Discover England Fund Research Summary Report England's Coast

December 2017

Contents

- This report brings together the key findings and insights relevant to this project from across the VisitEngland research programme.

- It is designed to provide the Discover England Fund Large Project teams with a summary of the key themes and relevant market profiles. It can be used to guide project development activity and inform stakeholders and partner organisations.

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

Introduction

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

Where?

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.

England's Coast

- **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**

Who?

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.

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.

Source: Discover England's Coast Briefing call Oct '17

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

Current Trends

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.

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

- France
- Germany
- Netherlands

530
412
276

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

- France
- Germany
- Netherlands

3,552
2,338
1,506

% Proportion of visits to England (Outside London)

France	Germany	Netherlands
30	43	43
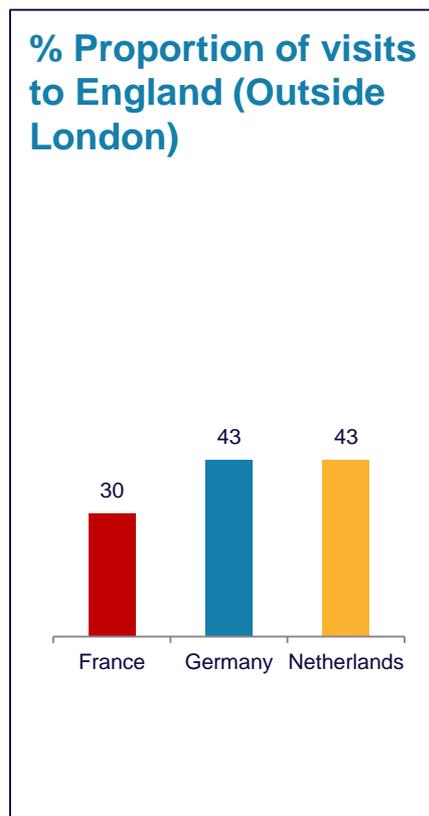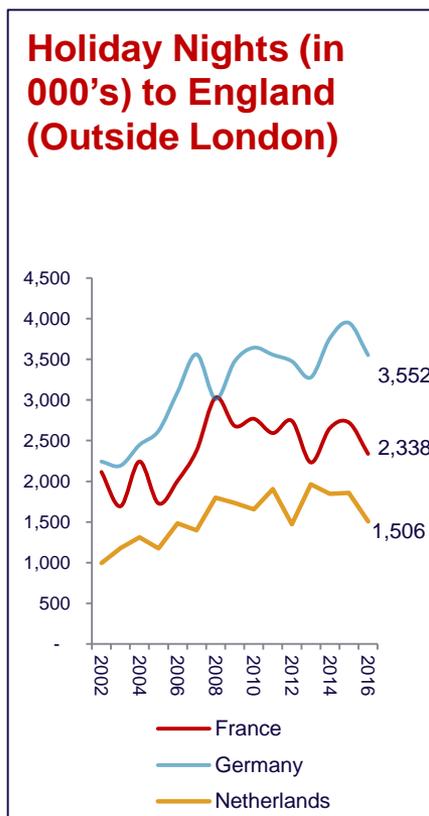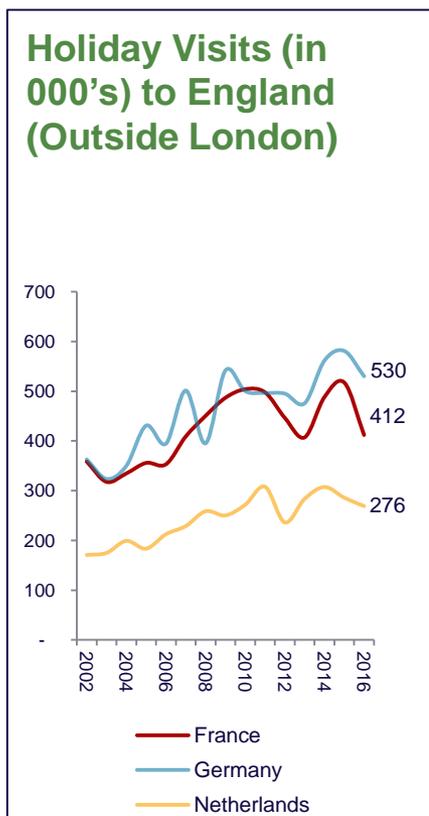
- Whilst volumes fell in target countries in 2016, there are some overall signs of growth again in 2017.

