Discover England Fund Research Summary Report

Cycle England: Explore England on a Bike
February 2017
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.

Contents

1. Introduction
2. Current Trends and Challenges
3a. Gateways & Transport
3b. Building an appealing cycling product
3c. Accommodation
3d. Using Technology
3e. The purchase journey
3f. Travel Trade
4. Key Take Outs
5. Appendix

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.
Introduction
Project overview

Cycle England: Explore England on a Bike

Where?

Focused in the North of England:
- Yorkshire
- Lincolnshire

Before being rolled out throughout the rest of the UK

What?

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.

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.

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.

Who?

- **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

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.
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 Côte 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

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

### 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
- Humberside Leeds, Manchester
- P&O Crossing to Hull

### Group tour
- Train to Yorkshire Wolds & Driffield

Source: Cycle England Business Case

### 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**
- Train to Lincoln city centre
- **Group tour**
- Humberside
- East Midlands, Stanstead

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.

- 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.

- 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.

<table>
<thead>
<tr>
<th>IPS 2013-2015</th>
<th>DE</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of inbound visitors visiting Yorkshire</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>IPS 2013-2015</td>
<td>DE</td>
<td>NL</td>
</tr>
<tr>
<td>% of inbound visitors visiting East Midlands</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>
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.

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 (%)

<table>
<thead>
<tr>
<th>Country</th>
<th>Welcoming to visitors</th>
<th>Open minded &amp; tolerant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>71</td>
<td>66</td>
</tr>
<tr>
<td>Netherlands</td>
<td>70</td>
<td>50</td>
</tr>
</tbody>
</table>

Source: Inbound consumer sentiment research

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 (%)

<table>
<thead>
<tr>
<th>Country</th>
<th>Welcoming to visitors</th>
<th>Open minded &amp; tolerant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>60</td>
<td>64</td>
</tr>
<tr>
<td>Netherlands</td>
<td>64</td>
<td>55</td>
</tr>
</tbody>
</table>

The weak pound makes it a good time to visit Britain
Britain is still an expensive destination
The fall in the pound makes it more likely that I will personally visit Britain

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 (%)**
- Other places higher up the list to visit: 46%
- More exciting places elsewhere in Europe as close: 26%
- No great urge to explore other parts: 21%

**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 (%)**
- So much to do in London wouldn’t have time: 39%
- The best of Britain can be seen within London: 17%

**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 (%)**
- Nervous about driving in the UK: 48%
- Too expensive to travel: 25%
- Other places worth going to far from London: 19%
- Wouldn’t know how to get outside of London: 17%

**2. Promoting regional England**
- Awareness of destinations and activities/products across our regions is a major barrier.

**Reasons for not going beyond London (%)**
- Don’t know what there is to see: 29%
- Don’t know what to expect: 25%
- Wouldn’t know what to do: 22%
- Weather would put me off: 22%

* 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**

- **Countryside**
- **Uniqueness & variety**
- **British people & way of life**
- **Cities & culture**
- **Trains, tours & packages**
- **Heritage**

**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**

- **Unique places to stay**
  - 84%
- **Countryside is unique and beautiful**
  - 81%
- **Specific cultural or historical sites**
  - 80%
- **Unique and diverse regions**
  - 79%
- **British cities are fun and vibrant**
  - 78%
- **Coastline is unique and beautiful**
  - 76%
- **Hear so much, have to experience**
  - 75%
- **Travelling is good value**
  - 74%
- **Everything in Britain is so close**
  - 74%
- **History spread around the country**
  - 73%
- **British are friendly and welcoming**
  - 72%
- **Meet British people and way of life**
  - 70%
- **Specific museums/venues to see**
  - 67%
- **Wilderness offers a place to escape**
  - 65%
- **See places made famous by media**
  - 62%
- **To do what normal British people do**
  - 61%
- **Specific concerts**
  - 61%
- **Unique so have to experience**
  - 60%
- **Countryside great for walking**
  - 55%
- **For ‘real Britain’**
  - 51%
- **For best modern day culture**
  - 43%
- **Trace ancestral route**
  - 35%
- **Sporting event**
  - 35%

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.

