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.
Introduction
Project overview

Six Coastal Regions
- East Coast – Hull to Harwich
- South West – South Devon & Cornwall
- North East – Northumberland
- Yorkshire Coast
- Jurassic Coast – Dorset & East Devon
- South Coast – Eastbourne Brighton & South Downs National Park

What?
- Three to five night itineraries that can be personalised through the itinerary builder.
- Off-Peak and shoulder season focus: Mar-June, Sept-Nov.
- Building on learnings from the Year 1 Coastal Pass project – focused on East Coast and targeting the Dutch market.

Who?
- Easy outdoor adventurers
- 35 – 65 years
- Travelling without children
- Previous Target segments:
  - Outdoor Enthusiasts
  - Mature Experience Seekers
- New Target Segments:
  - Explorers
  - Adventurers
- Target countries:
  - France
  - Germany
  - Netherlands

Why?
- Consumers seeking new ideas for short break touring itineraries. Presented as a simplified product offer but with the opportunity to personalise their holiday. Experience an authentic English way of life and be active.

England’s Coast provides a wealth of activities and experiences to engage and inspire the seasoned traveller to Britain. Through the rich heritage of our island nation and diverse landscapes, visitors can immerse in life by the sea, experience a rich variety of nature and wildlife and England’s only natural World Heritage Site.

Source: England’s Coast
Key Messages and areas of focus

“I like England and know it is a great place for a holiday, but I also know there is more to it than the famous cities. The problem is, I don't really know where to go to explore its diverse regions or how to get to know the real English way of life.”

- **England’s Coast** provides a wealth of activities and experiences to engage and inspire the seasoned traveller to Britain. Escape the busy tourist routes to discover the rich heritage and diverse landscapes of the English coast and immerse in how life by the sea has defined our island nation.

- As you can never be more than 120 kilometres from the sea, the coast has been pivotal to English culture and history. Its drama and majesty has inspired generations of artists, authors and musicians and today is inhabited by a rich variety of nature and wildlife in a variety of landscapes, from rugged coast to wide open spaces, quaint fishing villages to cosmopolitan towns. Enjoy England’s only natural World Heritage Site, sample delicious local seafood or simply relax and take in the awe of the sea. Choose from a selection of three- and five-day thematic itineraries to sample the very best of England’s Coast or build your own personalised itinerary online.

National Coastal Tourism Academy (NCTA) have already made considerable use of existing research data (their own, Visit Britain and other published sources)

This report therefore focuses in on specific areas of interest identified by NCTA, where existing data is available (in particular focusing on recent data releases):

- The traveller decision and purchase journey.
- How holidays are researched and booked in the three markets including specific publications preferred.
- Insight into people who visit the coast.
- Modes of transport, gateways etc.
- Deeper insight into target markets.

- Types of attractions, activities, accommodation, restaurants, transport etc preferred by Fully Independent Travellers (FITs) travelling without children from France, Germany and the Netherlands.

- Travel Trade insight and engagement.

**Discover the diverse natural landscapes that have shaped our island heritage and culture**

Source: Discover England’s Coast Briefing call Oct ‘17
Current Inbound Travel Trends to England (outside of London)

- Less than a third of all trips to England made by overseas visitors now involve a stay outside of London – the biggest challenge is to persuade visitors from France to venture beyond London.

- Whilst volumes fell in target countries in 2016, there are some overall signs of growth again in 2017.

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

- **Germany**: Visitor numbers and duration of stay inbound from Germany have dropped in 2016.

- **Netherlands**: Visits and duration have both declined.

- Visitors from both Germany and Netherlands are more likely than average to travel beyond London.

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**Holiday Visits (in 000’s) to England (Outside London)**

- France: 530
- Germany: 412
- Netherlands: 276

**Holiday Nights (in 000’s) to England (Outside London)**

- France: 3,552
- Germany: 2,338
- Netherlands: 1,506

**% Proportion of visits to England (Outside London)**

- France: 30%
- Germany: 43%
- Netherlands: 43%

Source: IPS 2002-2016
Key challenges – Political, Economic and Social environment; Threat or Opportunity for Britain’s travel market?

**Geopolitics: Safety / Security**

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

Euromonitor Travel Landscape from Top 100 Cities November 2017

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

Perceptions of Britain - Brexit

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>France</td>
<td>71</td>
<td>66</td>
</tr>
<tr>
<td>Germany</td>
<td>50</td>
<td>70</td>
</tr>
<tr>
<td>Netherlands</td>
<td>83</td>
<td>79</td>
</tr>
</tbody>
</table>

Source: Inbound consumer sentiment research

**Exchange Rate Impact (%)**

- 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

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

**Competitive Environment**

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

**Growing inbound travel to England’s regions**

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

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### 1. Competitor Destinations

Main competitor destination by country when considering visit to Britain:
- France – Ireland, Spain
- Germany – Ireland, France
- Netherlands – France, Spain

### 2. Dominance of London

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

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other places higher up the list to visit</td>
<td>46</td>
</tr>
<tr>
<td>More exciting places elsewhere in Europe as close</td>
<td>26</td>
</tr>
<tr>
<td>No great urge to explore other parts</td>
<td>21</td>
</tr>
<tr>
<td>So much to do in London wouldn’t have time</td>
<td>39</td>
</tr>
<tr>
<td>The best of Britain can be seen within London</td>
<td>17</td>
</tr>
</tbody>
</table>

### 1. Address Transport concerns

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

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nervous about driving in the UK</td>
<td>48</td>
</tr>
<tr>
<td>Too expensive to travel</td>
<td>25</td>
</tr>
<tr>
<td>Other places worth going to far from London</td>
<td>19</td>
</tr>
<tr>
<td>Wouldn’t know how to get outside of London</td>
<td>17</td>
</tr>
</tbody>
</table>

### 2. Promoting regional England

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

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t know what there is to see</td>
<td>29</td>
</tr>
<tr>
<td>Don’t know what to expect</td>
<td>25</td>
</tr>
<tr>
<td>Wouldn’t know what to do</td>
<td>22</td>
</tr>
<tr>
<td>Weather would put me off</td>
<td>22</td>
</tr>
</tbody>
</table>

* 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
Current Inbound Regional Trends – there continues to be a clear North / South divide in terms of holiday trips taken

Holiday Trips (in 000’s) to each region (2013-2015 average)

% Trips in the South:
- Yorkshire: 88% (France), 83% (Germany), 78% (Netherlands)
- North West: 67% (France), 52% (Germany), 47% (Netherlands)
- North East: 15% (France), 18% (Germany), 20% (Netherlands)
- East of England: 13% (France), 11% (Germany), 1% (Netherlands)
- East Midlands: 6% (France), 3% (Germany), 2% (Netherlands)
- West Midlands: 2% (France), 4% (Germany), 3% (Netherlands)
- South East (excl London): 2% (France), 4% (Germany), 2% (Netherlands)
- London: 3% (France), 5% (Germany), 2% (Netherlands)

