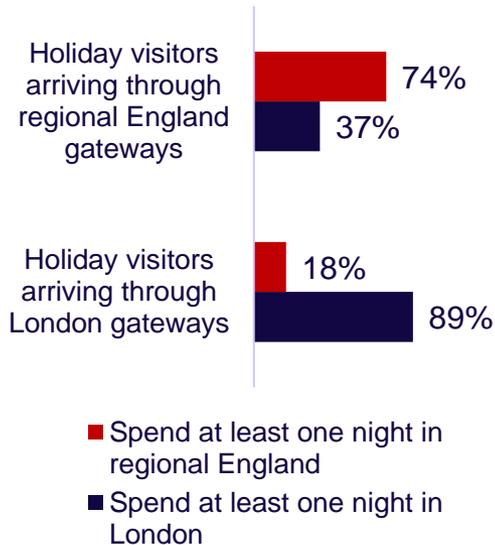
- Less than a third of all trips to England made by overseas visitors involve a stay outside of London.
- While visitors from Germany are more likely to visit regional England (at 43%), the proportion of holiday visits / nights stayed are higher in Southern regional England (see next slide).



- Visitor numbers and duration of stay inbound from Germany have dropped in 2016.
- Whilst volumes fell in 2016, there are some overall signs of growth again in 2017. In Q3 2017, all visits were up 4%.
- Visitors from Germany are more likely than average to travel beyond London.

# Regional Trends - The majority of visitors tend to stay in or close to the region they have entered, with London & the South dominating visits and nights stayed

## Where do they stay? (all markets)

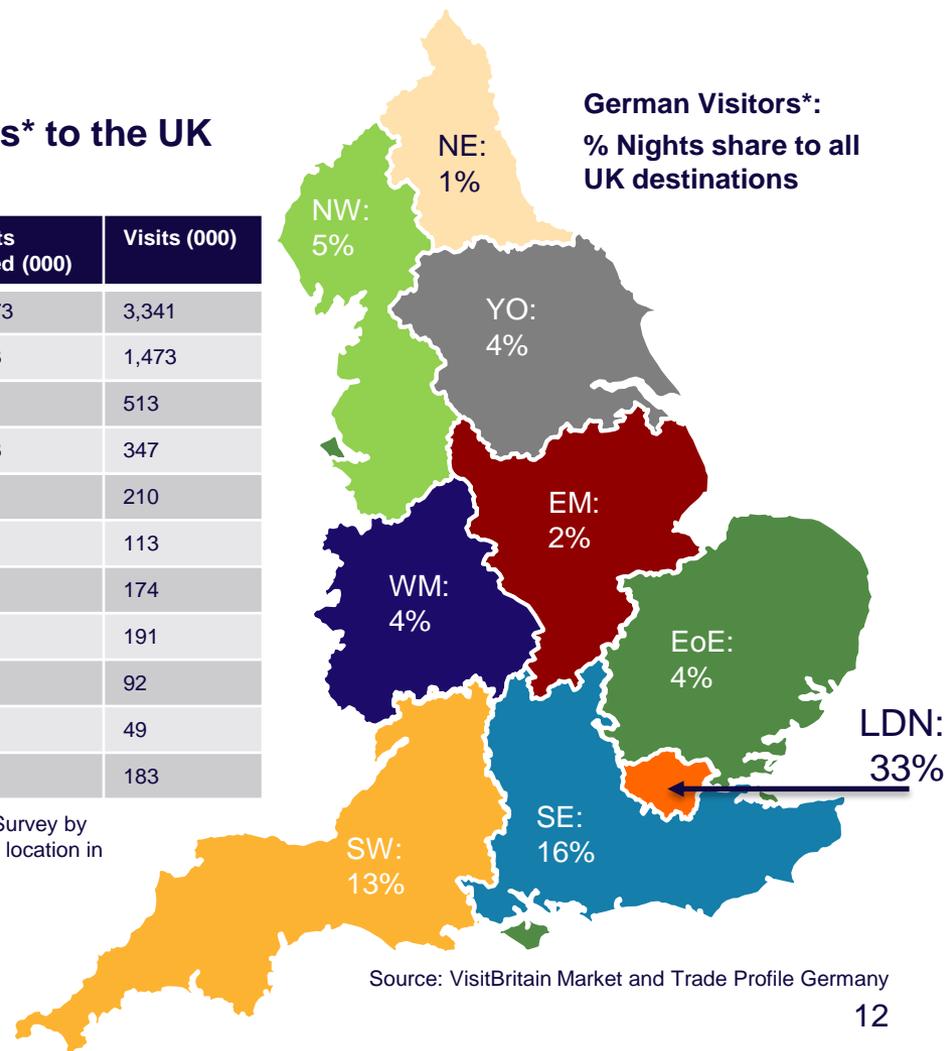


Source: IPS via Discover England Fund 'England's Gateways' report, 2016

## Germany: All visits\* to the UK in 2016

Region*	Nights stayed (000)	Visits (000)
Total	19,273	3,341
London (LDN)	6,333	1,473
South East (SE)	3,131	513
South West (SW)	2,443	347
North West (NW)	980	210
Yorkshire (YO)	837	113
East of England (EoE)	825	174
West Midlands (WM)	788	191
East Midlands (EM)	323	92
North East (NE)	209	49
Nil nights (Nil)*	N/A	183

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



Source: VisitBritain Market and Trade Profile Germany

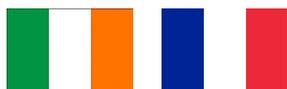
# Key challenges – Competition to attract inbound visitors comes from both international and domestic destinations. Increasing knowledge of regional England is key to address this challenge

## 1. Domestic and international competitors

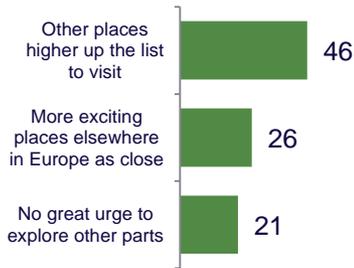
- As well as competing with other destinations, the dominance and perceptions of London have a wider impact on other destinations in Britain.

### 1. Competitor Destinations

Main competitor destinations when considering visit to Britain from Germany:



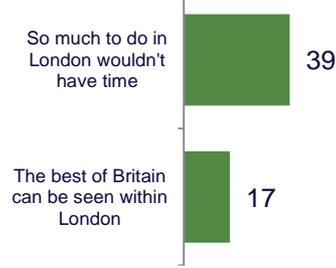
#### Reasons for not going beyond London (%)\*



### 2. Dominance of London

- The draw of London itself can deter visitors from going elsewhere in Britain
- Fewer people agree the best of Britain can be seen within London

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



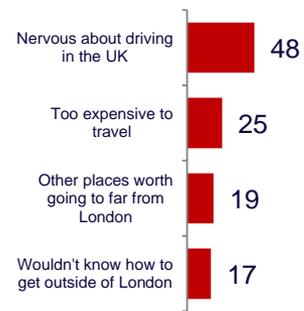
## 2. Growing travel to regional England

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

### 1. Address Transport concerns

- Providing clarity on 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

## Key challenges – The political, economic and social environment can also quickly change the appeal of any destination

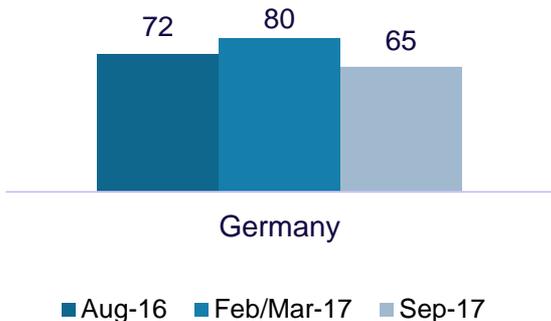
### Geopolitics: Safety / Security

“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 (%)

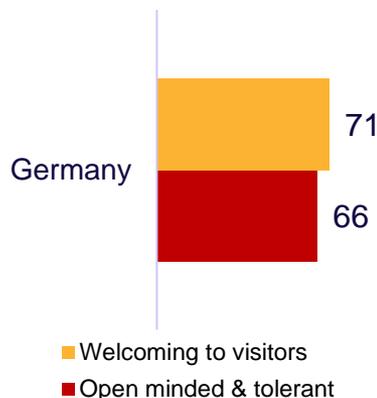


### Perceptions of Britain

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 (%)

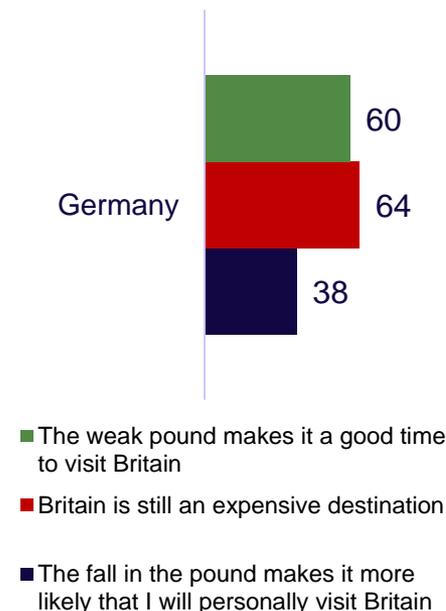


### Exchange Rate

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 (%)





VisitEngland

XV

Insight

# How to optimise the EETR experience

## Understanding the domestic and international competition

In recent years, promotion of touring routes in the UK has become more prevalent – any many touring routes already exist in destinations which are popular with German tourists

DOMESTIC  
COMPETITION



Ireland is popular destination among German tourists who are considering a holiday to Britain. Its touring route 'The Wild Atlantic Way' has become more established in recent years.



Germany is Scotland's second biggest market for visits. Development of the NC500 touring route (which can easily be accessed from Newcastle airport) has also been prevalent in recent years.

INTERNATIONAL  
COMPETITION



France is already a popular German destination and has a strong heritage of touring routes.



Other European destinations also provide alternative touring routes, which are closer to home for German visitors.

While not a touring route, we cannot forget about the **dominance of London as a destination**

The East of England Touring team can take learnings from established routes, including the Great West Way (another DEF project underway) by understanding what others have done that made the routes successful.

## Key learnings from touring routes close to us – Both Ireland and Scotland have established touring routes

- These benefit from an overarching brand, differentiating experiences with the ability to follow a set or DIY itinerary

### The Wild Atlantic Way, Ireland

#### What it is

- The Wild Atlantic Way is a tourism trail predominantly on the west coast of Ireland. The 1,553 mile driving route passes through nine counties and three provinces.
- Has three overarching themes: culture, landscape and seascape, personal renewal and discovery.

#### Key learnings

- ✓ A new overarching Brand
- ✓ Multi-region, covering 9 counties
- ✓ Strong depth/range of differentiating experiences
- ✓ Strong community support and engagement
- ✓ Dedicated consumer and trade website  
[www.wildatlanticway.com](http://www.wildatlanticway.com)
- ✓ Itinerary and trip planning a key focus for consumer and trade engagement



- Based on existing road network
- Environmental audit informed route selection
- Explore the Route – visitors can use an interactive map to outline the full coastal route of the Wild Atlantic Way
- Wild Atlantic Way has a number of distinct zones
  - Northern Headlands, Malin Head to Donegal Town
  - The Surf Coast, Donegal Town to Erris
  - The Bay Coast, Erris to Galway Bay
  - The Cliff Coast, Galway to Ballybunion
  - Southern Peninsulas, Ballybunion to Baltimore.

### NC500, Scotland

#### What it is

- The North Coast 500 is a 516-mile scenic route around the north coast of Scotland, starting and ending at Inverness Castle. It was created by the North Highland Initiative and designed to bring together the best of the north Highlands in one iconic touring route.

#### Key learnings

- ✓ An overarching brand
- ✓ Multi-region, launched to work with all aspects of tourism sector
- ✓ Dedicated consumer/trade website  
<https://www.northcoast500.com>
- ✓ Attracted 29,000 additional visitors and £9m additional spend in its first year
- ✓ A driving route that is also regarded as a challenge for endurance cyclists





## Focus on Scotland: Scotland is a popular destination for German visitors – it is currently the second largest inbound market for Scotland

- Given Scotland's relative proximity to the top of the East of England Touring route (with access through Newcastle airport / port into Scotland) it will be key for the East of England Touring team to differentiate their product.