- **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.

Source: IPS 2002-2016

7

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

Geopolitics: Safety / Security

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

Euromonitor Travel Landscape from Top 100 Cities November 2017

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

Britain: Safe & Secure destination (%)

|	Aug-16	Feb/Mar-17	Sep-17
Germany	72	80	65
Netherlands	69	71	65
France	73	82	66
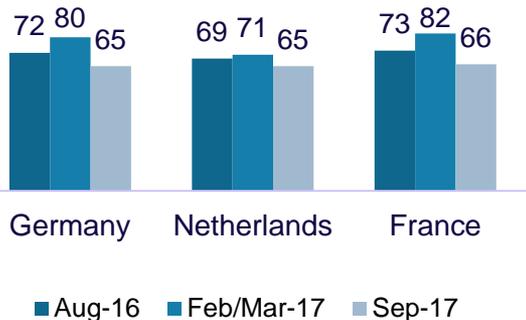
Perceptions of Britain - Brexit

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 (%)

|	Welcoming to visitors	Open minded & tolerant
France	71	66
Germany	70	50
Netherlands	83	79
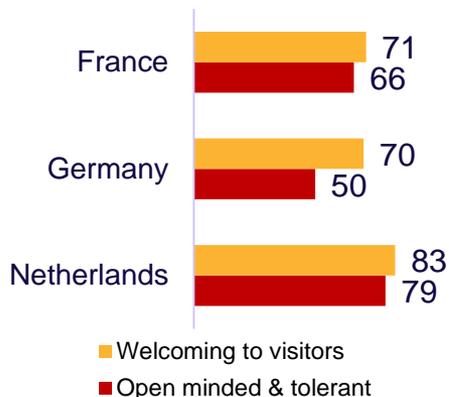
Brexit – Exchange Rate

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.

Exchange Rate Impact (%)
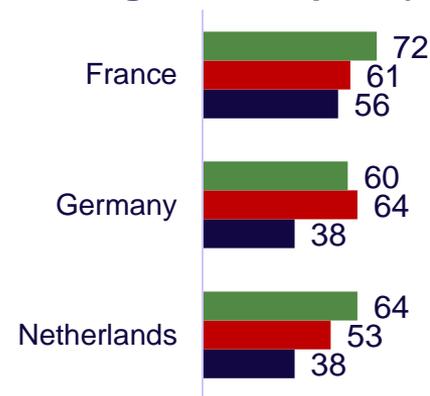
	The weak pound makes it a good time to visit Britain	Britain is still an expensive destination	The fall in the pound makes it more likely that I will personally visit Britain
France	72	61	56
Germany	60	64	38
Netherlands	64	53	38

Source: Inbound consumer sentiment research

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.

1. Competitor Destinations

Main competitor destination by country when considering visit to Britain:

- France – Ireland, Spain
- 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, particularly for France

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

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 (%)*

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
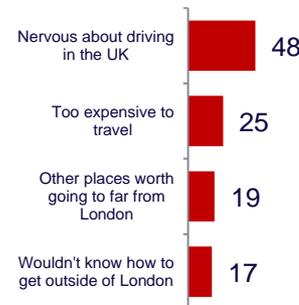
2. Promoting regional England

- 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
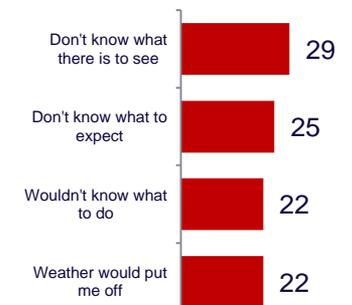
* Data is all visitors to England who only visited London

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

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
- North West
- North East
- East of England
- East Midlands
- West Midlands
- South East (excl London)
- South West
- London