Average number of nights stayed in England (2015)

<table>
<thead>
<tr>
<th>Country</th>
<th>Total England</th>
<th>London</th>
<th>Rest Of England</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>4.5</td>
<td>3.9</td>
<td>5.3</td>
</tr>
<tr>
<td>Germany</td>
<td>5.6</td>
<td>4.1</td>
<td>6.8</td>
</tr>
<tr>
<td>Netherlands</td>
<td>5.0</td>
<td>3.4</td>
<td>6.5</td>
</tr>
</tbody>
</table>

Duration of stay in England (2015)

<table>
<thead>
<tr>
<th>Country</th>
<th>1-3 nights</th>
<th>4-7 nights</th>
<th>8-14 nights</th>
<th>15+ nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>13%</td>
<td>53%</td>
<td>27%</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>29%</td>
<td>46%</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>13%</td>
<td>43%</td>
<td>17%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Considerations:
- The French stay for a shorter time.
- The Dutch are the most likely to visit areas outside of the South of England.
- Shorter itineraries will increase potential particularly for the French and Dutch markets.

Source: IPS via Discover England: summary insights on overseas visitors to England’s regions 2016
England beyond London is rarely known or understood

4 main themes in the barriers to travelling beyond London:

- Lack of knowledge
- Lack of desire to visit
- Transport concerns
- Belief that London has everything

**Implications**

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

The level of knowledge is low for attractions and destinations. In particular, beaches and the coastline are least understood.

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

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

<table>
<thead>
<tr>
<th>Theme</th>
<th>Know a great deal</th>
<th>Know nothing about it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture and its people</td>
<td>30%</td>
<td>36%</td>
</tr>
<tr>
<td>Historical sites outside London</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>The countryside</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Cultural attractions outside London</td>
<td>13%</td>
<td>30%</td>
</tr>
<tr>
<td>Other major cities</td>
<td>13%</td>
<td>29%</td>
</tr>
<tr>
<td>Rural towns</td>
<td>12%</td>
<td>25%</td>
</tr>
<tr>
<td>Beaches/coastline</td>
<td>6%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Source: VisitBritain Beyond London, 2013
However, the triggers to travel beyond London tie in well with themes included within England’s Coast

**Triggers to go beyond London**

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

**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%

**Implications**

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

Source: IPS via Discover England: summary insights on overseas visitors to England’s regions 2016
How to optimise the England Coast Opportunity

Accessing Regional England & the Coast
Currently a very low proportion of visits to England are to the coast

Implications:
- The primary challenge is to get visitors to visit the regions of England. Currently the South has the highest share of visitors. The coast is the biggest draw in the South West with almost half visiting the coast.
- The East and Yorkshire will require strong communications to encourage visits.

14% of visitors to Britain visit the coast while on holiday*  
*IPS 2016

Over 30% say the coast is a location they would like to stay in in Britain.  
*GfK-Anholt NBI 2015  
Fr 31%, DE 32%

% of visitors to the region who visited the coast

Source: Discover England Fund Activities & Themes Research, 2017
The older audience are visiting the coast more, but awareness and consideration remain the main challenges to overcome.

- England’s Coast has identified a target audience in those aged over 35 years.
- This audience has slightly higher awareness and interest in visiting beaches/coastline compared to the average.
- Overall though there is a need to generate increased interest in the coastline, either directly or through alignment with other regional attractions.

- Behaviour data shows that those aged over 55 are most likely to visit the beach and/or walk along the coast.
- They are more likely to stay in hotels and less likely to camp.
- The chart below illustrates how duration of stay increases with age.
- Over 65’s are more likely to visit in summer months.

### Awareness and Interest in Visiting

<table>
<thead>
<tr>
<th>Rural towns &amp; villages</th>
<th>Beaches &amp; coastline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
<tr>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>32%</td>
<td>19%</td>
</tr>
<tr>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>29%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Duration of Stay in Britain

<table>
<thead>
<tr>
<th>All</th>
<th>35-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
<td>13%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>13%</td>
<td>38%</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>10%</td>
<td>17%</td>
<td>39%</td>
<td>28%</td>
</tr>
<tr>
<td>14%</td>
<td>20%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Timing of Stay in Britain

<table>
<thead>
<tr>
<th>All</th>
<th>35-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td>31%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>15%</td>
<td>31%</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>11%</td>
<td>33%</td>
<td>34%</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Activities done in Britain

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Visiting Coast or Beaches</th>
<th>Walking along the coast</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-34</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>35-54</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>55-64</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>65+</td>
<td>14%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: IPS 2010 - 2014
Coastal Towns visitor data shows the importance of southern destinations

**Market Size (annual)**

- **1.6 million overseas visitors**
  5% of all visitors to UK
- **0.7 million holiday visitors**
  6% of UK holiday visitors

**Source Markets (holiday visitors)**

- Germany: 203,000
- France: 96,000
- Netherlands: 63,000
- Nordics: 50,000
- USA: 34,000
- Australia: 30,000
- Spain: 27,000
- Italy: 25,000
- China: 5,000

All data relates to annual averages 2013-15

IPS measures people who ‘stayed’ in a town rather than ‘visited’

**Most Visited Destinations**

- Brighton: 211,000
- Hastings: 99,000
- Eastbourne: 74,000
- Bournemouth: 68,000
- Torbay: 36,000
- St. Ives: 36,000
- Dover: 36,000

**Seasonality**

- Jan - Mar: 12%
- Apr - Jun: 23%
- Jul - Sep: 35%
- Oct - Dec: 24%

**Age**

- Aged 16-34 years: 28%
- Aged 35-54 years: 27%
- Aged 55 years or over: 42%

**Implications**

- Currently visitors are mainly going to coastal towns in the South. Building awareness of towns on the northern walks will be important.
- The southern coastal regions may resonate best with trade and visitors initially at least.

Source: Destination Type Summaries March 2017
How to optimise the England Coast Opportunity

Gateways and Transport
The skew towards southern gateways provides a challenge for the three Northern coastal regions

- The majority of visitors to England enter through London or the South East – and tend to stay near that gateway region.
- Rail and Seaports are a popular way of getting to the UK from the European destinations.
- The launch of the direct Eurostar services from the Netherlands may increase this further, given the volume of visitors from France already entering via the tunnel.