### Germany was Scotland's 2<sup>nd</sup> biggest share of trips and spending

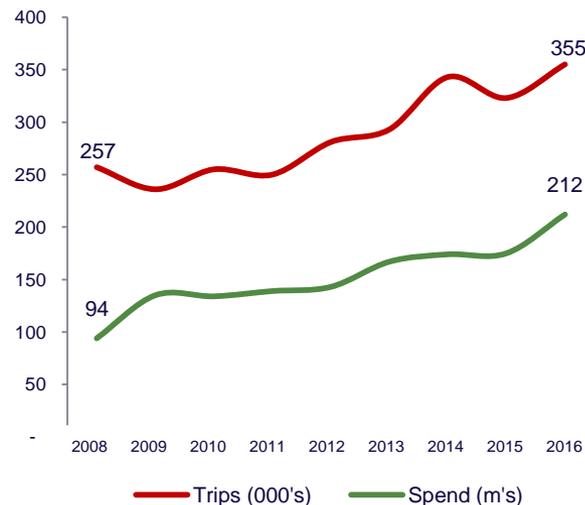
#### Annual trips and spend in Scotland – Top 5 markets

Country (top 5)	2016 Trips	2016 Spend
USA	451,000	£510m
<b>Germany</b>	<b>355,000</b>	<b>£212m</b>
France	152,000	£75m
Canada	149,000	£130m
Australia	132,000	£102m

### Germany are also steadily increasing their trips and spend in Scotland

68% of all trips are for holiday purposes

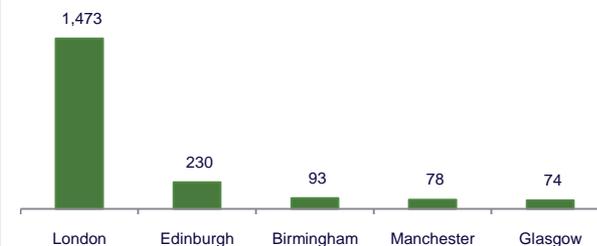
#### Annual trips and spend in Scotland



### Scottish cities show above-average spread across UK's nations and regions

- London is the leading destination for Germans, but Edinburgh is second.

#### Top towns and cities visited 2016 (000's)



## Focus on Scotland: Perceptions of Scotland among German consumers

- A holiday in Scotland is perceived to be one that will be unique, authentic, enriching, mystical and varied – an adventure.
- It is seen to offer the freedom to discover.
- Research conducted in 2015 explored the key benefits of a holiday in Scotland, with the following tangible and more emotional factors standing out for German consumers:

<p><b>Scenery and Landscape</b></p>	<p>The openness, remoteness and ruggedness of Scotland’s vast landscape were perceived by German visitors to be strong benefits of a holiday in this country, in contrast to busy tourist filled beach destinations.</p> <p>Common associations which set Scotland apart from competitors include unspoilt landscape with a touch of mysticism, a mythical place. The richness of Scots history adds to the sense of “mysticism” and legend of the landscapes, in which there is much to be explored.</p>
<p><b>History and Culture</b></p>	<p>Scotland’s history and culture is viewed as a strong motivator to visit by the German market.</p> <p>They expect a richness of history and legend (a history &amp; culture defined by strong and unique Scottish character inspired in part by images of <i>Highlander</i>, <i>Outlander</i> and <i>Braveheart</i>).</p>
<p><b>People</b></p>	<p>They expect to meet people who are proud of their history and do not pretend to be someone they are not. An authentic experience is important.</p> <p>They also expect interactions with friendly and hospitable people in Scotland to enhance their overall holiday experience.</p>
<p><b>Escape</b></p>	<p>The ability to “get away from it all” is seen a strong benefit of a holiday in Scotland. They expect to feel a contrast between Scotland and their everyday lives.</p>

Scotland offers a relatively similar propositions to regional England. Whilst we know what German’s enjoy about their visits to Scotland, we also need to make sure the EETR:

1. Matches the desires and aspirations Germans have come to expect from holidaying in the northern regions and nations
2. Offers them something different / unique to what they might be able to get in Scotland
3. Builds its own brand and identity. Scotland benefits from mystical landscapes and richness of history, culture and legend, EETR should be distinctive and appealing against this.

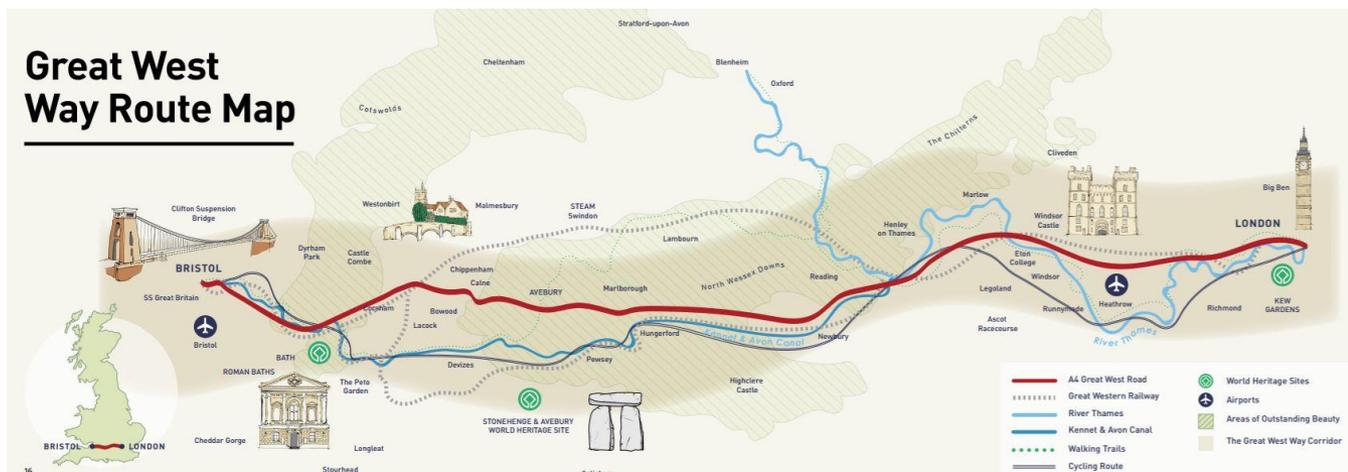
“It’s all about 3 things for me - castles, hills and sea - I want to escape the city and be in the vast, open beautiful landscapes”

“The castles, the wildlife, the lakes, the pubs and the music”

## The EETR team can also take learnings from The Great West Way, another DEF project currently being developed

### Proposition

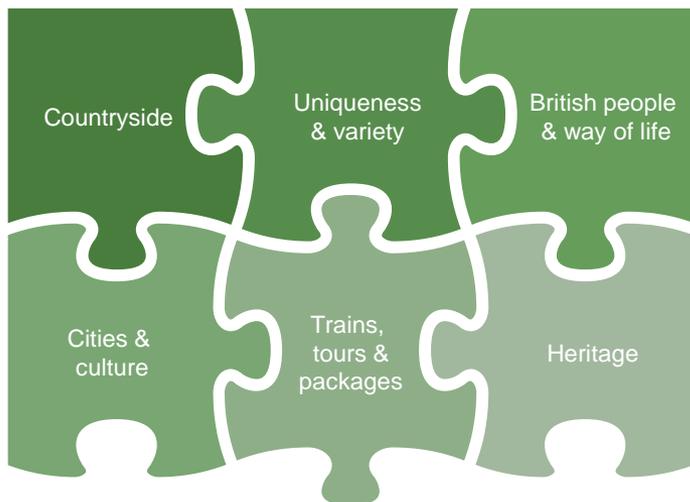
- The Great West Way links London and Bristol. It follows a 125-mile route based on one of the first Great Roads commissioned by the Kings of England.
- Along the Way, everyday England rubs shoulders with world-famous heritage. The Great West Way is for curious travellers searching for the real England.
- Those who want to explore further, delve deeper and uncover the essence of England.
- The Great West Way offers an extraordinary variety of English experiences not found in any other part of the country.
- ‘England Concentrated’ – presenting an extraordinary variety of attractions and experiences in an easily-accessible, compact area.
- The Great West Way project will win new business and market share for England, growing the visitor economy and transforming the visitor experience along and around the route. The Great West Way joins up many of England’s most iconic destinations and attractions along a corridor between London and Bristol.
- Presenting a clear compelling proposition to encourage international visitors to travel west, to stay longer and to delve deeper



**‘England Concentrated’**

# Dominance of London: Triggers to get visitors to travel beyond London tie in well with themes included within the EETR proposition

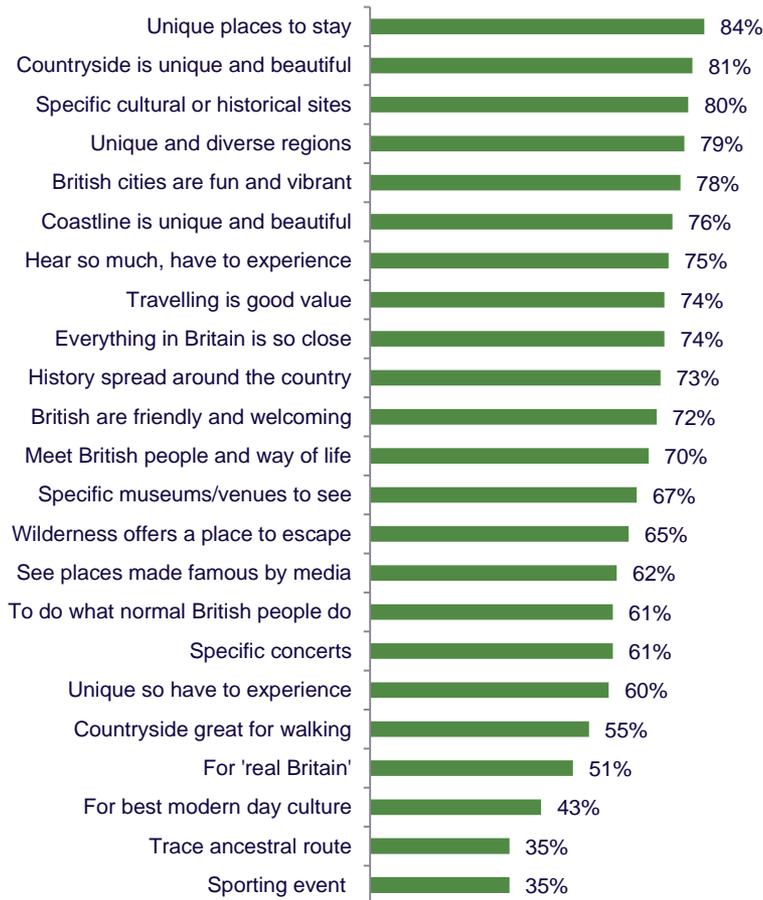
## Triggers to go beyond London



### Implications

- Main reasons to travel beyond London are ones that EETR capture in the itineraries being developed.
- Creating a unifying brand and vision of what the EETR is and stands for will be important for selling the route to visitors and encouraging them away from London (and from Scotland)
- Authenticity and 'real England' are persuasive stories for non-visitors.

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



There are a large amount of European touring routes, both inland and coastal: France is a major competitor, with popularity amongst Germans and a strong heritage of touring routes

- It has an abundance of natural beauty and landscape, plus world-renowned food and drink options

## La Route des Grandes Alpes, France

### What it is

- The route of the High Alps, this drive takes you throughout the mountains of France. Built solely for tourists that wanted to travel a scenic route through the region, the route takes drivers through 4 national parks and 16 mountain passes.

### Key learnings

- ✓ Covers themes of nature, landscapes, scenery, culture, food and drink
- ✓ Each smaller route based around 1 or 2 core themes
- ✓ Driving route and cycling route.
- ✓ Covers sections of the Tour de France



## Selection of Other Routes in France

Including, but not limited to:

- Route Napoleon
- Cote d'Azur – 3 x Corniche routes
- Calais to Provence
- Brittany to SW France
- Normandy to the Languedoc
- Troyes to Saint-Etienne via Dijon
- Col de la Bonnette
- Alsace wine route
- Provence's lavender fields
- Biarritz to Bourdeaux



There are a large amount of European touring routes, both inland and coastal: Germans have a wide variety of routes on their doorstep, being an important domestic holiday option

## Black Forest High Road, Germany

### What it is

- The Bundesstraße 500 is a German highway. Intended mainly as a tourist road, it traverses the heights of the Black Forest in a north-south direction. It runs over 60 km from Freudenstadt to Baden-Baden. Celebrated its 75th birthday in 2007.