France — 88%
- 2%
- 2%
- 4%
- 4%
- 2%
- 15%
- 6%
- 67%

Germany — 83%
- 3%
- 4%
- 2%
- 4%
- 3%
- 18%
- 13%
- 52%

Netherlands — 78%
- 3%
- 5%
- 2%
- 6%
- 4%
- 20%
- 11%
- 47%
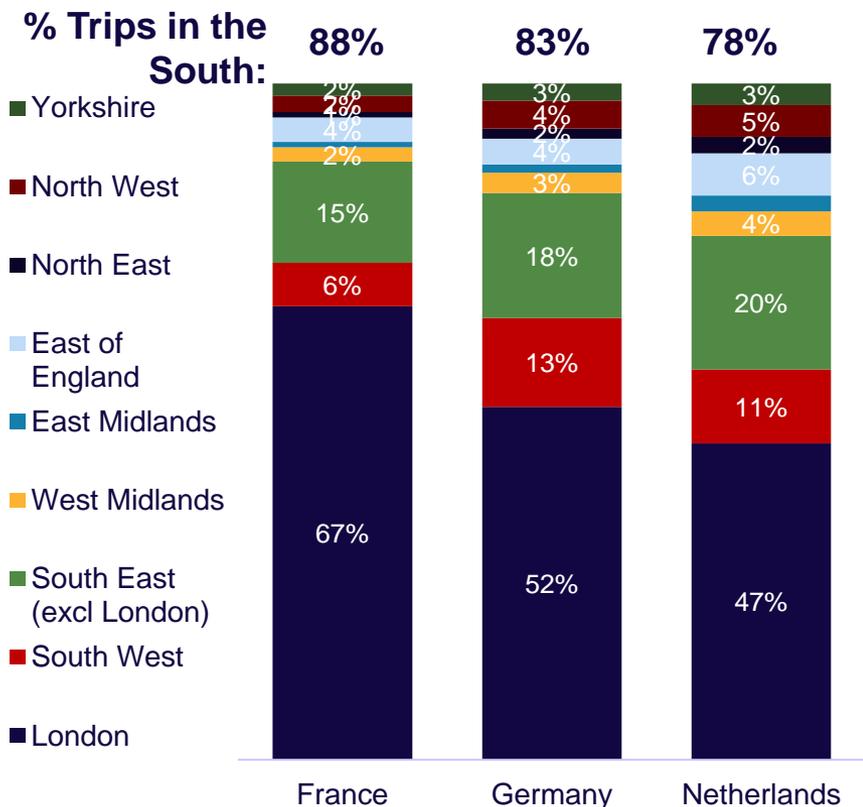
Average number of nights stayed in England (2015)

	Total England	London	Rest Of England
France	4.5	3.9	5.3
Germany	5.6	4.1	6.8
Netherlands	5.0	3.4	6.5

Legend: Total England, London, Rest Of England
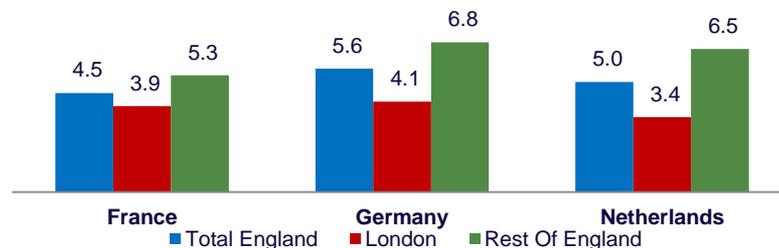
Duration of stay in England (2015)

	France	Germany	Netherlands
15+ nights	3%	10%	13%
8-14 nights	15%	27%	17%
4-7 nights	53%	46%	43%
1-3 nights	29%	16%	27%

Legend: 1-3 nights, 4-7 nights, 8-14 nights, 15+ nights
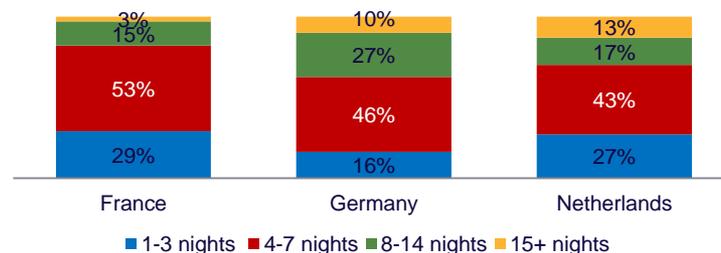
Considerations:
- The French stay for a shorter time.
- The Dutch are the most likely to visit areas outside of the South of England.
- Shorter itineraries will increase potential particularly for the French and Dutch markets.