<table>
<thead>
<tr>
<th>Visiting rural / coastal locations</th>
<th>Yorkshire</th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countryside</td>
<td>55%</td>
<td>20%</td>
</tr>
<tr>
<td>Villages</td>
<td>44%</td>
<td>19%</td>
</tr>
<tr>
<td>Coast / beaches</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>National parks</td>
<td>26%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Participating in outdoor / sports activities:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yorkshire</th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walk in countryside</td>
<td>37%</td>
<td>24%</td>
</tr>
<tr>
<td>Walking by coast</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Playing golf</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Going cycling</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yorkshire</th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Going out to eat, drink or socialise</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dining in restaurants</td>
<td>70%</td>
<td>79%</td>
</tr>
<tr>
<td>Going to pubs</td>
<td>56%</td>
<td>48%</td>
</tr>
<tr>
<td>Socialising with the locals</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Going to bars / nightclubs</td>
<td>23%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Visiting culture related attractions

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Yorkshire</th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Famous monuments / buildings</td>
<td>44%</td>
<td>64%</td>
</tr>
<tr>
<td>Parks / gardens</td>
<td>38%</td>
<td>52%</td>
</tr>
<tr>
<td>Castles</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>Religious buildings</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Historic houses</td>
<td>28%</td>
<td>29%</td>
</tr>
</tbody>
</table>

### Visiting cultural attractions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Yorkshire</th>
<th>All UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>37%</td>
<td>48%</td>
</tr>
<tr>
<td>Art galleries</td>
<td>15%</td>
<td>26%</td>
</tr>
<tr>
<td>Theatres</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>Live music</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Festivals</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Locations (e.g. literary, film)</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

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)**
- North East: 2%
- Yorkshire: <1%
- East Midlands: <1%
- East: 1%
- London: 66%
- South East: 18%
- South West: 1%
- West Midlands: 1%
- North West: 3%

**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)**
- Air: 71%
- Sea: 22%
- Tunnel: 6%

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.

Annual Seat Capacity (from target markets to the UK)

<table>
<thead>
<tr>
<th>Airport</th>
<th>Germany destinations</th>
<th>Netherland destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Humberside</td>
<td>• None</td>
<td>• Amsterdam</td>
</tr>
<tr>
<td>East Midlands</td>
<td>• Berlin</td>
<td>• Amsterdam</td>
</tr>
<tr>
<td>Leeds / Bradford</td>
<td>• Dusseldorf, Munich, Berlin, Frankfurt</td>
<td>• Amsterdam</td>
</tr>
<tr>
<td>Manchester</td>
<td>• 10 cities</td>
<td>• Amsterdam, Rotterdam</td>
</tr>
<tr>
<td>Stansted</td>
<td>• 14 cities</td>
<td>• Amsterdam, Eindhoven</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Mode</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car/vehicle brought to UK</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Hired self-drive car/vehicle</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Private coach/minibus</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Public bus/coach (outside town)</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Taxi</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Train (outside town)</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Bus, tube, tram, metro (in city)</td>
<td>48%</td>
<td>42%</td>
</tr>
</tbody>
</table>

### Types of transport considered

<table>
<thead>
<tr>
<th>Mode</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>Scheduled/regular bus/coach service</td>
<td>39%</td>
<td>30%</td>
</tr>
<tr>
<td>Self-drive car/hire/rental</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td>Use my own car</td>
<td>40%</td>
<td>49%</td>
</tr>
<tr>
<td>Organised coach tours</td>
<td>24%</td>
<td>37%</td>
</tr>
<tr>
<td>Paid for car transport e.g. taxi/chauffeur</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>Internal flight within England</td>
<td>16%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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

   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/](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.