### Key learnings

- ✓ Tourism at the centre of its construction
- ✓ Themes include forests, valleys, mountains, landscape.
- ✓ Can also be used as access route for skiing



## Selection of Other Routes

Including, but not limited to:

- **Germany** – Romance Road, Wine Route, Castle Route, Fairy Tale Route, Schwarzwaldhochstrasse, Alpine Road, Mosel Valley
- **Italy** – Amalfi Coast, Great Dolomite Road, Stelvio Pass.
- **Switzerland** – Klausen Pass, Furka Pass.
- **Romania** – Transfăgărășan
- **Ireland** – Ring of Kerry.
- **Northern Ireland** – Causeway Coastal Route.
- **Portugal** – Estoril Coast Drive.
- **Norway** – Trollstigen, Atlantic Road.



## Key take outs from the established routes

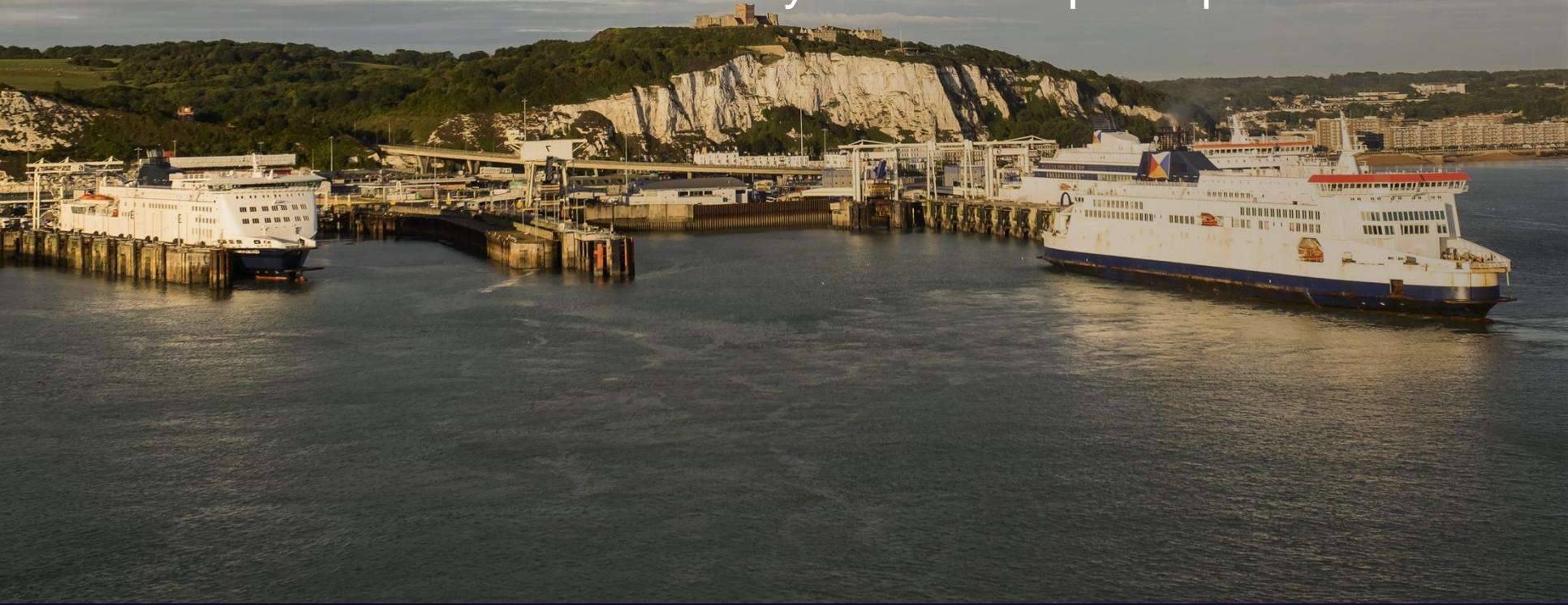
- **Overarching brand**
  - The most successful routes are a brand in their own right - EETR needs to be distinctive and appealing against these brands.
- **Differentiating experiences**
  - A route that has different experiences along the way is likely to have the widest appeal. It is also most likely to keep people coming back so they can experience new sights or activities from their previous trip.
- **Flexible, tailored routes**
  - The Wild Atlantic Way is a great example here. While overall the route spans 1553 miles, it has been segmented so visitors can choose certain sections for their trip, with the ability to follow a set itinerary or DIY
- **Competing against domestic routes in the UK**
  - We need to match German expectations from a holiday in the northern regions/nations, whilst offering them something different to what they might be able to get in Scotland or Ireland (and even Southern England routes)
- **Scenery and nature, culture, food and drink are common across most touring routes**
  - These should form the base of the EETR, with our unique destinations and activities differentiating from the established routes
- **Overarching themes**
  - Most routes have an overarching theme, something to pique interest amongst potential visitors (such as the Tour de France, Romance Road)
- **Touring routes that can be used for secondary purposes**
  - This would be an added benefit for enticing secondary markets (e.g. short walks, cycling for other routes)



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Insight

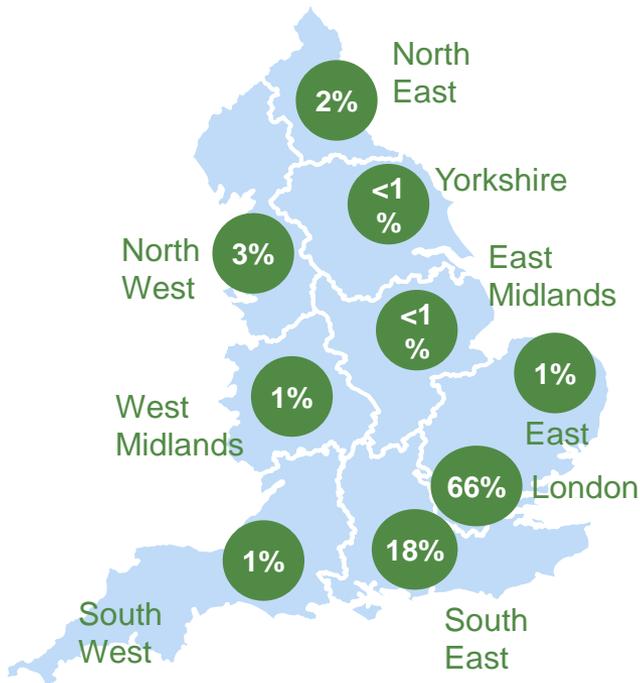
# How to optimise the EETR experience Gateways and transport options



## 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
- Air travel is the main mode of entry for Germans but seaports are a popular way of getting to the UK.

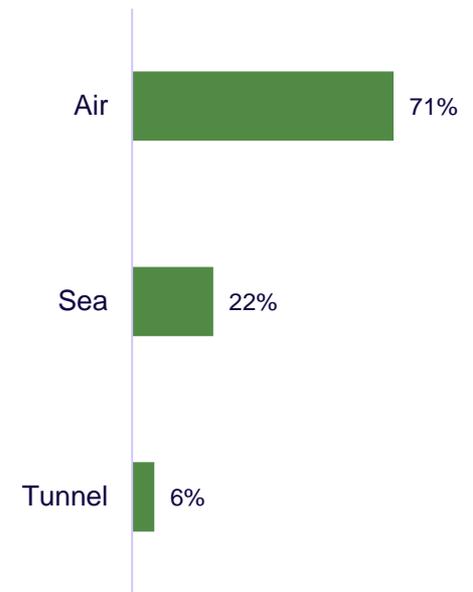
**Gateways: Region of Entry (UK Holiday Visitors)**



**Mode of Entry (UK Holiday Visitors)**



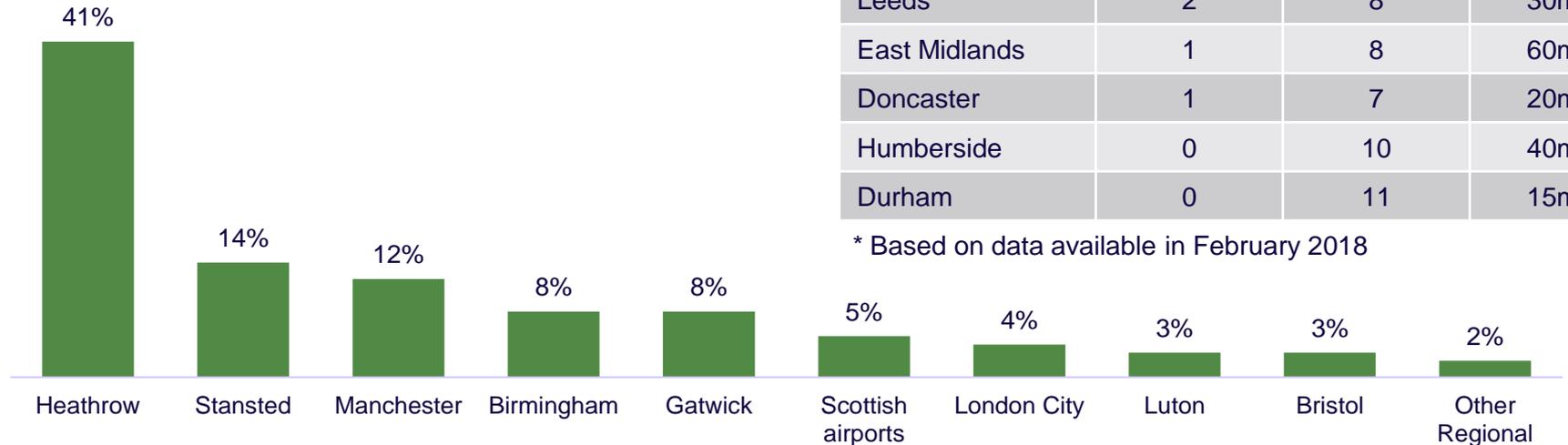
**Mode of Entry - All UK visitors from Germany**



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

- Outside of Heathrow and Stansted, Manchester and Birmingham have the next highest seat capacities. They also have the next highest number of direct flights.
- The other regional airports in close proximity to the A1 have relatively low annual seat capacity, reflected in their lack of direct flights.
- The smaller regional airports are also somewhat limited from which cities inbound travellers can travel from, although utilising indirect flights can alleviate this.

### Annual Seat Capacity from Germany



A direct flight takes c.1-2hrs, indirect flights take c.3-6hrs

Airport	# direct flight routes*	# indirect flight routes	Time to drive to A1
Stansted	14	3	45min
<b>Manchester</b>	<b>10</b>	<b>7</b>	<b>70min</b>
Heathrow	8	8	45min
<b>Birmingham</b>	<b>7</b>	<b>8</b>	<b>60min</b>
Luton	4	12	25min
Newcastle	2	12	10min
Leeds	2	8	30min
East Midlands	1	8	60min
Doncaster	1	7	20min
Humberside	0	10	40min
Durham	0	11	15min

\* Based on data available in February 2018

## With that said, there are 11 airports on or near the A1, 8 of which are outside the South

- Despite their lowered capacity, these 8 airports provide a good route into the EETR that doesn't involve stopping in London. It is important to help visitors travel on from their point of entry, wherever it is.