**Sources:**

- IPS via Discover England: summary insights on overseas visitors to England's regions 2016, VisitBritain Market summaries
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 left-hand-drive**
- **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 trains from London to Yiwu, 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 Shenfield and Abbey Wood, via Heathrow opens
- **2020**
  - Deutsche Bahn opens London-Frankfurt route
- **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

**Short-term actions to address concerns**

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
Use of personal transport is quite high for the target markets, but public transport options should also be considered where appropriate

Modes of Internal Travel in UK (all visitors)

- Car/vehicle brought to UK: France 31%, Germany 23%, Netherlands 23%
- Hired self-drive car/vehicle: France 4%, Germany 9%, Netherlands 6%
- Private coach/minibus: France 7%, Germany 5%, Netherlands 5%
- Public bus/coach (outside town): France 7%, Germany 5%, Netherlands 5%
- Taxi: France 24%, Germany 26%, Netherlands 25%
- Train (outside town): France 17%, Germany 24%, Netherlands 20%
- Bus, tube, tram, metro (in city): France 48%, Germany 42%, Netherlands 48%
- Domestic flight: France 1%, Germany 1%, Netherlands 1%
- Ferry/boat: France 2%, Germany 3%, Netherlands 2%

- The Dutch are most likely to bring their own transport with them
- Car hire, taxis and private coaches increase further the proportion travelling by road in 'personal' transport
- Public Transport is used around a quarter of visitors from each country in non-urban areas

- Both the French and German visitors are interested in going 'off the beaten track'. However accessibility is important with clear information provided on transport options and journey details.

Imagine that you are going to be spending a week on holiday/vacation exploring different places in Britain. To what extent would you be interested in doing each of the following things? Percentage of respondents who selected 'Completely interested' (2014)

<table>
<thead>
<tr>
<th>Activity</th>
<th>France</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off beaten track</td>
<td>69%</td>
<td>64%</td>
</tr>
<tr>
<td>Train to travel from place to place</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Rent a car</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Day trips</td>
<td>61%</td>
<td>65%</td>
</tr>
<tr>
<td>Full guided tour</td>
<td>45%</td>
<td>39%</td>
</tr>
<tr>
<td>Planned itinerary</td>
<td>52%</td>
<td>40%</td>
</tr>
</tbody>
</table>

Note: no data available for Netherlands
Source: Anholt GfK NBI 2015

Implications

- When planning itineraries it is important to consider both the gateways used and the internal modes of transport.
- Information should provide journey times and clear routes both to the coastal destination and waypoints within the itinerary.
- It may be appropriate to view some itineraries as suitable for public transport and others that require personal transport to complete.
- Clear signage, maps and journey information will be essential to reassure the nervous drivers.

Source: VisitBritain Market and Trade profiles, Discover England: summary insights on overseas visitors to England’s regions
Public transport, fully independent travel and self-guided routes are most popular, but older travellers are also interested in guided tours

- Public transport is widely considered, however car hire and use of own car are also popular, the latter particularly among German travellers.
- The consideration of taxis and chauffeurs perhaps provides a potential option for guided tours and travel within planned itineraries.

Types of transport considered

<table>
<thead>
<tr>
<th>Types of transport considered</th>
<th>France</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Train</td>
<td>52%</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Scheduled/regular bus/coach service</td>
<td>39%</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Self-drive car hire/rental</td>
<td>45%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Use my own car</td>
<td>49%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Organised coach tours</td>
<td>37%</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>Paid for car transport e.g. taxi/chauffeur</td>
<td>22%</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Internal flight within England</td>
<td>29%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Cycling / as part of a cycle tour</td>
<td>22%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Transport provided by friends/family</td>
<td>17%</td>
<td>12%</td>
<td>11%</td>
</tr>
</tbody>
</table>

This is then reflected in the type of holiday exploration undertaken.
- There is consistency across the countries in FIT.
- The Dutch are the least likely to use any form of guidance or tour.
- Older travellers are more likely to use some form of guidance either through a guide book or an organised coach tour.

Exploring / seeing sights on holiday:
Always / Frequently do

<table>
<thead>
<tr>
<th>Exploring independently with no set plan</th>
<th>35-54 yrs No children</th>
<th>55+ yrs No children</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Germany</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>53%</td>
<td>52%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Follow a self-guided route / itinerary e.g. from a guide book</th>
<th>35-54 yrs No children</th>
<th>55+ yrs No children</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>46%</td>
<td>49%</td>
</tr>
<tr>
<td>Germany</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>37%</td>
<td>37%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Join a guided / organised walking tour</th>
<th>35-54 yrs No children</th>
<th>55+ yrs No children</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Germany</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Join a guided / organised bus / coach tour</th>
<th>35-54 yrs No children</th>
<th>55+ yrs No children</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>13%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: DEF Themes and Activities Research 2017
Perceptions of the Coast

How to optimise the England Coast Opportunity

Perceptions of the Coast
Whilst the coast is not well known, perceptions are generally positive and emotive

- Germany and Netherlands are more likely to have visited the coast and countryside on holiday. Interest in visiting in the future is also higher in these two markets than France.
- The Coast is seen as quaint, but often not ‘on the radar’. Cliffs and the village life of fishing villages are where it fits the English identity.
- Low awareness and high interest of rugged coastline suggests potential to interest possible visitors in the Netherlands, where this aspect of the coastline is seen to be particularly exciting and feels different.

I didn’t realise they had coasts and cliffs like that in England. I thought we have enough coastline of our own but this is different. (Germany)

The English coast was good in the 50s and 60s but now it’s decaying and rusty, going downhill fast in places. Maybe it’s fascinating because it’s all morbid and dead. (Germany)

If you compare it to ours, ours is very flat, the whole coastline is flat like you get in many countries. In the English coastline it’s capricious, dramatic changes, in very short spaces and spaces of time. (Netherlands)
Concept testing reflects the appeal of the project, but also highlights the need to communicate clearly and demonstrate uniqueness.

Explore England’s Coast
The concept:
“I like England and know it is a great place for a holiday, but I also know there is more to it than the famous cities. The problem is, I don’t really know where to go to explore its diverse regions, or how get to know the real English way of life.

England’s Coast provides a wealth of activities and experiences to engage and inspire the seasoned traveller to Britain. The themed itineraries all escape the busy tourist routes and help you discover the rich heritage and diverse landscapes of the English coast, revealing how life by the sea has defined our island nation.

As you can never be more than 120 kilometres from the sea, the coast has been pivotal to English culture and history. Its drama and majesty has inspired generations of artists, authors and musicians. Today it is inhabited by a rich variety of nature and wildlife in a variety of landscapes, from rugged coast to wide open spaces, from quaint fishing villages to cosmopolitan towns. Enjoy England’s only natural World Heritage Site, sample delicious local seafood, or simply relax and take in the awe of the sea.

Choose from a selection of three and five day thematic itineraries to sample the very best of England’s Coast, or build your own personalised itinerary online.