   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/](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.
Building an appealing cycling product

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**

<table>
<thead>
<tr>
<th>ACTIVITY CLUSTER</th>
<th>DEFINITELY / VERYY LIKELY</th>
<th>INDEX CONSIDERATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting famous / iconic attractions / places</td>
<td>88%</td>
<td>108</td>
</tr>
<tr>
<td>Experiencing city life</td>
<td>76%</td>
<td>107</td>
</tr>
<tr>
<td>Exploring history and heritage</td>
<td>75%</td>
<td>100</td>
</tr>
<tr>
<td>Experiencing rural life &amp; scenery</td>
<td>67%</td>
<td>110</td>
</tr>
<tr>
<td>Attending cultural / music / sports events</td>
<td>44%</td>
<td>82</td>
</tr>
<tr>
<td>Outdoor leisure pursuits</td>
<td>41%</td>
<td>72</td>
</tr>
<tr>
<td>Challenge and / or action</td>
<td>21%</td>
<td>67</td>
</tr>
</tbody>
</table>

**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

### Netherlands

**CONSIDERATION OF ACTIVITY CLUSTERS ON HOLIDAY TO ENGLAND**

<table>
<thead>
<tr>
<th>ACTIVITY CLUSTER</th>
<th>DEFINITELY / VERYY LIKELY</th>
<th>INDEX CONSIDERATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting famous / iconic attractions / places</td>
<td>88%</td>
<td>107</td>
</tr>
<tr>
<td>Experiencing city life</td>
<td>71%</td>
<td>100</td>
</tr>
<tr>
<td>Exploring history and heritage</td>
<td>70%</td>
<td>94</td>
</tr>
<tr>
<td>Outdoor leisure pursuits</td>
<td>68%</td>
<td>120</td>
</tr>
<tr>
<td>Experiencing rural life &amp; scenery</td>
<td>61%</td>
<td>100</td>
</tr>
<tr>
<td>Attending cultural / music / sports events</td>
<td>37%</td>
<td>69</td>
</tr>
<tr>
<td>Challenge and / or action</td>
<td>25%</td>
<td>80</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Rank</th>
<th>Netherlands</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting world famous / iconic places</td>
<td>1</td>
<td>80%</td>
<td>82%</td>
</tr>
<tr>
<td>Visiting castles / historic houses</td>
<td>2</td>
<td>81%</td>
<td>79%</td>
</tr>
<tr>
<td>Visiting historic monuments</td>
<td>3</td>
<td>72%</td>
<td>75%</td>
</tr>
<tr>
<td>Visiting a park / garden</td>
<td>4</td>
<td>76%</td>
<td>74%</td>
</tr>
<tr>
<td>Trying food &amp; drink specialties</td>
<td>5</td>
<td>76%</td>
<td>70%</td>
</tr>
<tr>
<td>Short (&lt;2hrs) country / coastal walk</td>
<td>6</td>
<td>65%</td>
<td>69%</td>
</tr>
<tr>
<td>Visiting a museum</td>
<td>7</td>
<td>55%</td>
<td>56%</td>
</tr>
<tr>
<td>Exploring villages / rural areas</td>
<td>8</td>
<td>63%</td>
<td>54%</td>
</tr>
<tr>
<td>Cycling or mountain biking</td>
<td>9</td>
<td>26%</td>
<td>17%</td>
</tr>
</tbody>
</table>

- 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

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

*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’.