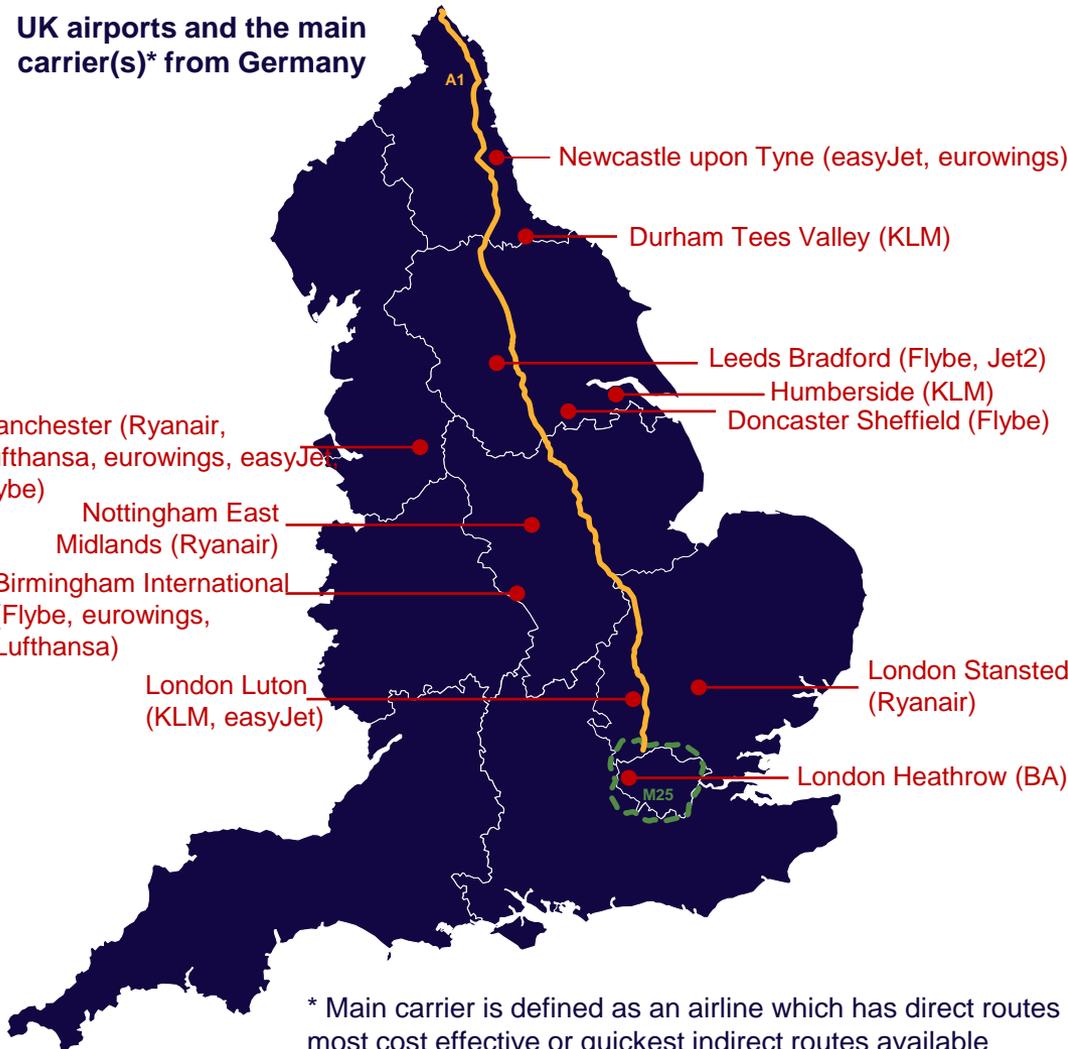


- EETR can benefit from current trends – Germans are already visiting Birmingham and Manchester in higher numbers and these airports have the greater seat capacities and better flight options.
- It will be down to positioning and perceived ease of access that moves visitors away from these regional hubs and onto the EETR.
- Visitors taking part in a touring holiday are prepared to travel, so these airports shouldn't be a major problem in terms of their distance to the A1.

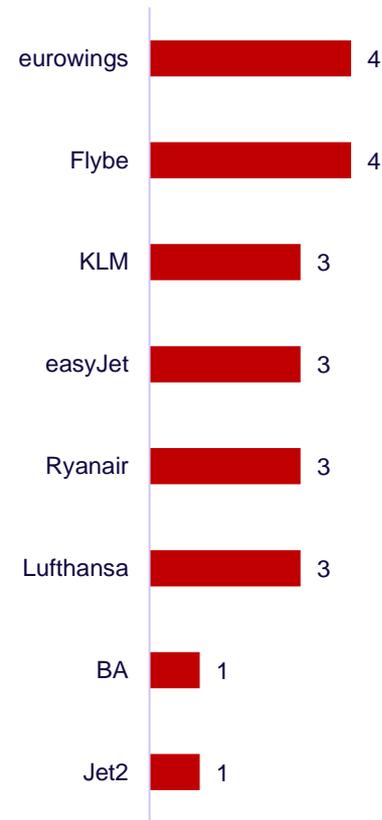
# Open Jaw flights is another option that could be considered. Eurowings, Flybe, easyJet and to an extent, Ryanair, would provide a broad coverage across the A1

- This is possible through one carrier or multiple carriers. We would recommend investigating potential partnerships with the main carriers\* listed below, as they are likely to provide the quickest and most cost-effective tickets.

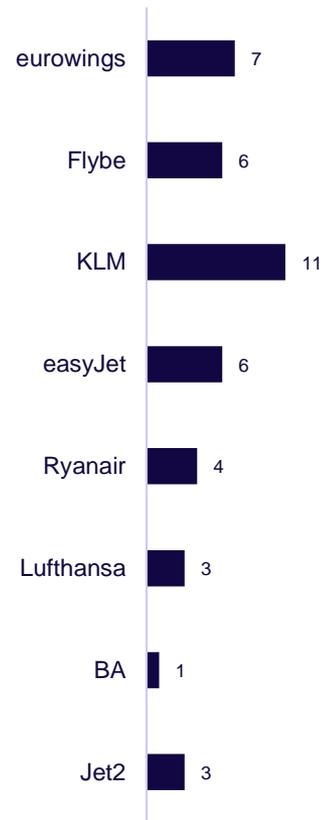
UK airports and the main carrier(s)\* from Germany



Number of UK airports where airline is the main carrier\* from Germany

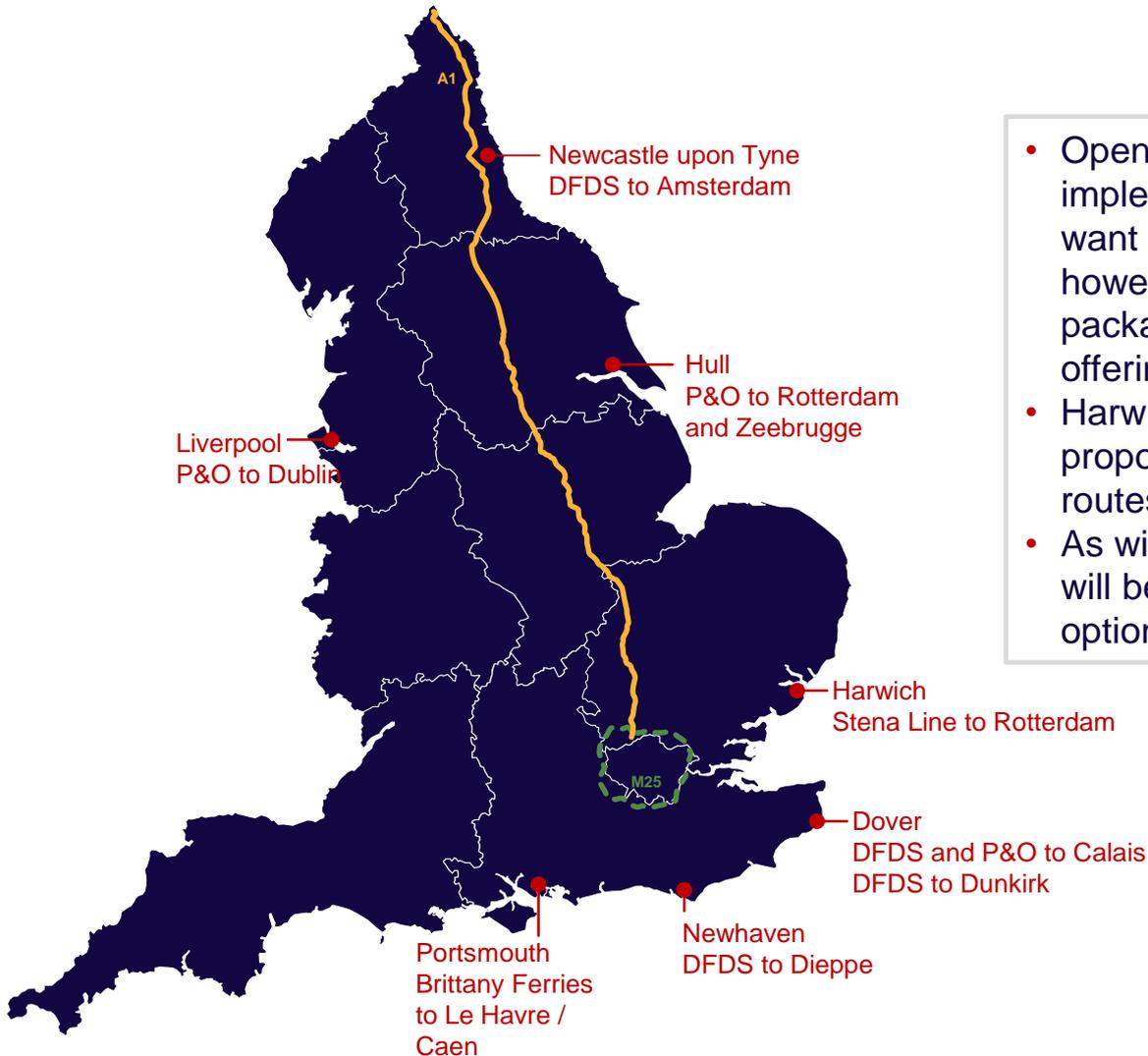


Total number of UK airports carrier flies to from Germany



\* Main carrier is defined as an airline which has direct routes to/from an airport, or if no direct route exists, has the most cost effective or quickest indirect routes available

## Ferries could join the EETR with mainland Europe and self-drivers – with routes in from Holland, Brussels and France

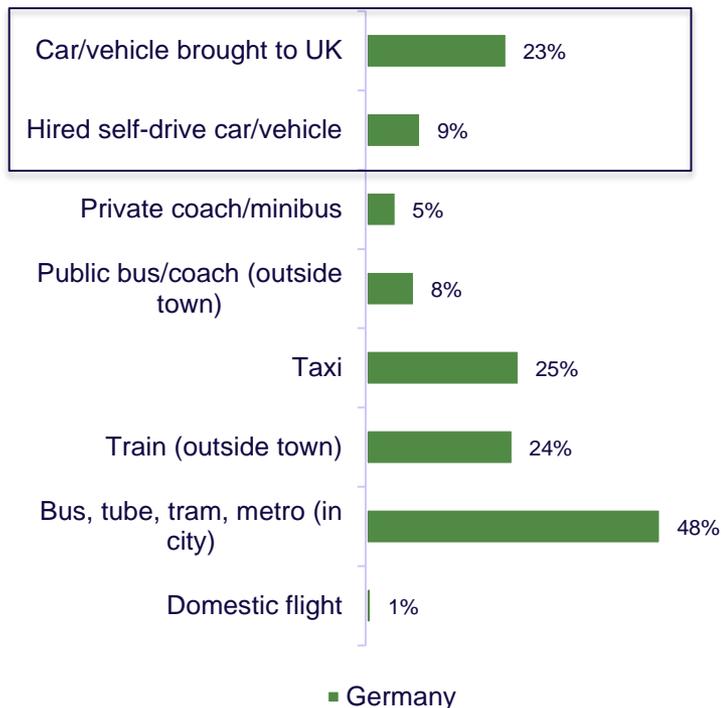


- Open Jaw tickets might be harder to implement for ferries (especially if you want to avoid London and the South); however, it would still be possible to package two single tickets into one offering.
- Harwich and Hull could be a potential proposition utilising P&O and Stena Line routes
- As with all transport options, the key here will be ensuring Germans perceive the option to be hassle free and easy to do.