England’s Coast – Discover the diverse natural landscapes that have shaped our island heritage and culture”

Concept testing – Germany and Netherlands

| Positive take-outs | “Beautiful routes and views, discovering beautiful places in England.”
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Excitement &amp; liking</td>
<td>“Enjoy the English countryside and the coast”</td>
</tr>
<tr>
<td>See the real country</td>
<td></td>
</tr>
<tr>
<td>Visit places I couldn’t previously</td>
<td></td>
</tr>
<tr>
<td>Easy to get around</td>
<td></td>
</tr>
<tr>
<td>Take the stress out of organising a holiday</td>
<td></td>
</tr>
<tr>
<td>Nature</td>
<td></td>
</tr>
<tr>
<td>Culture</td>
<td></td>
</tr>
<tr>
<td>Peace</td>
<td></td>
</tr>
<tr>
<td>Relaxation</td>
<td></td>
</tr>
</tbody>
</table>

Possible booking channels:
Travel agent shop (DE)/website (NL)
Specialised tour operator (DE)

Watch-outs

| Clarity | “The organized trip and you have only minutes to see something” |
| Relevance | |
| Believable | |
| Uniqueness | “It sounds rather boring” |
| Price perceptions | |

Implications
• There is a genuine interest in visiting England’s coast.
• The authenticity of the experience comes through, along with the opportunity to get ‘off the beaten track’.
• However, whilst broad appeal is good, it can also reduce the clarity and impact of the offer.
• It will therefore be important to ensure that whilst itineraries can be personalised there is clear focus and identified themes in order to give the product real identity.

Source: DEF Concept Testing 2017
Enhancing the Coastal Experience
Themes and Activities
Activities and themes research gives direction for focus areas for potential itineraries that will have wide appeal

The recent DEF Themes & Activities research explored a wide range of activities that are relevant to itineraries that England’s Coast may create. Specific references to the coast were included in three individual activities:

• Sunbathing on a beach or by a pool;
• Short (less than 2hrs) country or coastal walk;
• Long (over 4hrs) country or coastal walk.

Famous tourist attractions have the widest appeal across all countries and are likely to be important focal points for both pre-set and individualised itineraries.

Beyond this, there are differences in the country specific preferences that may influence local communications and marketing activity.

• Visitors from Germany are most likely to want to experience ‘real’ life, both rural and in cities.
• Dutch visitors are also more interested in outdoor leisure.
• The French are most likely to want to attend cultural events.

Source: DEF Activities & Themes March 2017
Looking at the more detailed activities there are clear opportunities to develop itineraries around specific themes

• Outdoor activities that enable visitors to explore the landscapes appeal. The interest in boat trips could be capitalised on through trips that allow visitors to see coastline and/or wildlife they couldn’t see from the land.
• History and heritage is an important theme and itineraries that enable visitors to see a range of attractions including both significant historic landmarks and those that illustrate the local history and culture will have wide appeal.
• Collaboration with other tourism projects could be beneficial in developing itineraries around rural life and scenery.

Source: DEF Activities & Themes March 2017
Itinerary concepts can be developed around a wide variety of themes, with adjustment to reflect individual country interests.

**Interest in taking part in…**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trying an adventure / adrenalin activity</td>
<td>16%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Doing water sports including sailing, canoeing</td>
<td>17%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Cycling or Mountain biking</td>
<td>17%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Taking part in competitive sports e.g. running, football</td>
<td>13%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Attending English language classes / a course</td>
<td>19%</td>
<td>30%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**Interest in…**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting a museum</td>
<td>56%</td>
<td>68%</td>
<td>55%</td>
</tr>
<tr>
<td>Visiting an art gallery</td>
<td>33%</td>
<td>47%</td>
<td>23%</td>
</tr>
<tr>
<td>Shopping for clothes</td>
<td>39%</td>
<td>49%</td>
<td>39%</td>
</tr>
<tr>
<td>Shopping for locally made products / crafts</td>
<td>17%</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Shopping for luxury or designer products</td>
<td>17%</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>Visiting a park / garden</td>
<td>74%</td>
<td>64%</td>
<td>56%</td>
</tr>
<tr>
<td>Having a gourmet meal</td>
<td>30%</td>
<td>46%</td>
<td>60%</td>
</tr>
<tr>
<td>Trying local food and drink specialities</td>
<td>16%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Having a spa / beauty / wellness treatment</td>
<td>16%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Experiencing local nightlife e.g. local bars / pubs, clubs</td>
<td>16%</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Visiting a place / attraction associated with contemporary culture</td>
<td>36%</td>
<td>36%</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Interest in…**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting famous / iconic tourist attractions / places</td>
<td>39%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Visiting a Film / TV / literature attraction</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Visiting a theme park</td>
<td>28%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Seeing world famous or iconic sights and places</td>
<td>39%</td>
<td>82%</td>
<td>77%</td>
</tr>
<tr>
<td>Food and drink tour or attraction e.g. vineyard, brewery</td>
<td>39%</td>
<td>80%</td>
<td>50%</td>
</tr>
</tbody>
</table>

The greater French interest in a range of cultural activities can be seen above. The French are also most likely to be interested in English courses. All visiting countries have an interest in local food and drink.
The clustering of activities directly linked to the coast illustrates some notable differences between countries.

- Almost all Germans who would sunbathe would also be interested in short and long walks. For the French it is short walks that are of most interest.
- Among those who are interested in short walks, there is no significant increase in interest in sunbathing, but longer walks are of slightly increased interest.
- Where long walks are of interest most people would also consider short walks. Sunbathing is of slightly increased interest; illustrating the potential for itineraries that combine both active and relaxing elements.

Source: DEF Activities & Themes March 2017
### Regions
- The South of England is most popular.
- Destinations within a day-trip of London.
- Cotswolds growing in interest.

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

German Operator

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

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

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

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

### Competition
- Scotland, Ireland, Nordics

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

“**London is both a blessing and a curse.”**

US operator

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

“The northern areas of England are beautiful and have a lot to offer. The problem is that there is no consumer marketing and no help to provide inspiration to potential visitors”.

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

“**The northern areas of England are beautiful and have a lot to offer. The problem is that there is no consumer marketing and no help to provide inspiration to potential visitors”.**

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

“**The northern areas of England are beautiful and have a lot to offer. The problem is that there is no consumer marketing and no help to provide inspiration to potential visitors”.**

---

Source: Discover England Fund Travel Trade Research, 2016
Travel Trade – Perceptions of England, themes and activities. Many concerns will be addressed by Discover England Fund projects