<table>
<thead>
<tr>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting a National Park: 100%</td>
<td>Exploring villages / rural areas: 83%</td>
</tr>
<tr>
<td>Visiting a castle / palace / historic house: 94%</td>
<td>Trying food &amp; drink specialities: 79%</td>
</tr>
<tr>
<td>Visiting a park / garden: 91%</td>
<td>Visiting a park / garden: 71%</td>
</tr>
<tr>
<td>Exploring villages / rural areas: 91%</td>
<td>Visiting a castle / palace / historic house: 70%</td>
</tr>
<tr>
<td>Trying local food &amp; drink specialities: 87%</td>
<td>Food &amp; drink tour / attraction: 70%</td>
</tr>
<tr>
<td>Short walk: 87%</td>
<td>Other adrenalin activity: 68%</td>
</tr>
<tr>
<td>Seeing world famous / iconic places: 82%</td>
<td>Event associated with local traditions: 65%</td>
</tr>
<tr>
<td>Visiting historic monument: 81%</td>
<td>Visiting religious building: 62%</td>
</tr>
<tr>
<td>Visiting a museum: 77%</td>
<td>Short walk: 61%</td>
</tr>
<tr>
<td>Event associated with local traditions: 76%</td>
<td>Gourmet Meal: 61%</td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Food related activities considered in England</th>
<th>Rank* position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>4th</td>
</tr>
<tr>
<td>Trying local food &amp; drink specialities</td>
<td>73%</td>
</tr>
<tr>
<td>Having a gourmet meal</td>
<td>57%</td>
</tr>
<tr>
<td>Food &amp; drink tour or attraction</td>
<td>54%</td>
</tr>
<tr>
<td>Germany</td>
<td>5th</td>
</tr>
<tr>
<td>Trying local food &amp; drink specialities</td>
<td>70%</td>
</tr>
<tr>
<td>Having a gourmet meal</td>
<td>41%</td>
</tr>
<tr>
<td>Food &amp; drink tour or attraction</td>
<td>39%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3rd</td>
</tr>
<tr>
<td>Trying local food &amp; drink specialities</td>
<td>76%</td>
</tr>
<tr>
<td>Having a gourmet meal</td>
<td>60%</td>
</tr>
<tr>
<td>Food &amp; drink tour or attraction</td>
<td>45%</td>
</tr>
</tbody>
</table>

- 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).

*Rank position among a list of 40 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)

- 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 Food & Drink Research, 2017

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 enjoyable 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.
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.

- 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.

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

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>5.0</td>
<td>3.4</td>
</tr>
<tr>
<td>Rest Of England</td>
<td>4.1</td>
<td>6.5</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3 nights</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>4-7 nights</td>
<td>46%</td>
<td>43%</td>
</tr>
<tr>
<td>8-14 nights</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>15+ nights</td>
<td>10%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>18-34 yrs</th>
<th>35-54 yrs</th>
<th>55+ yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>No children</td>
<td>57%</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>Exploring independently with no set plan</td>
<td>54%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Follow a self-guided route / itinerary e.g. from a guide book</td>
<td>46%</td>
<td>43%</td>
<td>45%</td>
</tr>
</tbody>
</table>

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

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.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Website</td>
<td>Everything needed to plan a tour</td>
<td>Developed in April 2016</td>
<td>A box of maps and detailed information on all associated attractions for the 16 regional connection routes</td>
<td>A useful brochure, including 1:100,000 scale route map</td>
<td>Detailed maps</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>2. App</td>
<td>All-inclusive packages</td>
<td>Useful information, such as routes, signs, rest stops, topography, attractions and lodging</td>
<td>Estimate time and distance to destination</td>
<td>Contains useful information on/around the Vennbahn</td>
<td>No online booking, but visitors directed to travel agents and operators for bookings</td>
<td>Throughout the entire route</td>
<td>History of each section portrayed</td>
<td>Audio tours</td>
</tr>
<tr>
<td>3. Tour Planner</td>
<td>No online booking, but visitors directed to travel agents and operators for bookings</td>
<td>Developed in April 2016</td>
<td>A box of maps and detailed information on all associated attractions for the 16 regional connection routes</td>
<td>A useful brochure, including 1:100,000 scale route map</td>
<td>Detailed maps</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>4. Map</td>
<td>No online booking, but visitors directed to travel agents and operators for bookings</td>
<td>Developed in April 2016</td>
<td>A box of maps and detailed information on all associated attractions for the 16 regional connection routes</td>
<td>A useful brochure, including 1:100,000 scale route map</td>
<td>Detailed maps</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>5. Information boards</td>
<td>Detailed maps</td>
<td>Clear and consistent</td>
<td>Throughout the entire route</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>6. Signage</td>
<td>Local information</td>
<td>Clear and consistent</td>
<td>Throughout the entire route</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>7. Storytelling</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
<tr>
<td>8. Complementary products</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Clear and consistent</td>
<td>Also a core element of visitor experience</td>
<td>Products are currently being developed</td>
</tr>
</tbody>
</table>
How to optimise the Cycle England Experience Accommodation
Among all holiday visitors, accommodation is currently dominated in volume terms by mainstream hotels. Accommodation is not a motivator for visiting England; Only 16% of visitors see the variety & quality accommodation as a motivator.