10

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

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).

Barrier	%
Nervous about driving in UK	48%
Other places higher up the list to visit	46%
So much to do in London wouldn't have time	39%
Don't know what there is to do	29%
Don't know what it's like compared to London	27%
More exciting places elsewhere in Europe	26%
Don't know what to expect	25%
Too expensive to travel	25%
Wouldn't know what to do	22%
Weather would put me off	22%
No great urge to explore other parts	21%
Wouldn't visit GB for a long time, but would need a long…	19%
Other places worth going to are too far away from London	19%
The best of Britain can be seen within London	17%
Wouldn't know how to get outside of London	17%

What do you know about Britain outside of London?

|	Know a great deal			Know nothing about it
Culture and it's people	30%	36%	20%	8%
Historical sites outside London	17%	31%	28%	20%
The countryside	17%	31%	30%	19%
Cultural attractions outside London	13%	30%	31%	24%
Other major cities	13%	29%	31%	24%
Rural towns	12%	25%	34%	37%
Beaches/coastline	6%	23%	26%	44%

■ Know a great deal   ■ Know nothing about it

11
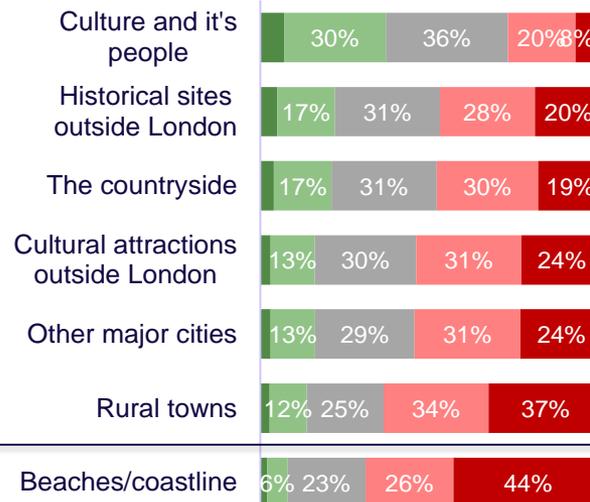
However, the triggers to travel beyond London tie in well with themes included within England's Coast

Triggers to go beyond London

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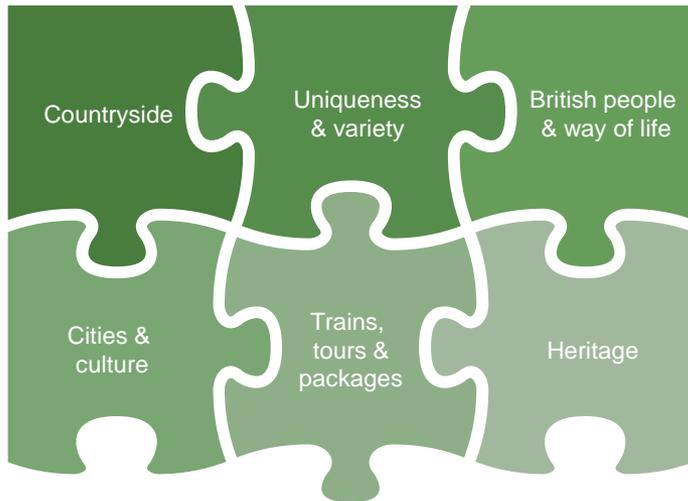
Implications

- 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.