<table>
<thead>
<tr>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Travel agents are a strong sector.</td>
<td>• 1/3 of international French travellers booked though tour operators and agencies.</td>
<td>• See tour operator role as changing – more specialist. Emphasis on adding value and offering original travel products.</td>
</tr>
<tr>
<td>• England seen as safe.</td>
<td>• England provides the combination of safety and off-the-beaten track experiences.</td>
<td>• England is an all-round tour destination.</td>
</tr>
<tr>
<td>• Resurgence in coach tours.</td>
<td>• Demand for personalised products.</td>
<td>• London is stand-alone and not necessarily part of a wider England tour.</td>
</tr>
<tr>
<td>• Personalised, specialist products (different from the OTA offer).</td>
<td>• Late bookings increasing</td>
<td>• Have tried and failed to sell central and northern England destinations in the past – this will increase the challenge for selling in for new products.</td>
</tr>
<tr>
<td>• Brexit concerns around not being welcome.</td>
<td>• Brexit concerns, but also see benefit of exchange rate.</td>
<td>• Want more cheap flights to regional airports and greater ferry capacity.</td>
</tr>
<tr>
<td>• Rural England more attractive than cities.</td>
<td>• General and specialist (film, music, history) tours.</td>
<td>• More cohesion in regional products and more proactive development – information &amp; genuine packages.</td>
</tr>
<tr>
<td>• South of England still the focus, limited interest in other regions.</td>
<td>• The North difficult to sell – lack of awareness.</td>
<td></td>
</tr>
<tr>
<td>• Bed &amp; Breakfast recognised as a unique English strength.</td>
<td>• Proximity, culture, language, diversity all strengths.</td>
<td></td>
</tr>
<tr>
<td>• Fundamental elements to address:</td>
<td>• Barriers: Inflexibility for groups, nothing new, accommodation &amp; food.</td>
<td></td>
</tr>
<tr>
<td>• Poor service and value (quality &amp; price) seen as barriers.</td>
<td>• Attractions not catering for groups.</td>
<td></td>
</tr>
</tbody>
</table>

Source: Discover England Fund Travel Trade Research, 2017
Completing the experience: Accommodation
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.
- Over half of visitors from target countries book their accommodation and travel separately.
- Over half of accommodation bookings are made direct with the provider.
- Over 70% make that booking online.

**Accommodation Trends (outside London)**

- Overall trend for England (excluding London) holiday visits shows the biggest increase is in hotels/guest houses.
- Potential for growth in alternative accommodation – bed and breakfast, camping etc.
- The Dutch are most likely to camp currently.

**Implication**

- Visibility online is key to the success of accommodation providers, for awareness, consideration and booking.
- This is both through their own online channels and through OTAs, DMOs, review sites etc.
- This is important for both large hotels and smaller independents/alternative accommodation types that form part of the ‘authentic/real’ England experience.
Types of accommodation considered illustrates the potential for growth of 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>France</th>
<th>Germany</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-range hotel</td>
<td>56%</td>
<td>62%</td>
<td>55%</td>
</tr>
<tr>
<td>Bed and Breakfast / Guest House</td>
<td>49%</td>
<td>47%</td>
<td>43%</td>
</tr>
<tr>
<td>Staying in someone’s house on a commercial basis</td>
<td>34%</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Holiday apartment / cottage</td>
<td>43%</td>
<td>42%</td>
<td>43%</td>
</tr>
<tr>
<td>Budget hotel</td>
<td>28%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>High-end hotel</td>
<td>32%</td>
<td>31%</td>
<td>16%</td>
</tr>
<tr>
<td>Home of family / friends</td>
<td>20%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Static caravan / home / chalet</td>
<td>20%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Hostel</td>
<td>14%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Glamping / alternative accommodation (e.g. yurt, tipi, tree house, ecopod, etc.)</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Tent / regular camping</td>
<td>6%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Motorhome</td>
<td>5%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Touring caravan</td>
<td>3%</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

Source: DEF Themes and Activities Research 2017
Accommodation is seen as a barrier for development of England’s tourism by the Travel Trade

Overall Availability & Capacity

Occupancy data shows England running at 81% - 85% capacity over the summer months, leaving little opportunity for additional bookings and supporting the Travel Trade concerns around availability in Peak season.

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

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

Availability & Capacity by type and location

Highest August occupancy areas:

- South West: 87%
- South East: 83%
- Greater London: 82%

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

August occupancy highlights a challenge particularly for seaside accommodation.

The Travel Trade finds it difficult to book smaller accommodation (self-catering, B&B, small hotels etc.).
Accommodation is seen as a barrier for development of England’s tourism by the Travel Trade

Travel Trade have concerns around Quality and Value of Accommodation

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

Accommodation in England is perceived to be

- Poor quality
- Expensive
- Poor service standards and welcome
- Perception of food quality

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

While these views may not reflect in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England Opportunity.

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

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

Source: England Occupancy Survey August 2017, DEF Travel Trade Research June 2017
Completing the Experience
Food & Drink
Food and drink, whilst not a driver to visit is an important part of the whole experience

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

- Trying British dishes is of interest, particularly full English breakfasts (49% extremely/very interested), roast dinners (46%), fish & chips (45%) and afternoon teas (45%).

- But there is also high interest for more local food and drink specialities – and the **low association of some of these could be expressed as a unique experience**.

Source: VisitBritain Food & Drink Research, 2017
Quality is an important area to focus on

- With 46% of all inbound visits including a visit to a pub, it is already an established behaviour that can be built on.
- Social media is used to look for recommendations for places to eat Germany 15%, France 19%, Netherlands 15%, so online visibility is important for restaurants and pubs
- Women are more likely to try local food and drink specialities, but older people are less likely to:

<table>
<thead>
<tr>
<th>Age</th>
<th>Would try local specialities</th>
<th>Would try high quality (gourmet food &amp; drink)</th>
</tr>
</thead>
<tbody>
<tr>
<td>35 – 44 years</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td>45 – 50 years</td>
<td>73%</td>
<td>66%</td>
</tr>
<tr>
<td>51 – 64 years</td>
<td>68%</td>
<td>60%</td>
</tr>
<tr>
<td>Over 64 years</td>
<td>65%</td>
<td>52%</td>
</tr>
</tbody>
</table>

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

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

Source: VisitBritain Food & Drink Research, 2017
Optimising the Experience Using Technology
Social media presence is now part of everyday life

### Social Media Usage

<table>
<thead>
<tr>
<th>Platform</th>
<th>Germany (%)</th>
<th>France (%)</th>
<th>Netherlands (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>Weekly</td>
<td>Daily</td>
<td>Weekly</td>
</tr>
<tr>
<td>Facebook</td>
<td>38</td>
<td>49</td>
<td>55</td>
</tr>
<tr>
<td>YouTube</td>
<td>10</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Google+</td>
<td>7</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Twitter</td>
<td>6</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Instagram</td>
<td>5</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Pinterest</td>
<td>5</td>
<td>7</td>
<td>11</td>
</tr>
</tbody>
</table>

Facebook and YouTube dominate.