Overall trend for England (excluding London) holiday visits shows the biggest increase is in hotels/guest houses.

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

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

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-range hotel</td>
<td>62%</td>
<td>56%</td>
</tr>
<tr>
<td>Bed and Breakfast / Guest House</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Staying in someone's house on a commercial basis e.g. Airbnb</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Holiday apartment / cottage</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>Budget hotel</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>High-end hotel</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>Home of family / friends</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Static caravan / home / chalet</td>
<td>7%</td>
<td>20%</td>
</tr>
<tr>
<td>Hostel</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Glamping / alternative accommodation (e.g. yurt, tipi, tree house, ecopod, etc.)</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Tent / regular camping</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Motorhome</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Touring caravan</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

### Among those who consider Challenge / or Action Activities

- 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?**

- Germany: 35% Extremely welcome, 62% Very welcome, 10% Quite welcome, 12% Not very welcome, 12% Not at all welcome
- Netherlands: 27% Extremely welcome, 62% Very welcome, 12% Quite welcome, 12% Not very welcome, 12% Not at all welcome
- All Markets: 39% Extremely welcome, 49% Very welcome, 12% Quite welcome, 12% Not very welcome, 12% Not at all welcome

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

### Customer service in accommodation
- Germany: 40% Exceeded expectations, 47% Met expectations, 13% Below expectations
- Netherlands: 25% Exceeded expectations, 70% Met expectations, 5% Below expectations

### Quality of hotel / paid accommodation
- Germany: 36% Exceeded expectations, 45% Met expectations, 19% Below expectations
- Netherlands: 30% Exceeded expectations, 64% Met expectations, 6% Below expectations

### Ease of finding the type of food you wanted to eat
- Germany: 36% Exceeded expectations, 54% Met expectations, 10% Below expectations
- Netherlands: 29% Exceeded expectations, 69% Met expectations, 2% Below expectations

### Customer service at restaurants
- Germany: 41% Exceeded expectations, 56% Met expectations, 4% Below expectations
- Netherlands: 28% Exceeded expectations, 70% Met expectations, 2% Below expectations

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:

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

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

<table>
<thead>
<tr>
<th>Germany (%)</th>
<th>Netherlands (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>38%</td>
</tr>
<tr>
<td>YouTube</td>
<td>10%</td>
</tr>
<tr>
<td>Google+</td>
<td>7%</td>
</tr>
<tr>
<td>Twitter</td>
<td>6%</td>
</tr>
<tr>
<td>Instagram</td>
<td>5%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Germany (%)</th>
<th>Netherlands (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart phone</td>
<td>86%</td>
</tr>
<tr>
<td>Tablet</td>
<td>55%</td>
</tr>
<tr>
<td>Smart watch</td>
<td>8%</td>
</tr>
</tbody>
</table>

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.

- 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.

<table>
<thead>
<tr>
<th>Google Maps</th>
<th>Strava</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycling routes have been offered for some time, and it can provide the prized turn-by-turn navigation instructions if required.</td>
<td>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)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VisitDenmark BIKE &amp; STAY</th>
<th>Vendée Vélo</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cycling the Alps</th>
<th>Cycle Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

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

**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.

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.

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**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

<table>
<thead>
<tr>
<th>Sources of Influence</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of Mouth</td>
<td>51%</td>
<td>52%</td>
</tr>
<tr>
<td>Search engines</td>
<td>44%</td>
<td>54%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Traveller review sites</td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>Social media network</td>
<td>27%</td>
<td>36%</td>
</tr>
<tr>
<td>Accommodation/hotel website</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Travel guidebook</td>
<td>32%</td>
<td>53%</td>
</tr>
<tr>
<td>Travel agent website</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Official tourist brochure</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Magazine/newspaper articles</td>
<td>23%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compared prices directly via websites of different airlines/ train/ ferry companies</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td>Compared prices via online travel agents/ tour operators/ travel comparison websites</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Looked up prices via search engines</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Researched prices online e.g. through travel websites or forums</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>Talked about prices with friends on social media</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Talked about prices with friends by phone/ mail/ face to face</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>None of these</td>
<td>19%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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