## Use and consideration of personal and public transport is relatively high for Germans – but consideration does not always translate to usage

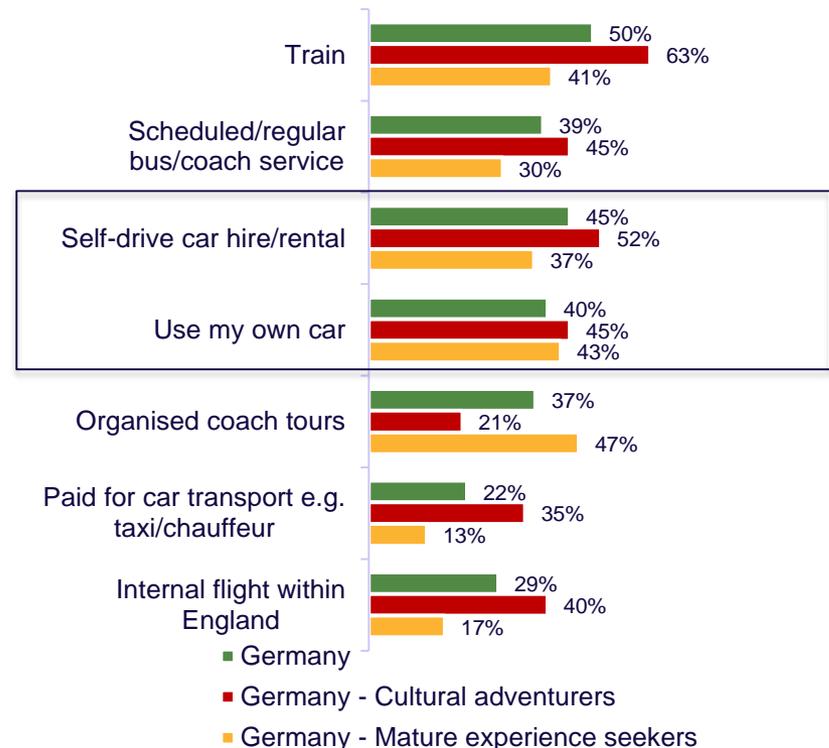
- While there is high consideration for car hire it does not always translate into actual usage – for example 45% of Germans would consider hiring a car but only 9% did. This may suggest that visitors do not find it easy to book car hire but further exploration is required to validate this.

Modes of Internal Travel in UK (all visitors)



Segment data not available

Types of transport considered



## Stopping at many of the places in the example itineraries, England's extensive rail network and the BritRail Pass could also provide access to the EETR

- Some consideration will need to be given to the positioning of public transport options, as it is expected the key audience will be those who naturally lean towards self-driving.
- Providing clarity on journey planning around regional England will also be important.

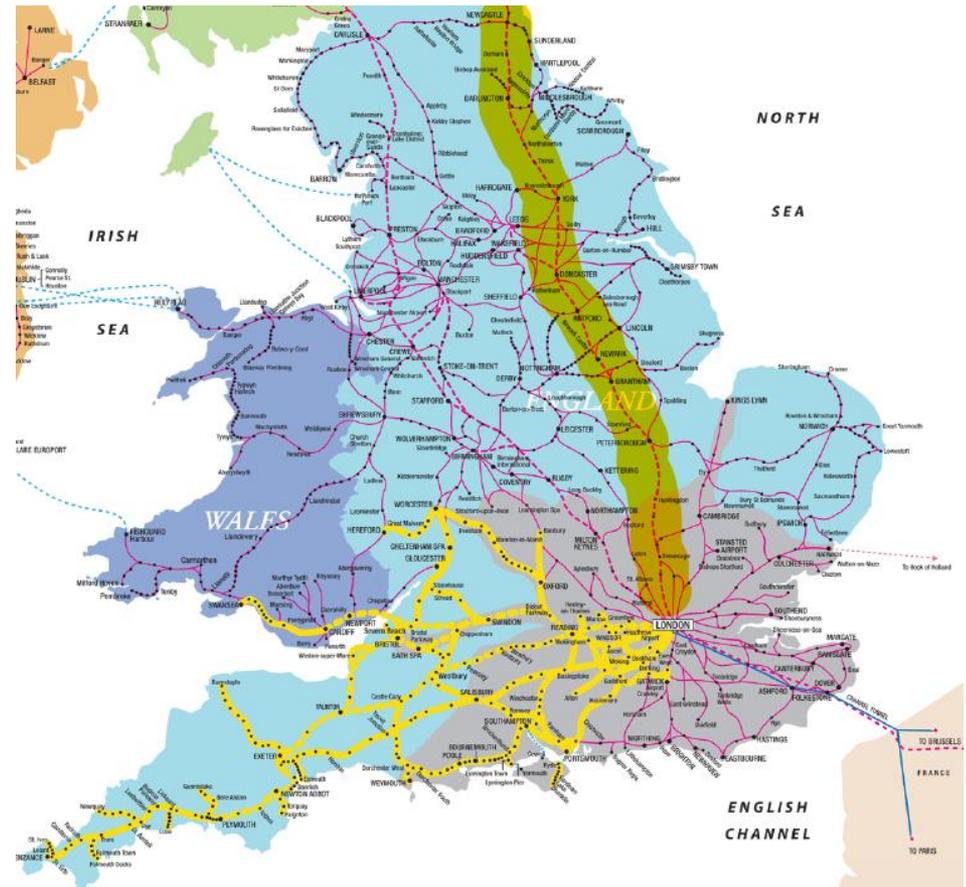


**BritRail Pass**  
Make the most of your visit to Great Britain with this pass which provides access to all trains on Great Britain's National Rail Network.

---



**BritRail England Pass**  
If your focus falls on England, home to nine distinct regions including London, this pass will make it possible to include all the major attractions and cities on your itinerary.





VisitEngland

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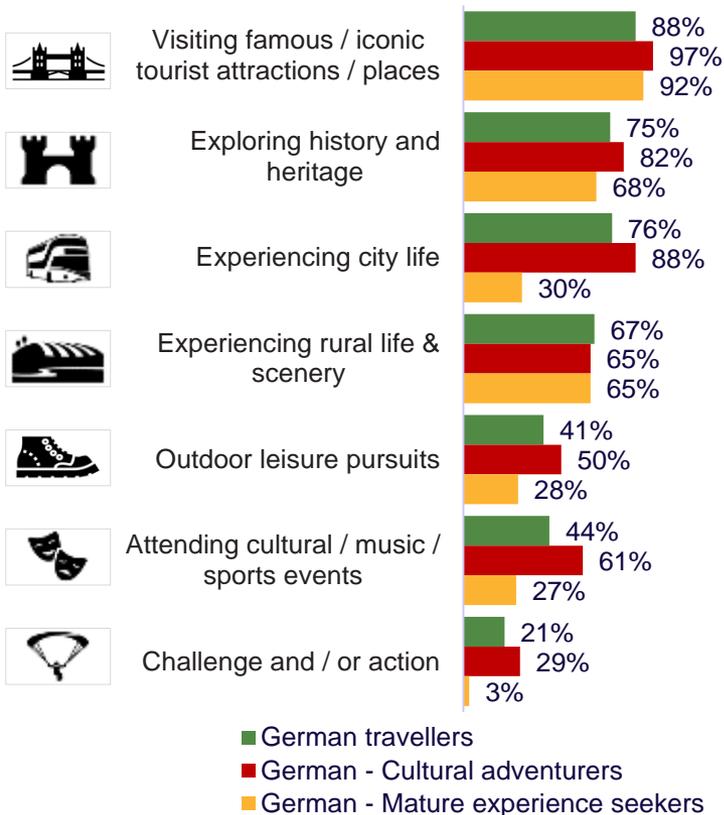
Insight

The background of the slide is a collage of three images. On the left, a blurred crowd of people at an outdoor festival. In the center, a narrowboat on a canal with a large metal structure above it. On the right, a view of a large castle with a flag on top, surrounded by green trees.

# How to optimise the EETR experience Building an appealing touring product

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

- Famous tourist attractions, exploring history & heritage and experiencing rural life & scenery have the widest appeal across the segments, and are likely to be important focal points for both pre-set and individualised itineraries.
- Beyond this, Cultural Adventurers are much more likely to find city life, outdoor pursuits and cultural / music / sports events more appealing.
- The experiences we know Germans like from visiting Scotland are: history, culture and legend, unique, authentic, enriching, mystical, varied – which is similar to their considered activities for visiting England
- Visitors from Germany are most likely to want to experience ‘real’ life, both rural and in cities.



Those with most interest in the theme *
All
All
Cultural adventurers
All
Cultural adventurers
Cultural adventurers
Cultural adventurers

\* Cultural adventurers are generally more open to considering activities

## History, heritage, nature and food & drink activities likely to be on German 'to do lists' when taking a holiday in England

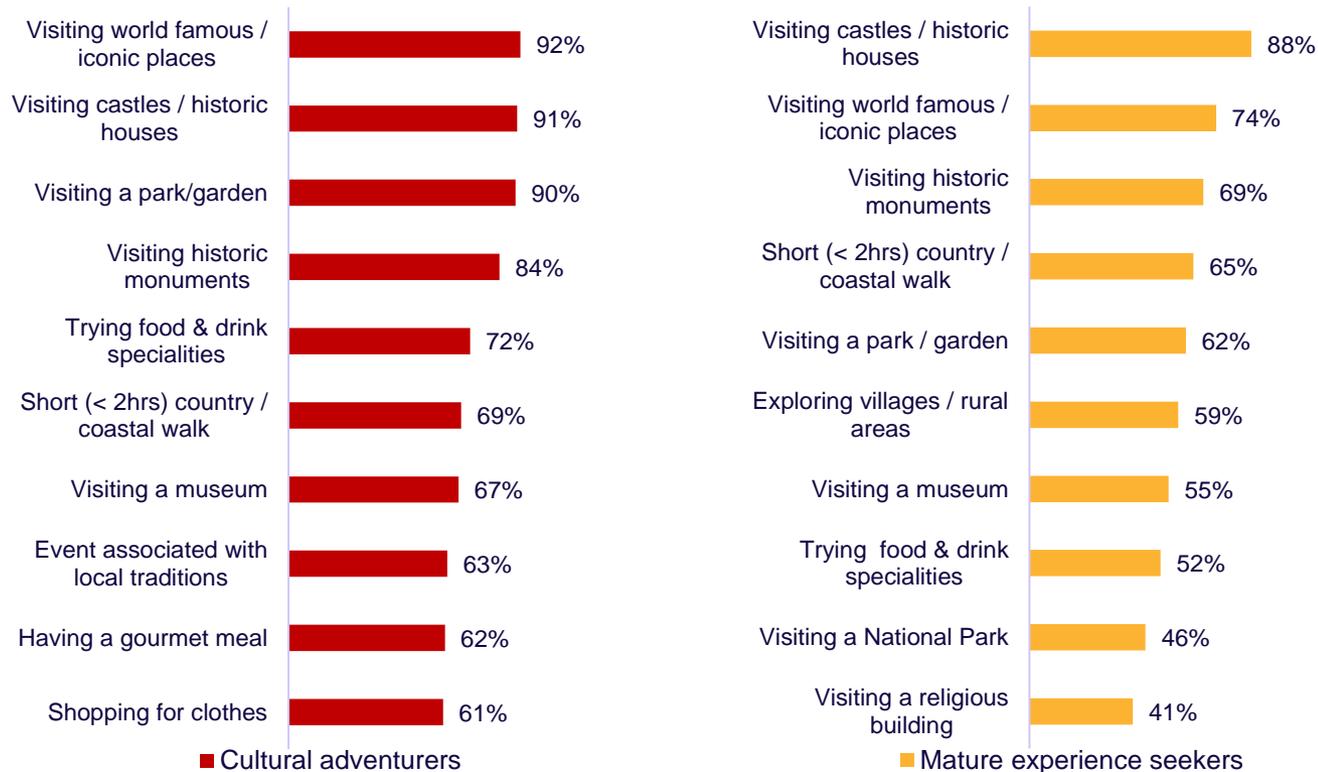
### Top 10 activities considered in England – Germany total



## There are subtle differences between the target segments which should be taken into consideration when planning itineraries