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

### Tech ownership

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

### Activity

- Passive usage for news etc. Least like to post themselves (11%) or follow brands (14%)
- Use for information and advice and will write posts (30%) but not blogs (9%)
- Activity is generally around accessing news and liking/sharing others posts

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

**Tech on holiday**
- I like to stay connected when on holiday
- My smartphone is essential when I go on holiday
- My tablet is essential when I go on holiday

**Reviews on holiday destinations**
- **Access reviews about..**
  - Attractions/places to see on holiday
  - Places to eat or drink on holiday
  - Have done on holiday
  - Not done, but interested

<table>
<thead>
<tr>
<th></th>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to stay connected when on holiday</td>
<td>55%</td>
<td>67%</td>
<td>62%</td>
</tr>
<tr>
<td>My smartphone is essential when I go on holiday</td>
<td>63%</td>
<td>64%</td>
<td>44%</td>
</tr>
<tr>
<td>My tablet is essential when I go on holiday</td>
<td>46%</td>
<td>45%</td>
<td>25%</td>
</tr>
<tr>
<td>18% enjoy writing reviews</td>
<td></td>
<td>35%</td>
<td>18%</td>
</tr>
<tr>
<td>30% trust reviews</td>
<td>35%</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>32% have done on holiday</td>
<td>21%</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

Source: Technology and Social Media, 2016
Use of Social Media on holiday is high

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

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

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

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

Source: Technology and Social Media, 2016
Planning & Booking

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

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

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

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

<table>
<thead>
<tr>
<th>Stages:</th>
<th>Roles: Most likely an individual activity</th>
<th>Outside the US, more likely to be a joint activity</th>
<th>Outside the US, more likely to be a joint activity</th>
<th>Most likely an individual activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Research Destinations</td>
<td>52 Me, 32 Both Involved</td>
<td>38 Me, 44 Both Involved</td>
<td>33 Me, 52 Both Involved</td>
<td>56 Me, 28 Both Involved</td>
</tr>
<tr>
<td>2. Shortlist Options</td>
<td>48 Me, 41 Both Involved</td>
<td>36 Me, 50 Both Involved</td>
<td>33 Me, 57 Both Involved</td>
<td>60 Me, 27 Both Involved</td>
</tr>
<tr>
<td>3. Final Choice</td>
<td>44 Me, 40 Both Involved</td>
<td>37 Me, 47 Both Involved</td>
<td>30 Me, 59 Both Involved</td>
<td>49 Me, 34 Both Involved</td>
</tr>
<tr>
<td>4. Make Booking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: VisitBritain Researching and Planning Research, 2016, The Future Travel Journey
The planning process: The length of the booking process varies greatly by market and by age; the lead time to booking is longest in Germany and shortest among visitors from the Netherlands.

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

Decided on the destination (%)
- Typically between 3 and 6 months prior to the visit.
- Although German and French visitors may well have decided more than 6 months in advance.

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

Booked the trip (%)
- Typically booked less than 2 months in advance of visit for France and Netherlands.
- Those in Germany are most likely to have booked more than 3 months in advance.

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

Source: VisitBritain Researching and Planning Research, 2016
Travel Media Consumption

### Netherlands

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

### France

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

### 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.

Source: VisitBritain Market and Trade profiles
Price Sensitivity and the role of Online Travel Agents

Britain is perceived as an expensive place to visit by many (typically 55-65% in priority markets). Unsurprisingly therefore 9/10 inbound visitors do some form of price comparison before booking. However, that figure is skewed by long-haul travellers. 1 in 4 visitors from Netherlands say they would do no price comparisons before visiting Britain.

% who would do this before booking a holiday to Britain

- Compared prices directly via websites of different airlines/ train/ ferry companies:
  - Germany: 37%, France: 37%, Netherlands: 35%
  - Germany: 37%, France: 35%, Netherlands: 34%
- Compared prices via online travel agents/ tour operators/ travel comparison websites:
  - Germany: 35%, France: 33%, Netherlands: 34%
  - Germany: 35%, France: 34%, Netherlands: 35%
- Looked up prices via search engines:
  - Germany: 36%, France: 33%, Netherlands: 39%
  - Germany: 36%, France: 33%, Netherlands: 39%
- Researched prices online e.g. through travel websites or forums:
  - Germany: 26%, France: 25%, Netherlands: 35%
  - Germany: 25%, France: 26%, Netherlands: 36%
- Talked about prices with friends on social media:
  - Germany: 9%, France: 6%, Netherlands: 7%
  - Germany: 9%, France: 6%, Netherlands: 7%
- Talked about prices with friends by phone/ mail/ face to face:
  - Germany: 12%, France: 18%, Netherlands: 29%
  - Germany: 12%, France: 18%, Netherlands: 29%
- None of these:
  - Germany: 19%, France: 19%, Netherlands: 26%
  - Germany: 19%, France: 19%, Netherlands: 26%

Future Travel Trend – Conversational Commerce

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

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

MALE, 64, GERMANY

Source: Inbound consumer sentiment research, VisitBritain Decisions & Influences Research, 2016, The Future Travel Journey
Online Travel Agents are an increasingly important part of the travel trade

- OTAs have grown over recent years and new brands and propositions have been launched. Airbnb has over 3m listings, Booking.com has nearly doubled in size since 2015. Consolidation has led to Expedia and Priceline, Orbitz Worldwide and Travelocity dominating.
- Most operate on global or at least multi-market platforms. Technology drives the offer; app solutions are increasingly popular.
- With an ethos of ‘making travel easier’ they are looking to incorporate a wider range of travel activities into their portfolios.

Challenges to Address
Highlighted by OTAs as issues to be resolved:
- Lack of understanding among DMOs and hotel chains on how OTAs operate.
- Reluctance of some DMOs and chain hotels to share commission with OTAs.
- Attractions do not always understand how to sell online and/or work on short lead times.
- Rail & air challenges (see Transport section).

The Traveller View
OTA’s play a significant role in enabling travellers to be confident with the price they are paying.

<table>
<thead>
<tr>
<th></th>
<th>DE</th>
<th>FR</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<tr>
<td>I often compare prices from multiple OTA websites</td>
<td>62%</td>
<td>68%</td>
<td>63%</td>
</tr>
<tr>
<td>OTAs are a good way of finding a destination within my budget</td>
<td>64%</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>Best way of getting the lowest price</td>
<td>55%</td>
<td>51%</td>
<td>45%</td>
</tr>
</tbody>
</table>

%Strongly agree/agree about booking travel though OTAs

OTA’s are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low.

Actions
Increase the amount of product bookable online.
Create better linkage between destinations e.g. multi-location tours.
Package the regional air options:
  - competitive prices.
  - short transfer times.
  - provide clear info on travel times
Perceived opportunity around short, bookable trips e.g.
  - 4-5 day coach trips from & back to London.

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

- While ‘word of mouth’ is the biggest influence across all age groups on destination of choice, there are some key differences to be noted for your target markets and segments.

- Those in the Netherlands are more likely to build their holiday themselves via search engines and direct with the accommodation, while in Germany and France, word of mouth is key.

### Target Age Group Differences

- **45-64 year olds** are more likely to use online sources – but word of mouth is top influencer.

- **65+ year olds** are more likely to say they were not influenced by any online (32%) or offline (30%) sources. Word of mouth is most powerful among this group.