Top 5 Booking Channels for the Cycle England concept

<table>
<thead>
<tr>
<th>Channel</th>
<th>Germany</th>
<th>Netherlands</th>
<th>Average*</th>
<th>Average*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialised tour operator</td>
<td>40%</td>
<td>36%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Traditional travel agent website</td>
<td>32%</td>
<td>36%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>With the accommodation provider</td>
<td>22%</td>
<td>24%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Using travel agent's shop</td>
<td>17%</td>
<td>20%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Specialised tour operator</td>
<td>16%</td>
<td>16%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Online travel and reviews website</td>
<td>16%</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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, smartphone bookings are a small proportion of bookings (highest for package).

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booked separately</td>
<td>57</td>
<td>50</td>
</tr>
<tr>
<td>Booked together</td>
<td>42</td>
<td>46</td>
</tr>
</tbody>
</table>

**% Booked Online**
- **Transport**
  - Germany: 82%
  - Netherlands: 94%

- **Accommodation**
  - Germany: 72%
  - Netherlands: 72%

- **Package (Travel & Accommodation)**
  - Germany: 58%
  - Netherlands: 81%

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.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport within London (e.g. underground)</td>
<td>Pre book 22</td>
<td>Booked during trip 47</td>
</tr>
<tr>
<td>Train Travel (within the UK)</td>
<td>Pre book 18</td>
<td>Booked during trip 27</td>
</tr>
<tr>
<td>Airport transfer</td>
<td>Pre book 30</td>
<td>Booked during trip 20</td>
</tr>
<tr>
<td>Coach travel / long distance bus in the UK</td>
<td>Pre book 13</td>
<td>Booked during trip 20</td>
</tr>
<tr>
<td>Car hire</td>
<td>Pre book 23</td>
<td>Booked during trip 6</td>
</tr>
<tr>
<td>Flights in the UK</td>
<td>Pre book 12</td>
<td>Booked during trip 3</td>
</tr>
<tr>
<td>Sightseeing tours in London</td>
<td>Pre book 17</td>
<td>Booked during trip 22</td>
</tr>
<tr>
<td>Sightseeing tours outside of London</td>
<td>Pre book 16</td>
<td>Booked during trip 18</td>
</tr>
<tr>
<td>Tickets / passes to other tourist attractions</td>
<td>Pre book 24</td>
<td>Booked during trip 20</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
</table>
| • 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. | • 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).  
• Transport concerns (see following).  
• 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. |

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
</table>
| • 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. | • 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. |

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.

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

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

“Ban carpets in bathrooms, it is possibly the greatest pet hate of the German market.”

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.

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

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.

**Key (Proposed) Milestones for Rail Developments in the UK**

- **April 2017**
  - UK sends first trials from London to Yee, China, on New Silk Road
- **Dec 2017**
  - Eurostar opens London-Amsterdam route
- **Mid-2018**
  - Construction of Phase 1 of HS2 starts and the Thameslink Programme completed, improving north-south travel through London
- **Dec 2018**
  - Crossrail Elizabeth Line between Paddington and Abbey Wood opens
- **Dec 2019**
  - Crossrail Elizabeth Line full service from Reading to Sheffield and Abbey Wood, via Heathrow opens
- **2020**
  - Deutsche Bahn opens London-Frankfurt route
- **Dec 2026**
  - Phase 1 of HS2 from London to Birmingham opens
- **2027**
  - HS2 Phase 2a from Birmingham to Crewe opens
- **2033**
  - HS2 Phase 2b from Birmingham to Leeds opens