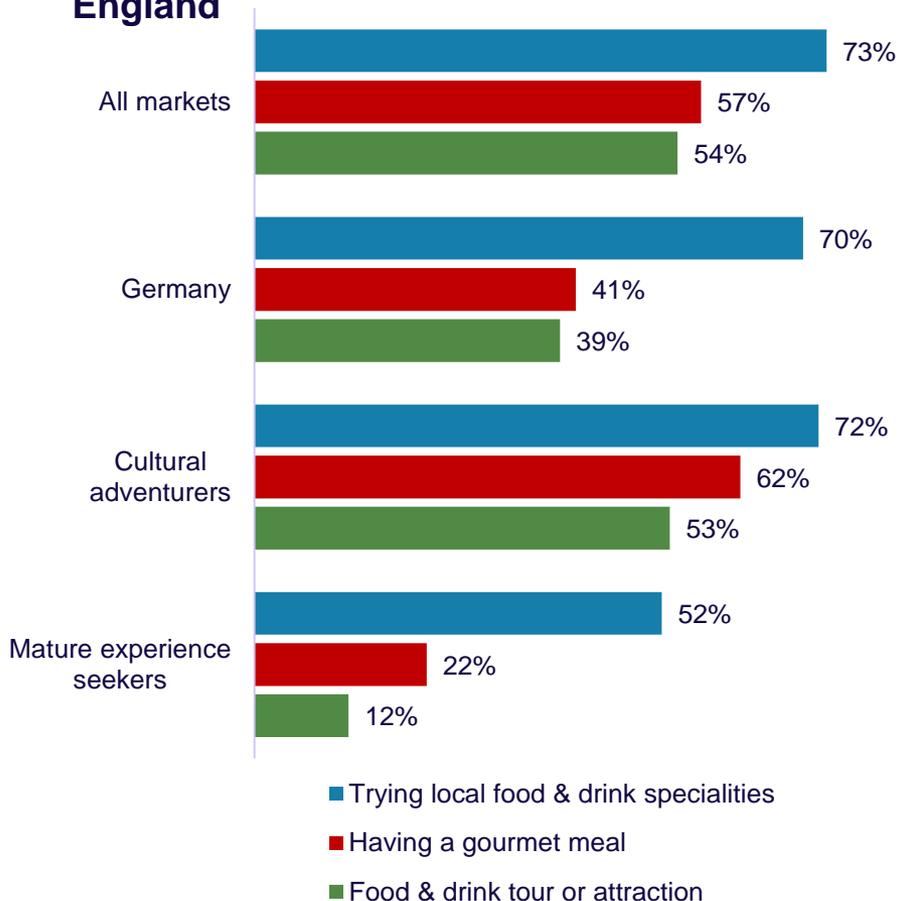
- Cultural adventurers are more likely to want to try gourmet meals and shop for clothes
- Mature experience seekers are more likely to prefer national parks, religious buildings and exploring villages (or market towns)

### Top 10 activities considered in England by German consumers – by Segments



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

### Food related activities considered for a holiday in England

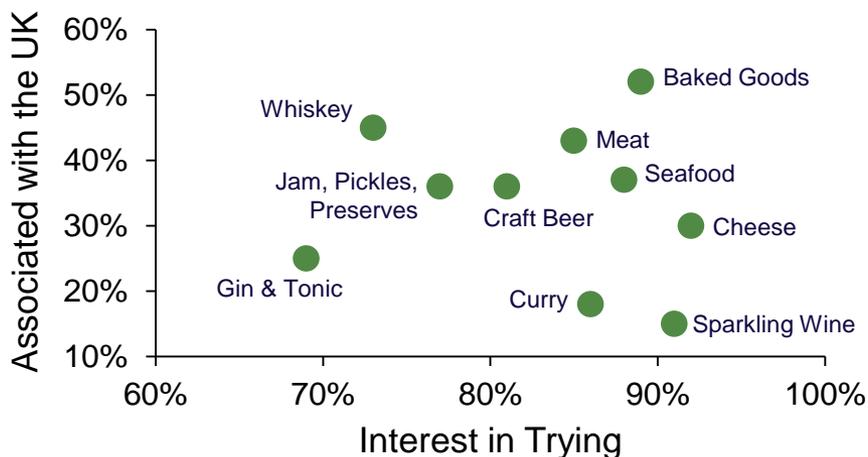


- Germans overall and both segments show a higher consideration for trying local specialities.
- Cultural adventurers are the driving force behind food & drink activities – they are more likely to want to try local specialities, have a gourmet meal and go on a tour vs mature experience seekers.
- Mature experience seekers are slightly more likely to consider having a gourmet meal versus going on a food or drink tour.

## There is high interest in trying a number of local food & drink specialities – visiting the pub appeals to Germans

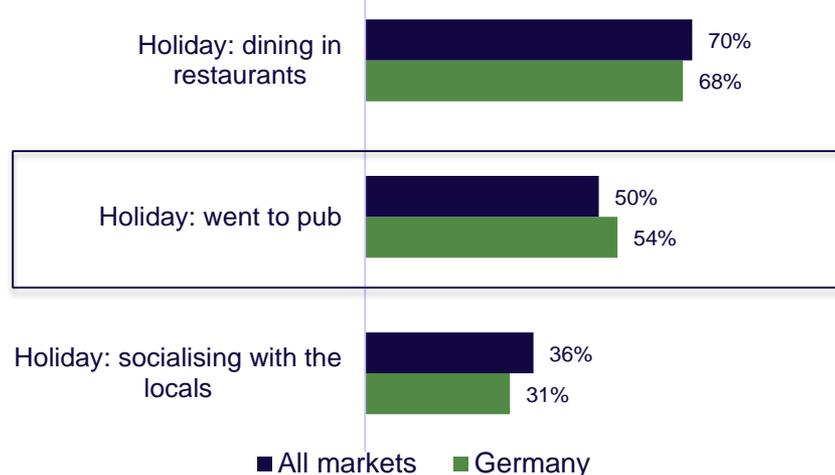
- In some cases, for example, curry, sparkling wine and gin, there is relatively low association with the UK providing these.
- This relatively low association could be used in messaging to promote the uniqueness of the experience.

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



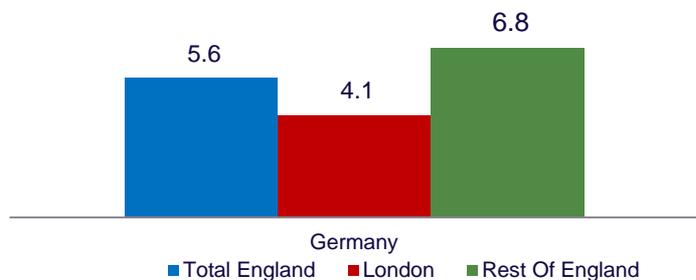
- Germans score similarly high to the 'all market total' for having restaurant experiences while on holiday.
- The inclusion of pubs in the offering is also appealing to Germans.

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



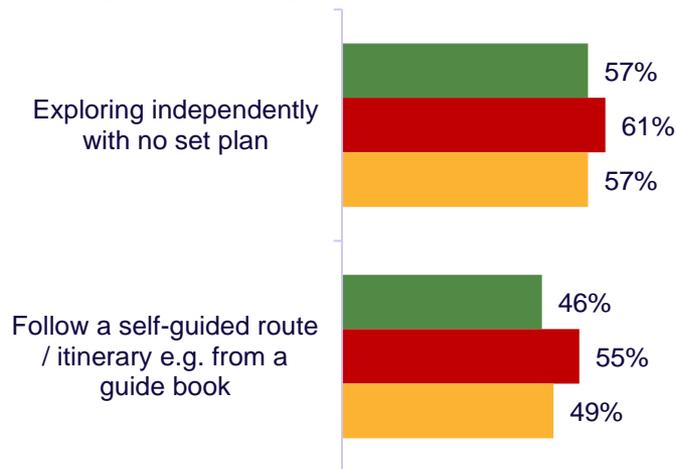
On average, visitors from Germany stay 4-7 days in regional England, suggesting the itineraries created are a good length

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



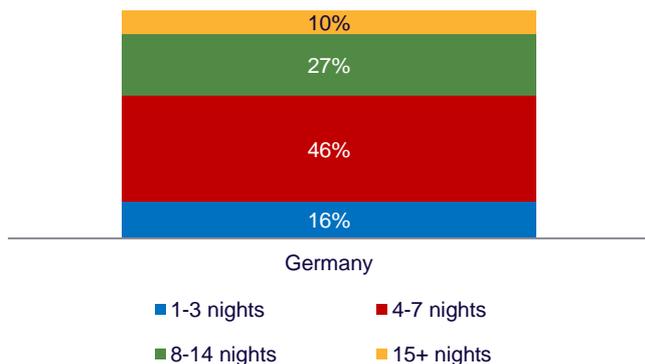
- Over half of Germans have explored independently with no set plan
- Cultural adventurers are more likely to have followed a self-guided route than the average German traveller

**Exploring / seeing sights on holiday:  
Always / Frequently do**



■ Germany ■ Cultural adventurers ■ Mature experience seekers

**Duration of stay in England (2015)**



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

Source: DEF Themes and Activities Research 2017



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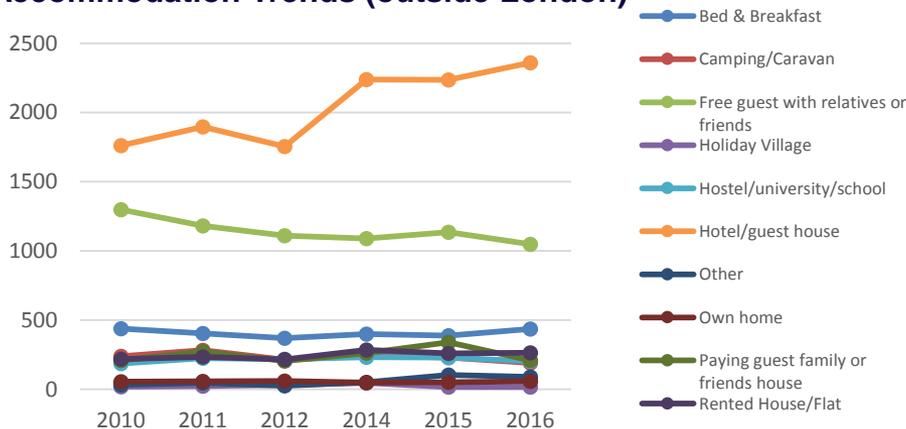
HOTEL ENTRANCE

# How to optimise the EETR experience Accommodation



## Among all holiday visitors, accommodation is currently dominated in volume terms by mainstream hotels or guest houses

### Accommodation Trends (outside London)



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

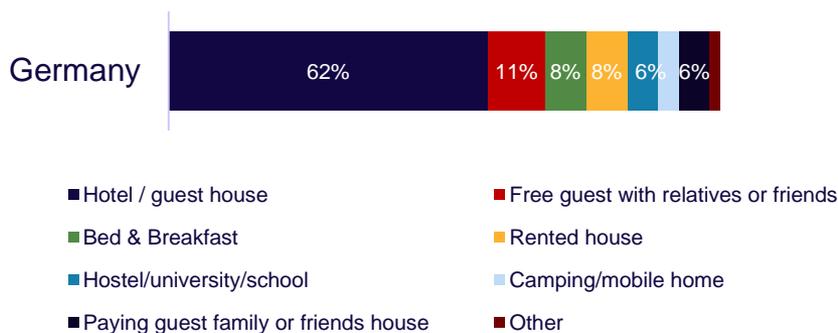
### Booking channel

- Over half of Germans 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

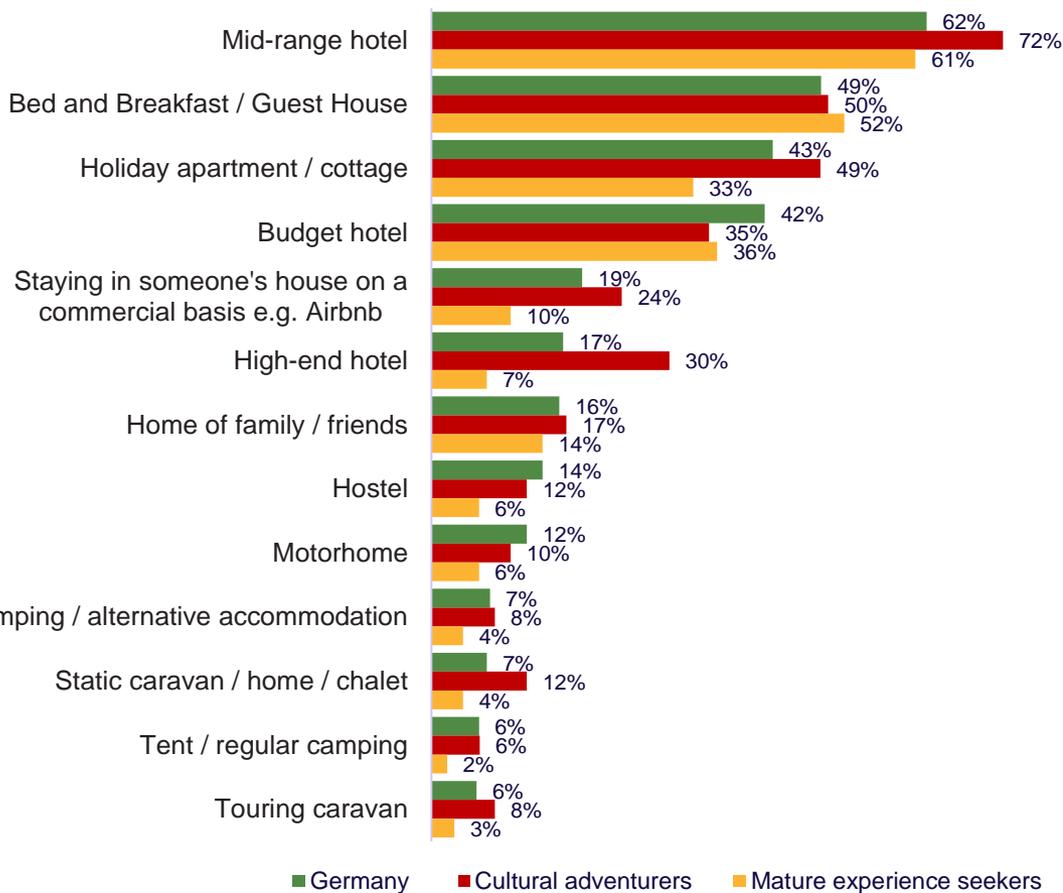
- Visibility online is key to the success of accommodation providers, for awareness, consideration and booking.
- This is both through their own online channels and through OTAs, DMOs, review sites etc.
- This is important for both large hotels and smaller independents/alternative accommodation types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