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

Aspect	%
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%

12

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

This implies an opportunity to grow the volume of coastal visitors

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

North East
- Wild Coast

31%

IPS 2013-2015	FR	DE	NL
% of inbound visitors visiting **North East**	1%	2%	3%

Yorkshire
- Coastal Heritage

22%

IPS 2013-2015	FR	DE	NL
% of inbound visitors visiting Yorkshire	2%	3%	4%

East Coast
- Nature & Wildlife

16%

IPS 2013-2015	FR	DE	NL
% of inbound visitors visiting East	4%	5%	7%

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

South Devon & Cornwall
- Active Coast

48%

Dorset & East Devon
- Jurassic Coast

37%

East & West Sussex
- Arts & Culture

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

% of visitors to the region who visited the coast

14

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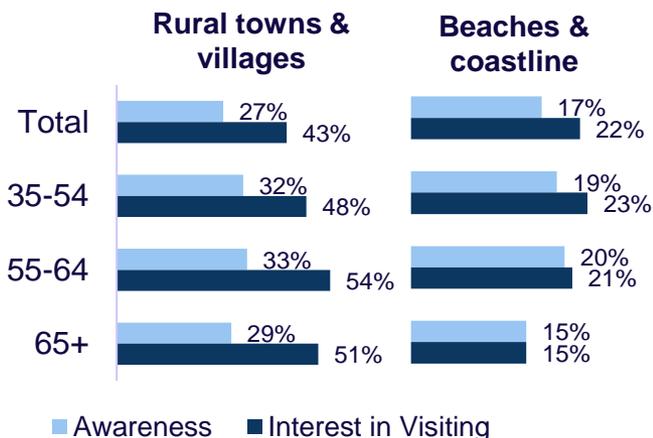
- Behaviour data shows that those aged over 55 are most likely to visit the beach and/or walk along the coast.
- They are more likely to stay in hotels and less likely to camp.
- The chart below illustrates how duration of stay increases with age.
- Over 65's are more likely to visit in summer months.

Activities done in Britain

Age	Walking along the coast	Visiting Coast or Beaches
16-34	6%	9%
35-54	11%	14%
55-64	13%	21%
65+	14%	22%

- Visiting Coast or Beaches
- Walking along the coast

Source: IPS 2010 - 2014

Rural towns & villages

	Awareness	Interest in Visiting
Total	27%	43%
35-54	32%	48%
55-64	33%	54%
65+	29%	51%

Beaches & coastline

	Awareness	Interest in Visiting
Total	17%	22%
35-54	19%	23%
55-64	20%	21%
65+	15%	15%

- Awareness
- Interest in Visiting

Duration of Stay in Britain

	All	35-54	55-64	65+
15+ nights	6%	5%	10%	14%
8-14 nights	13%	13%	17%	20%
4-7 nights	40%	38%	38%	39%
1-3 nights	40%	43%	35%	28%

- 1-3 nights
- 4-7 nights
- 8-14 nights
- 15+ nights

Timing of Stay in Britain

	All	35-54	55-64	65+
Jan-Mar	16%	15%	11%	8%
Apr-Jun	31%	31%	33%	33%
Jul-Sep	32%	33%	34%	40%
Oct-Dec	21%	21%	22%	19%

- Oct-Dec
- Jul-Sep
- Apr-Jun
- Jan-Mar

Source: Discover England Lifestage Report

15

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)

- Rest of the World
- North America
- Europe

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
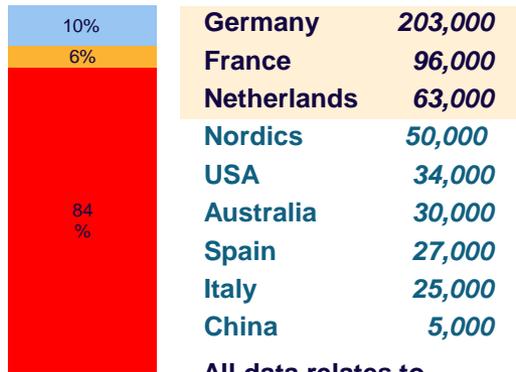
All data relates to annual averages 2013-15 IPS measures people who 'stayed' in a town rather than 'visited'

Source: International Passenger Survey (2013-15)

Most Visited Destinations
2015 holiday visitors only

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

Accommodation

- Other — 11%
- Free Guest — 10%
- Hostel/Univ/School — 4%, 6%
- Rented Accomodation — 4%
- Holiday Village — 10%
- Camping/Caravan — 10%
- B&B — 45%
- Hotel/Guest House