Source: Euromonitor

**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).

<table>
<thead>
<tr>
<th></th>
<th>Young Active Explorers</th>
<th>Outdoor Enthusiasts</th>
<th>Lifestyle Travellers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile</strong></td>
<td>18-34 years</td>
<td>35-55 years</td>
<td>50-65+ years</td>
</tr>
<tr>
<td></td>
<td>Singles or pre-nesters</td>
<td>Families/Empty nesters</td>
<td>Empty nesters, may be retired</td>
</tr>
<tr>
<td></td>
<td>Young professionals and students</td>
<td>ABC1</td>
<td></td>
</tr>
<tr>
<td><strong>Key Markets</strong></td>
<td>Australia, Germany, India, Nordics, Spain</td>
<td>Germany, France, Spain</td>
<td>Australia, France, Germany, Spain, USA</td>
</tr>
<tr>
<td><strong>Defining attitudes &amp; traits</strong></td>
<td>Open minded, adventurous. Seeking new experiences, spontaneous, technology, trend &amp; fashion-led. Live for the moment and seek fun &amp; excitement Highly social and connected</td>
<td>Active, nature lovers, cycling, curious, off-the-beaten-track</td>
<td>Young at heart, keen to learn, considered and conscious – like to plan</td>
</tr>
<tr>
<td><strong>Key interests</strong></td>
<td>Travel, music, technology, experiencing new cultures, meeting new people</td>
<td>Walking, hiking, cycling, time close to nature</td>
<td>Staying healthy &amp; active, outdoors/nature, high culture, walking/hiking,</td>
</tr>
<tr>
<td><strong>Travel preferences</strong></td>
<td>Short breaks, city/urban destinations, activity/ action focused, tours &amp; multi-destinations, independent online booking</td>
<td>Beyond ‘sunshine’ countries, activity driven &amp; value scenery, a sense of discovery</td>
<td>Plan &amp; research in advance, easy access places, open to organised tours</td>
</tr>
<tr>
<td><strong>Holiday activities</strong></td>
<td>Soaking up culture &amp; atmosphere, natural/cultural scenery</td>
<td>Enjoying natural landscapes, getting close to nature, learning about culture/heritage/food, seeing the sights, meeting people</td>
<td>Time outdoors, walking, learning about local heritage &amp; culture, trying a new activity/skill, sampling local food</td>
</tr>
<tr>
<td><strong>Accommodation preferences</strong></td>
<td>Want the unique High quality, luxury hotels</td>
<td>Not mainstream hotel chains Independent hotels, B&amp;B, camping Quirky, close to nature</td>
<td>City stays – range from B&amp;B to 4* hotels Non-city stays – places with character (smaller hotels, B&amp;Bs, guesthouses</td>
</tr>
</tbody>
</table>

Source: VisitBritain Segmentation
## Segment Targeting Summary – Two core segments

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

Source: VisitBritain Segmentation, 2017
ADVENTURERS

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

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

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

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

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

GENDER
- 53% Male

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

UNIQUE TRAVEL ACTIVITIES (versus other segments)
- Outdoor leisure pursuits (long walks, cycling, boating)

GB LIKELY ACCOMMODATION (unique vs others segments)
- Bed & Breakfast popular

TRAVEL PLANNING & STYLE
- Friends & family are major influence
- Websites, especially ‘all in one’ ideas
- Tend to travel with one other

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

Source: VisitBritain Segmentation, 2017
BUZZSEEKERS

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.

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

Source: VisitBritain Segmentation, 2017
EXPLORERS

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.

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

SOURCE: MEDIACOM

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

Source: VisitBritain Segmentation, 2017
CULTURE BUFFS

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.

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%)

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

• VisitBritain Food & Drink Research, 2017

• Discover England Fund Travel Trade Research, 2016

• Discover England Fund Activities & Themes Research, 2017

• VisitBritain Segmentation, 2017
  – Inbound consumer sentiment research

• The Future Travel Journey

• VisitBritain Researching and Planning Research, 2016

• Discover England: summary insights on overseas visitors to England’s regions

• Visit England International Omnibus, 2013

• VisitBritain Beyond London, 2013

• IPS via Discover England: summary insights on overseas visitors to England’s regions, 2016

• Discover England Fund – Activities & Themes Research 2017

• CAA Passenger survey 2015

• VisitBritain Market and Trade profiles
  – https://www.visitbritain.org/markets/