### Accommodation Type – All UK



# The types of accommodation considered illustrates the potential for a range of diverse options

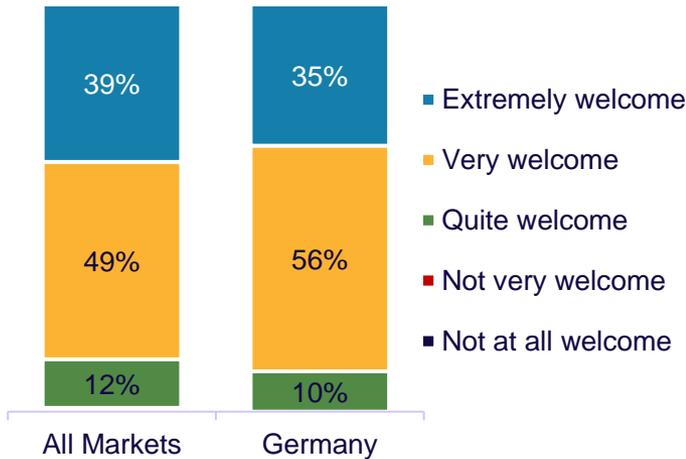
Types of accommodation considered as part of a holiday to England



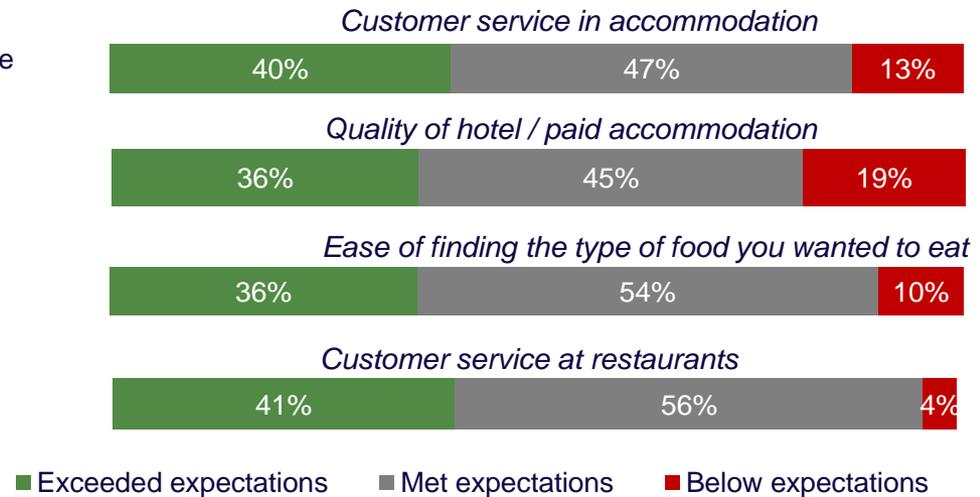
- Hotels are overall the most considered accommodation option at a total level.
  - Mid-range hotels are most popular but there is still a significant minority interested in high end (especially cultural adventurers) and/or budget hotels.
- Germans are also interested in options that lend themselves to “quintessential England”, such as B&Bs, guest houses, cottages and Airbnb. Cottages and Airbnb are of particular interest to cultural adventurers.
- 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.

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 – German visitors



- 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’.
- There is a feeling amongst some that accommodation options could be of a better quality.



# How to optimise the EETR experience **Using Technology**



# Social media is now part of everyday life and there is clear opportunity to engage with travellers through social media whilst they are on holiday

- 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.

- Just over half of Germans use social media while on holiday.
- 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.

## Social Media Usage

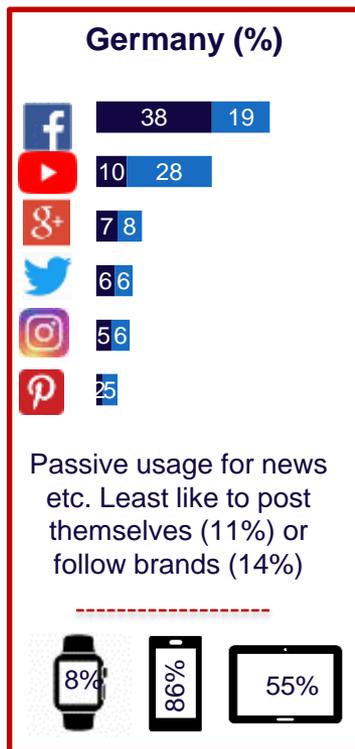
■ Daily ■ Weekly

Facebook and YouTube dominate.

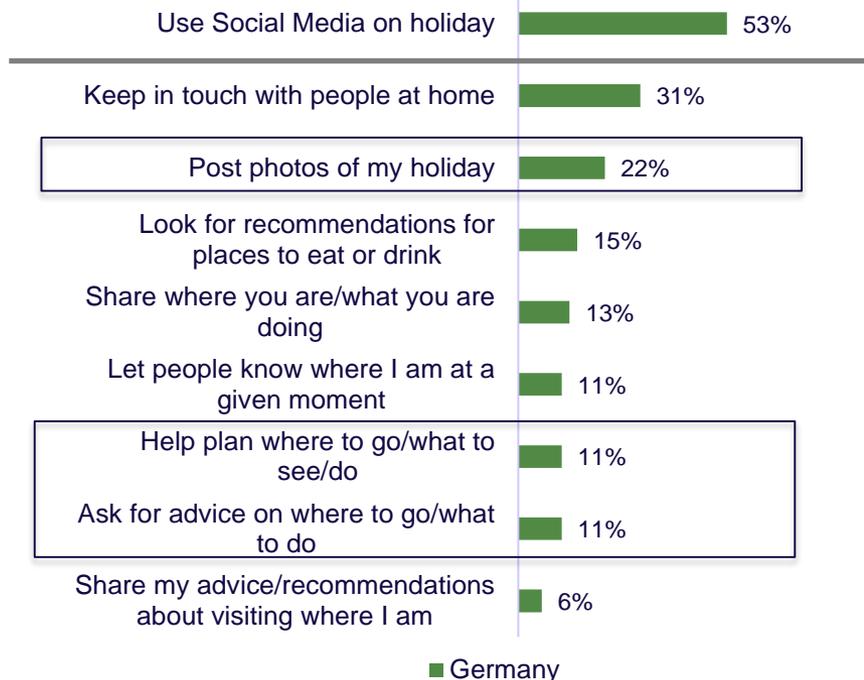
Women and younger people are typically the most involved in social media.

## Tech ownership

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



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



## Both the Wild Atlantic Way and NC500 make use of their overarching brand, providing websites that cover a variety of needs for the entire route

- The Wild Atlantic Way website has a wealth of information but requires users to have an idea of where they would like to go and for users to ‘dig’ around a little more
- NC500 is slightly less detailed, but has themed suggestions and recommendations for ease of wayfinding



Interactive map / trip planner	✓	✓
Itineraries	Numerous, detailed itineraries by region	9 x themed trips incl 7 day, active adventurer, motoring. More with membership
What to see	Signposted: sightseeing, attractions, activities	Signposted: adventure & attractions, culture, history & heritage
Accommodation	✓	✓
Food and drink	✓	✓
Blog	✓	✓
Shop	✗	✓
Getting around / travel help	✓	✗
App	✗	✓

What works well on these websites? Itinerary planning is key, usability and the user experience needs to be at the core of website design



## WILD ATLANTIC WAY

- Allows you to ‘pin’ activities and stops that might be of interest, creating your own itinerary on the ‘trip planner’ page
- Lots of suggested routes and itineraries, of varying lengths
- Allows you to download these itineraries, for use offline
- Provides journey details (eg distance, time, recommended form of transportation)
- Provides details for all forms of transportation, and not just self-driving – although this information can sometimes be difficult to find



- Generally less intimidating to use, simple and themed options
- Easier wayfinding
- Themed itineraries – for example, if you know you would like an active holiday, click on ‘active adventurer’
- ‘What to see’ is themed as well – saves you knowing exactly what you would like to see in each region
- However, it makes you pay to see the full itineraries which will likely put visitors off the website
- Has a merchandise shop
- Has an app, which works offline if you lose signal on the route



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How to optimise the  
EETR experience

**The Purchase Journey**



# The planning stages: There are four stages to the planning process; 3 in 5 of visitors from Germany start to think about their trip more than 6 months in advance

## The planning process – German market:

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



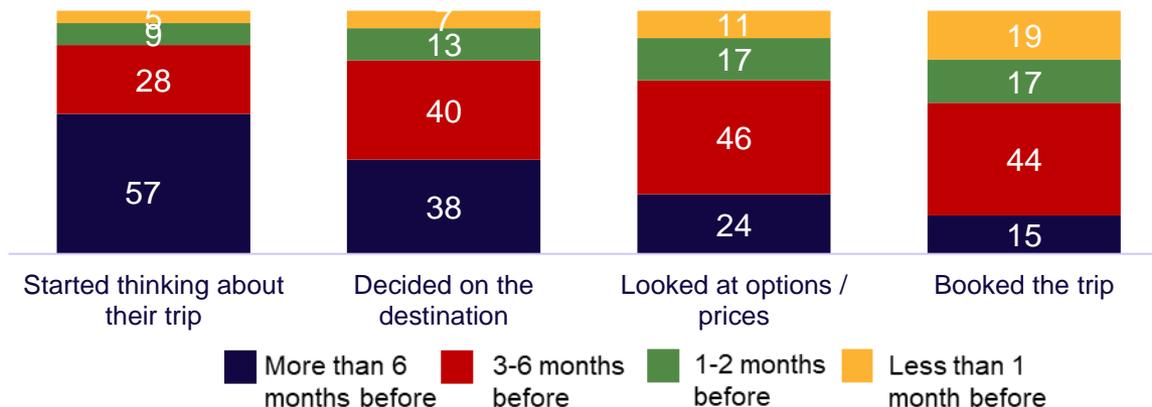
For stage 1-3 it could be either a solo or joint effort, when it comes to making the booking however, this is typically done by 1 person

■ Me ■ Both Involved

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

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

Just over half of visitors from Germany start to think about their trip more than 6 months in advance, with most deciding on the destination 3 or more months in advance. Timing of marketing campaigns will need to reflect this.