### Top Sources of Influence on destination

#### Sources of Influence

<table>
<thead>
<tr>
<th>Germany</th>
<th>France</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of Mouth</td>
<td>51%</td>
<td>58%</td>
</tr>
<tr>
<td>Search engines</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>Price comparison site</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Traveller review sites</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Social media network</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Accommodation/hotel website</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>Travel guidebook</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Travel agent website</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Official tourist brochure</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Magazine/newspaper articles</td>
<td>23%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: VisitBritain Researching and Planning Research, 2016
Making the booking: an online dominated process

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

<table>
<thead>
<tr>
<th></th>
<th>Transport</th>
<th>Accommodation</th>
<th>Package (Travel &amp; Accommodation)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Booked Online</td>
<td>% Booked Online</td>
<td>% Booked Online</td>
</tr>
<tr>
<td>Netherlands</td>
<td>50</td>
<td>71</td>
<td>78</td>
</tr>
<tr>
<td>Germany</td>
<td>57</td>
<td>72</td>
<td>58</td>
</tr>
<tr>
<td>France</td>
<td>60</td>
<td>72</td>
<td>81</td>
</tr>
</tbody>
</table>

Source: VisitBritain Researching and Planning Research, 2016
## The Travel Trade Landscape

### Top ten operators in the Netherlands in 2014

<table>
<thead>
<tr>
<th>Top Ten Tour Operators</th>
<th>Turnover €m</th>
<th>Pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUI Nederland</td>
<td>1,115</td>
<td>1,542,000</td>
</tr>
<tr>
<td>Thomas Cook Nederland</td>
<td>420</td>
<td>790,000</td>
</tr>
<tr>
<td>Sundio Group</td>
<td>346</td>
<td>550,000</td>
</tr>
<tr>
<td>Corendon</td>
<td>345</td>
<td>618,000</td>
</tr>
<tr>
<td>Travelbird</td>
<td>334</td>
<td>unknown</td>
</tr>
<tr>
<td>@Leisure</td>
<td>246</td>
<td>618,000</td>
</tr>
<tr>
<td>ANWB Reizen Groep</td>
<td>190</td>
<td>236,000</td>
</tr>
<tr>
<td>Vacansoleil</td>
<td>98.5</td>
<td>unknown</td>
</tr>
<tr>
<td>De Jong Intra Vakanties</td>
<td>72</td>
<td>168,000</td>
</tr>
<tr>
<td>Alltours</td>
<td>68</td>
<td>75,000</td>
</tr>
</tbody>
</table>

### Top ten operators in France in 2015/16

<table>
<thead>
<tr>
<th>Top Ten Tour Operators</th>
<th>Turnover €m</th>
<th>Pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groupe Club Méditerranée</td>
<td>1,440</td>
<td>1,250,000</td>
</tr>
<tr>
<td>Pierre &amp; Vacances Center Parcs</td>
<td>1,181</td>
<td>7,500,000</td>
</tr>
<tr>
<td>TUI France</td>
<td>620</td>
<td>NA</td>
</tr>
<tr>
<td>Transat France</td>
<td>441</td>
<td>375,000</td>
</tr>
<tr>
<td>Groupe Fram</td>
<td>394</td>
<td>NA</td>
</tr>
<tr>
<td>Groupe Voyageurs</td>
<td>362</td>
<td>NA</td>
</tr>
<tr>
<td>Thomas Cook France</td>
<td>334</td>
<td>NA</td>
</tr>
<tr>
<td>Odalys Vacances</td>
<td>246</td>
<td>2,300,000</td>
</tr>
<tr>
<td>NG Travel</td>
<td>210</td>
<td>203,283</td>
</tr>
<tr>
<td>Belambra</td>
<td>162</td>
<td>500,000</td>
</tr>
</tbody>
</table>

### Top ten operators in Germany in 2015/16

<table>
<thead>
<tr>
<th>Top Ten Tour Operators</th>
<th>Turnover €m</th>
<th>Pax</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUI Deutschland</td>
<td>4,400,0</td>
<td>6,000,000</td>
</tr>
<tr>
<td>Thomas Cook Group</td>
<td>3,500,0</td>
<td>6,100,000</td>
</tr>
<tr>
<td>DER Touristik</td>
<td>2,800,0</td>
<td>5,400,000</td>
</tr>
<tr>
<td>FITI Group</td>
<td>2,210,0</td>
<td>3,900,000</td>
</tr>
<tr>
<td>Aida Cruises</td>
<td>1,500,0</td>
<td>908,000</td>
</tr>
<tr>
<td>Alltours Flugreisen</td>
<td>1,330,0</td>
<td>1,620,000</td>
</tr>
<tr>
<td>Schauinsland Reisen</td>
<td>1,100,0</td>
<td>1,370,000</td>
</tr>
<tr>
<td>TUI Cruises</td>
<td>821,0</td>
<td>413,752</td>
</tr>
<tr>
<td>Phoenix Reisen</td>
<td>327,2</td>
<td>154,058</td>
</tr>
<tr>
<td>Hepag-Lloyd Kreuzfahrten</td>
<td>296,7</td>
<td>28,899</td>
</tr>
</tbody>
</table>

Source: VisitBritain Market and Trade profiles

---

**Major tour operators with a Britain programme**

- **Buro Scanbrit**
- **House of Britain House of Ireland**
- **pharosreizen**
- **GARDEN TOURS**
- **DFDS**
- **SNP**
- **Budd Freerries**
- **Gaëëland**
- **Verdie Voyages**
- **Salain**
- **Voyageurs du Monde**
- **Quartier Libre**

**Owned by DER Touristik**

- **DEROUR**
- **Studiosus**

**Owned by TUI Deutschland**

- **Wolters Reisen**
- **TROLL TOURS**

**Partly owned by Thomas Cook**

---

52
Choice / Motivators to visit Britain: Cultural attractions are a key motivator but our countryside is a strong motivator among considerers followed by cost

Top Motivators to Visit Britain

- Across each target market, cultural attractions are the main motivator for visiting Britain across visitors and considerers.
- ‘Countryside and natural beauty’ is among the top 3 reasons for all target markets, aside from France.
- There are potential barriers which could be used as opportunities in your messaging i.e. it’s safer in the countryside; cheaper outside London etc.

<table>
<thead>
<tr>
<th>Top 3 Motivators</th>
<th>Potential Barriers*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural attractions (46%)</td>
<td>Cost of destination (12ppt lower)</td>
</tr>
<tr>
<td>Ease of getting to the UK (44%)</td>
<td>Security / Safety (12ppt lower)</td>
</tr>
<tr>
<td>Variety of places / good deal (33%)</td>
<td></td>
</tr>
<tr>
<td>Cultural attractions (49%)</td>
<td>Cost of destination (9ppt lower)</td>
</tr>
<tr>
<td>Variety of places (41%)</td>
<td>Security / Safety (6ppt lower)</td>
</tr>
<tr>
<td>Countryside / natural beauty (38%)</td>
<td></td>
</tr>
<tr>
<td>Cultural attractions (44%)</td>
<td>Security / Safety (13ppt lower than avg)</td>
</tr>
<tr>
<td>Countryside / natural beauty (36%)</td>
<td>Ease of getting around (10ppt lower)</td>
</tr>
<tr>
<td>Vibrant cities (31%)</td>
<td></td>
</tr>
</tbody>
</table>

* Biggest gaps to all country average for motivations

Source: VisitBritain Researching and Planning Research, 2016
Bookable products: Those in the Netherlands are more likely to be spontaneous both with travel arrangements and activities. Visitors from France and Germany are more inclined to plan in detail before travelling.