Seasonality

- Jan - Mar — 8%
- Apr - Jun — 35%
- Jul - Sep — 44%
- Oct - Dec — 12%

Age

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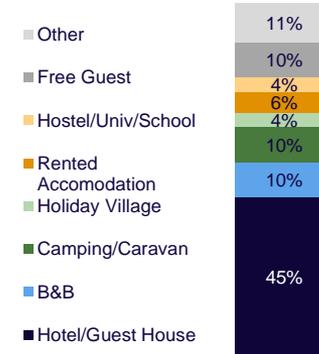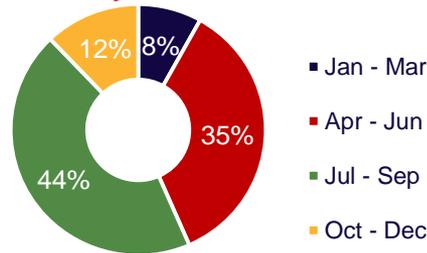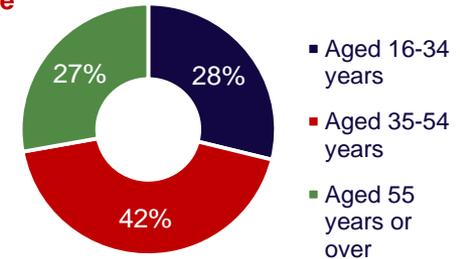
Implications

- 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.

16

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.

Gateways: Region of Entry (UK Holiday Visitors)

North East 2%

Yorkshire <1%

North West 3%

East Midlands <1%

West Midlands 1%

East 1%

South West 1%

London 66%

South East 18%

Mode of Entry (UK Holiday Visitors)

London Airports 54%

Rail 18%

Seaports 14%

Regional Airports 6%
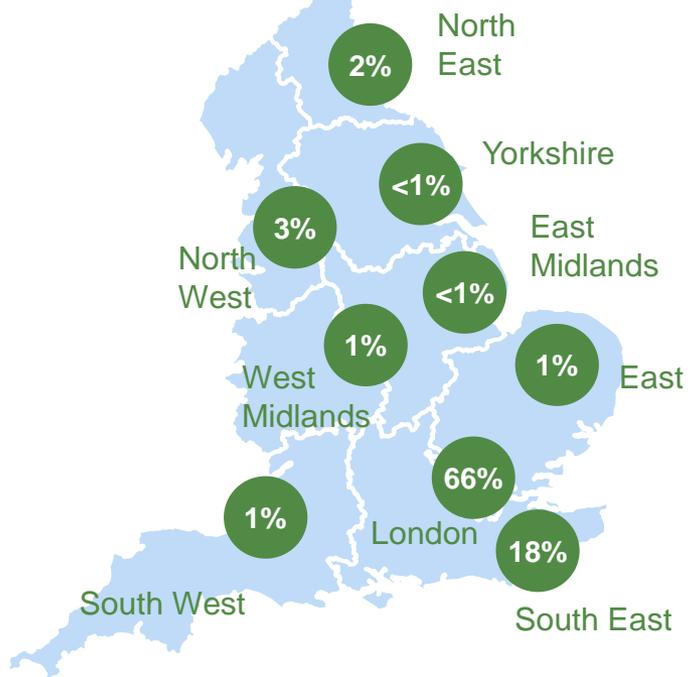
Mode of Entry (all UK Visitors)

■ Air ■ Sea ■ Tunnel

Germany
- 71%
- 22%
- 6%

France
- 39%
- 21%
- 41%

Netherlands
- 63%
- 25%
- 12%

18

Source: IPS via Discover England: summary insights on overseas visitors to England's regions 2016, VisitBritain Market summaries
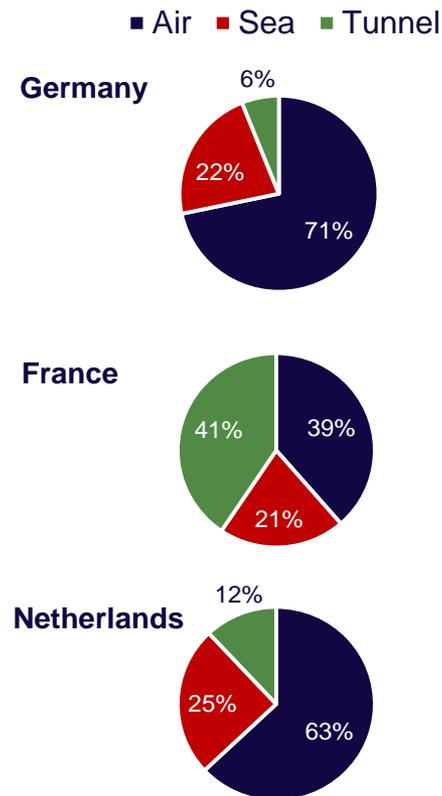
England's Transport and Accessibility cause concern in the Travel Trade

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 train 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

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 International

Short-term actions to address concwena
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.