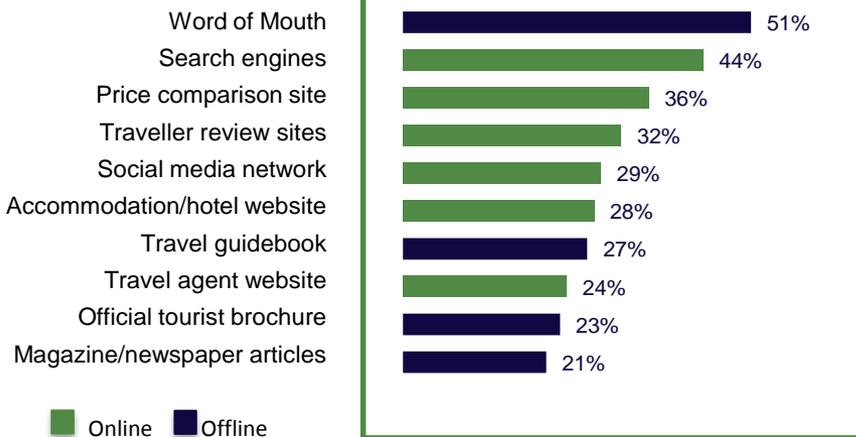


## Online and offline sources both play a role influencing choice of Britain as a destination

- While ‘word of mouth’ is a big influence on destination of choice, Germans are likely to use travel guidebooks and official tourist brochures more-so than other markets
- OTA’s play a significant role in enabling travellers to be confident with the price they are paying – and support the research process.

### Top Sources of Influence on destination

#### Sources of Influence



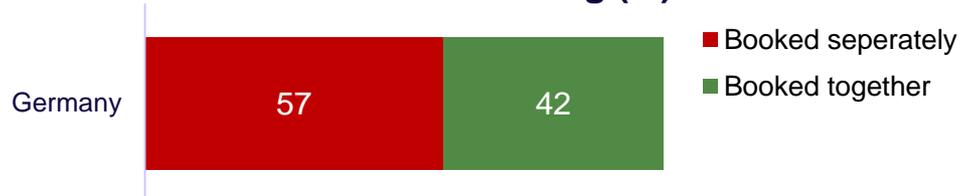
### % who would do this before booking a holiday to Britain



## Booking is an online dominated process

- Online dominates independent bookings, smartphone bookings are a small proportion of bookings (highest for accommodation).

### Travel & Accommodation Booking (%)



### Transport



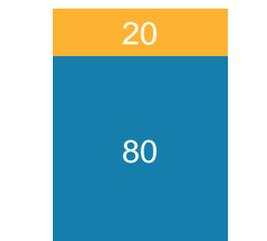
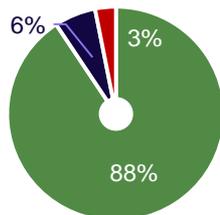
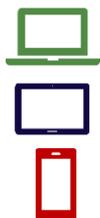
### Accommodation



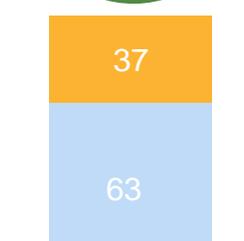
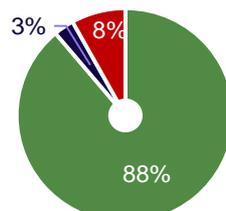
### Package (Travel & Accommodation)



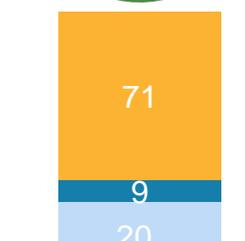
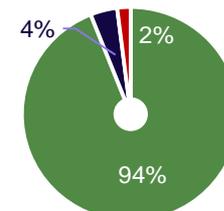
% Booked Online



Germany



Germany



Germany

Direct with travel / transport provider

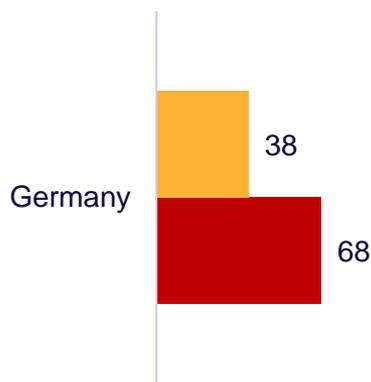
Direct with accommodation provider

Through a travel agent / tour operator / comparison website

Germans are much more likely to plan their holiday carefully before they leave, with activity / experience booking much more likely to be done during their trip

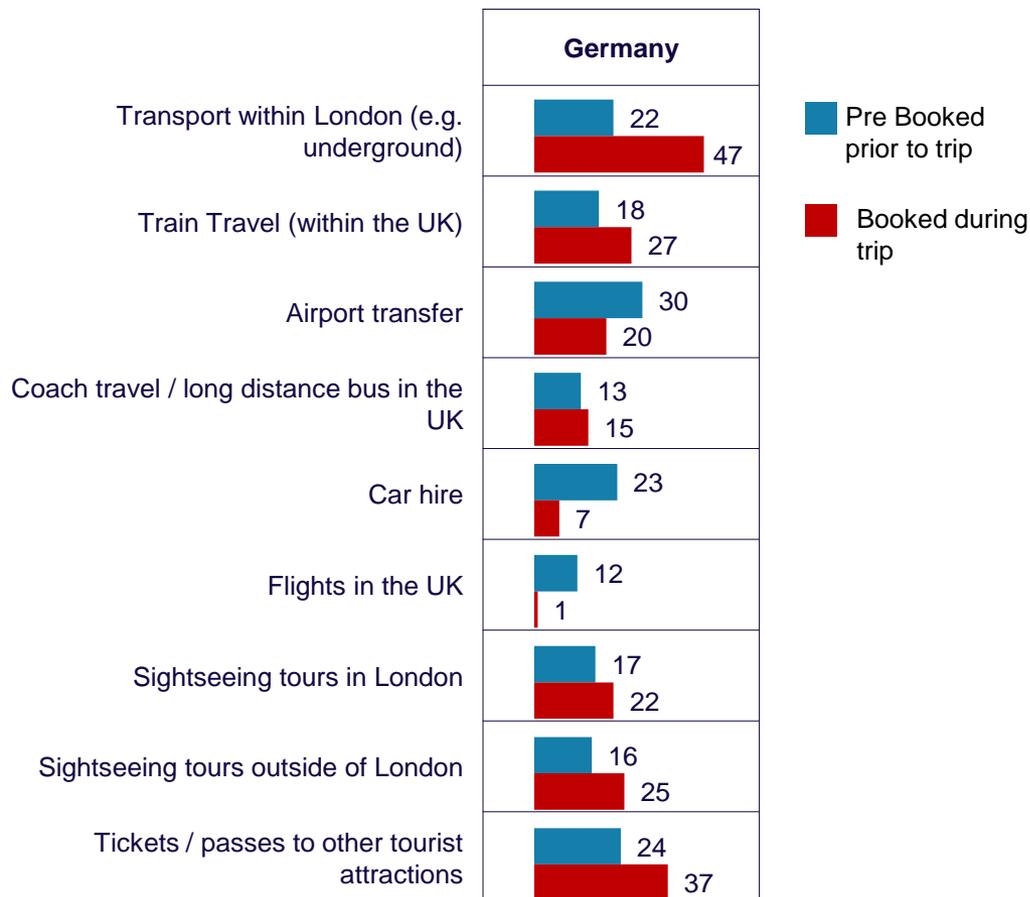
### Itinerary planning vs. spontaneity

- Germans are much more likely to say they would prefer to plan their holiday carefully before leaving although 2 in 5 do like to leave some elements to spontaneity.



- 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



# Travel Media Consumption

- Traditional media, especially newspapers has a high readership in Germany vs other countries.
- Travel blogs are less popular when compared to other European countries, with a limited number of local language blogs available



- **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)



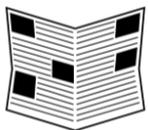
- **Travel blogs**

- 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.



- **Newspapers**

- 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



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Insight

# How to optimise the EETR 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. Combined with heritage/history this could include villages, gardens etc.
- The chance to experience local culture & lifestyle.
- Scenery & countryside.
- Interest in rural England and the English way of life
- 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 – 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).
  - 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)
- 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 transport is required with clear signage.

## 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&B's, cottages.
- Ideally more language capabilities
- Focus on off-peak, whilst Peak capacity remains an issue.

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

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

These concerns span all forms of transport.

- **Lack of regional flights**
- **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.



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# Summary – key take-outs

# How can East of England Touring Team optimise the proposition?

## 1. Domestic and International competition

- There is a lot of competition from well established touring routes.
- The EETR team can take learnings from these - An **overarching brand and vision** are key, as are **themes, differentiated experiences**, and **flexible routes** that can be **tailored to user preference**.
- If **routes have a secondary purpose** (such as opportunities for sports or outdoor activities), this can also be of benefit.

## 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.
- Newcastle, Manchester and Birmingham look to be suitable regional gateways. However, **multiple entry points need to be highlighted in communication** given airport capacity and limited scheduled flights from cities in Germany to regional airports.
- **Use and consideration of personal and public transport is relatively high** – but consideration does not necessarily translate to usage. Further investigation is required as to the ease and barriers of car hire for German visitors.

## 3. Building an appealing touring product

- Germans are likely to want to focus their holiday on **history, heritage, nature** and **food & drink** activities – it is important the EETR and suggested itineraries include a good mix of these.
- Although there is a fair amount of crossover between the segments in terms of considered activities, there are some which could be divisive. The **recommended itineraries should either have 1 segment in mind** (and to clearly communicate this), or to **only cover activities that both segments would be happy doing**.

## How can East of England Touring Team optimise the proposition?

### 4. Accommodation

- The types of accommodation considered illustrates the **potential for a range of diverse options** (from high end hotels to budget hotels, to B&Bs, cottages and Airbnb options).
- **High-end hotels, cottages and Airbnb's** are of particular interest to cultural adventurers.
- It will be important to choose the right accommodation providers to partner with – **those who can offer quality at a good value**
- **Communicate to accommodation and experience providers the expectations of the German market** i.e. no carpet in the bathroom.

### 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 proposition** – this should be carefully considered. A website would be required and if mobile optimised, would be a suitable workaround for not having an app. **This is another area where we can take great learnings from the other established routes.**

### 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.**
- 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.**



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## Appendix

- Other useful case studies
- Detailed segment profiles
- Data sources

## Case study from further afield: Margaret River is an exceptional example of a region which has developed its food & drink experiences into a major visitor proposition

### Margaret River, Australia

#### What it is

The Margaret River is a small town south of Perth in western Australia, known for its craft breweries, boutiques and surrounding wineries. Beaches and surf breaks line the nearby coast, whose waters host migratory whales (Jun–Nov). Stretching between 2 lighthouses north and south of the town, the long-distance walk, the Cape to Cape Track, fringes the limestone caves and sea cliffs of Leeuwin-Naturaliste National Park. Benefits from being able to offer: natural assets including beaches with world class surf breaks, tall-timber forests and ancient caves, as well as world class culinary offerings and wineries.

#### Why use it as a case study?

Margaret River is regarded by many as Australia's premier gourmet region. Rather than being a distinct project, in Margaret River's case, food and drink work has been developed as a core element of overall destination management delivery.

#### Key learnings

- ✓ Has a broad offering of nature-based experiences, focussed around their 'flagship' offering of the regions wine industry. The production of high quality, world-class wines has helped to create an image of prestige for the Margaret River brand.
- ✓ It has a high quality product as its starting point
- ✓ Wine-led, common with many of the world's premier food and drink destinations
- ✓ Signature event – the Margaret River Gourmet Escape
- ✓ Links between the Tourism and Food & Drink Sectors
- ✓ Alignment – fully leveraged partnership benefits through ensuring that strategic priorities are aligned (wine industry sales volumes are incorporated in the project alongside tourism outcomes.)
- ✓ Itineraries and packaging – the Tourism Associations work on itineraries, interpretative stories and building distribution of tour options has started to add significant value
- ✓ Responsive tourism structures – strong linkages between the food and drink and tourism sectors (packages provide for the needs of both sectors)
- ✓ Distribution and Trade Relationships – MRBTAs focus to date has been on marketing direct to consumers. In terms of distribution, they rely significantly on being able to leverage the reach provided by regional, state and national tourism agency partners.



# 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.

# BUZZSEEKERS

## AGE

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

## KEY MARKETS

- India, France, Germany,  
Netherlands Australia, USA

## GENDER

- 56% Male

## DEFINING ATTITUDES

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

## FAVOURITE TRAVEL ACTIVITIES

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

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

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

## GB LIKELY ACCOMMODATION (unique vs others segments)

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

## TRAVEL PLANNING & STYLE

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



## WHO ARE THEY?

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

# 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

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