### Itinerary planning vs. spontaneity

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

<table>
<thead>
<tr>
<th>Country</th>
<th>I like to be spontaneous on holiday and decide some of my itinerary at the last minute</th>
<th>I like to plan my holiday carefully before I leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>56</td>
<td>65</td>
</tr>
<tr>
<td>Germany</td>
<td>38</td>
<td>68</td>
</tr>
<tr>
<td>Netherlands</td>
<td>28</td>
<td>53</td>
</tr>
</tbody>
</table>

### Pre-bookable transport / activities

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

Source: VisitBritain Decisions & Influences Research, 2016
How to optimise the National Park Opportunity

Segment Overview
Targeting the most appropriate segments

- England’s Coast has targeted **Outdoor Enthusiasts** and **Mature Experience Seekers**.

<table>
<thead>
<tr>
<th></th>
<th>Outdoor Enthusiasts</th>
<th>Mature Experience seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile</strong></td>
<td>35-55 years</td>
<td>50-65 years</td>
</tr>
<tr>
<td></td>
<td>Families/Empty nesters ABC1</td>
<td>Empty nesters/(semi) retired</td>
</tr>
<tr>
<td><strong>Key Markets</strong></td>
<td>Germany, France, Spain</td>
<td>Australia, Germany, France, Spain</td>
</tr>
<tr>
<td><strong>Defining attitudes &amp; traits</strong></td>
<td>Active, nature lovers, cycling, curious, off-the-beaten-track</td>
<td>Young at heart – new found freedom, keen to learn, see new places</td>
</tr>
<tr>
<td><strong>Key interests</strong></td>
<td>Walking, hiking, cycling, time close to nature</td>
<td>Healthy &amp; active, time outdoors, walking/hiking, engaging with nature</td>
</tr>
<tr>
<td><strong>Travel preferences</strong></td>
<td>Beyond ‘sunshine countries, activity driven &amp; value scenery, a sense of discovery</td>
<td>Active, cultured holidays with plenty of sightseeing</td>
</tr>
<tr>
<td><strong>Holiday activities</strong></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, learning a new skill, sampling local food</td>
</tr>
<tr>
<td><strong>Accommodation preferences</strong></td>
<td>Not mainstream hotel chains, Independent hotels, B&amp;B, camping, Quirky, close to nature</td>
<td>Accommodation with character</td>
</tr>
</tbody>
</table>

- Visit Britain have been working on a new segmentation, that provides even greater insight into profiles, travel attitudes and behaviours
- In this new segmentation, there are two segments that map closely to the previous segments. They are **Explorers** and **Adventurers** (full profiles are included in the appendix).

**Share of travellers**

![Chart showing share of travellers in various countries for Adventurers and Explorers](chart.png)

Source: VisitBritain Segmentation, 2017
## Segment Targeting Summary

- **two core segments, but opportunity to also reach Culture Buffs and Sightseers**

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

Source: VisitBritain Segmentation, 2017
Summary – key take-outs
Key take-outs and opportunities (1)

Awareness of the Coast
• Regional England and the Coast are not currently main destinations for inbound visitors, but there is an interest in England's Coast – it is perceived as unique and interesting. The core offer therefore will appeal.
• Combining that message with a range of other activities will increase the appeal, though care needs to be taken not to detract from the core coastal message.

Clarity of Offer
• Whilst itineraries can cover a wide range of activities and themes which will increase appeal to a wide audience it will be important to ensure there is still a clear identity that can be communicated to and understood by both potential visitors and by the travel trade.

Engaging the Travel Trade
• Travel trade concerns around quality, pricing and book-ability particularly of accommodation needs to be addressed. Travel trade confidence is key to increasing bookings but currently some barriers exist.

Accessibility
• Regional gateways provide opportunity for growth for England's Coast. As visitors tend to stay close to their point of entry/exit, increasing volume through key gateways will be important.
• Once in the country transport needs remain key.
  – For those visitors who come by car (or hire a car) there is more flexibility around itinerary routes as well as start and finish points. However clear route maps, signage and information remain important given the nervousness around driving in this country.
  – For those without transport the challenge is much greater as public transport will limit accessibility of destinations.
### Key take-outs and opportunities (2)

#### Themes
- There are clearly a wide variety of themes that can be included within itineraries.
- The challenge may be to restrict the product offer to a volume of options that can be fully managed in terms of clear communication, accessibility, quality, price etc.

#### Collaboration with other DEF projects
- There is overlap with England’s Coast and several other DEF projects.
- Additional benefits may be gained from some collaboration e.g. Walking Trails and National Parks have considerable geographic overlap and offer activities and themes that link well with England’s Coast. Others such as Heritage Cities may also be relevant for specific itineraries.

#### Booking the Holiday
- Timings for trade and visitor communications will vary by market; e.g. Germany having a much longer booking lead time than Netherlands.
- Vlogs and Blogs are important in Netherlands particularly and could be considered alongside other communications channels.
- Price sensitivity and the growing role of OTAs are important to consider also when developing ‘go to market’ strategies.
- A lot of activities are booked during the trip and whilst there may be a wish for as much as possible to be booked in advance, in-trip bookings should also be made easy and accessible where possible.
Appendix

- Detailed segment profiles
- Data sources
**EXPLORERS**

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

**KEY MARKETS**
- Australia, Germany, France

**GENDER**
- 52% Female

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

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

**UNIQUE TRAVEL ACTIVITIES**
(versus other segments)
- Experiencing rural life & scenery
- Outdoor leisure pursuits
- Visiting parks/gardens

**GB LIKELY ACCOMMODATION**
(unique vs others segments)
- Bed & Breakfast
- Self-catering

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

**WHO ARE THEY?**

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

Source: VisitBritain Segmentation, 2017
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
**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.

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**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%

---

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.

SOURCE: VisitBritain Segmentation, 2017

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%)
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
Links to data sources

- VisitBritain Decisions & Influences Research, 2016

- VisitBritain Food & Drink Research, 2017

- Discover England Fund Travel Trade Research, 2016

- DEF Activities & Themes Research, 2017

- VisitBritain Segmentation, 2017

- The Future Travel Journey

- VisitBritain Researching and Planning Research, 2016

- VisitBritain Beyond London, 2013

- Discover England Lifestage Report

- Destination Type Summaries March 2017

- VisitBritain Market and Trade profiles
  - [https://www.visitbritain.org/markets](https://www.visitbritain.org/markets)

- DEF Visitor Research Qualitative 2017

- Technology and Social Media, 2016

- England Occupancy Survey August 2017