19

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 — 23% / 23% / 31%
Hired self-drive car/vehicle — 4% / 9% / 6%
Private coach/minibus — 7% / 5% / 5%
Public bus/coach (outside town) — 7% / 8% / 5%
Taxi — 24% / 25% / 26%
Train (outside town) — 17% / 24% / 20%
Bus, tube, tram, metro (in city) — 50% / 48% / 42%
Domestic flight — 1% / 1% / 1%
Ferry/boat — 2% / 3% / 2%

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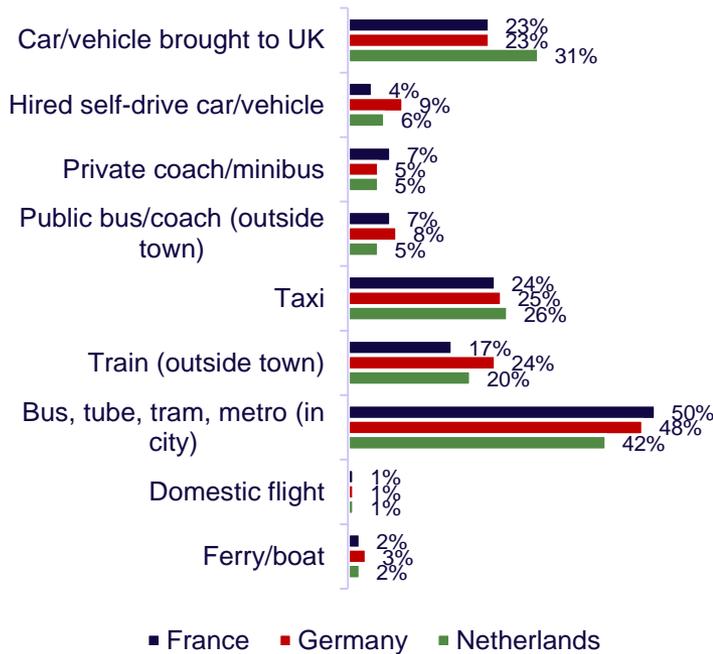
- The Dutch are most likely to bring their own transport with them
- Car hire, taxis and private coaches increase further the proportion travelling by road in 'personal' transport
- Public Transport is used around a quarter of visitors from each country in non-urban areas

- 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)

Note: no data available for Netherlands

Source: Anholt GfK NBI 2015

	France	Germany
Off beaten track	69%	64%
Train to travel from place to place	50%	44%
Rent a car	54%	53%
Day trips	61%	65%
Full guided tour	45%	39%
Planned itinerary	52%	40%

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.

20

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.

- 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.

Types of transport considered

Transport	France	Germany	Netherlands
Train	47%	50%	52%
Scheduled/regular bus/coach service	40%	39%	30%
Self-drive car hire/rental	36%	45%	41%
Use my own car	29%	40%	49%
Organised coach tours	22%	37%	24%
Paid for car transport e.g. taxi/chauffeur	19%	22%	15%
Internal flight within England	16%	29%	16%
Cycling / as part of a cycle tour	16%	22%	18%
Transport provided by friends/family	12%	17%	11%

■ France ■ Germany ■ Netherlands

Exploring / seeing sights on holiday: Always / Frequently do	France	Germany	Netherlands	35-54 yrs No children	55+ yrs No children
Exploring independently with no set plan	54%	57%	54%	53% / 67% / 57%	53% / 57% / 52%
Follow a self-guided route / itinerary e.g. from a guide book	46%	46%	37%	49% / 50% / 37%	53% / 45% / 34%
Join a guided / organised walking tour	13%	19%	8%	11% / 18% / 9%	9% / 23% / 5%
Join a guided / organised bus / coach tour	19%	22%	13%	15% / 20% / 10%	30% / 29% / 26%
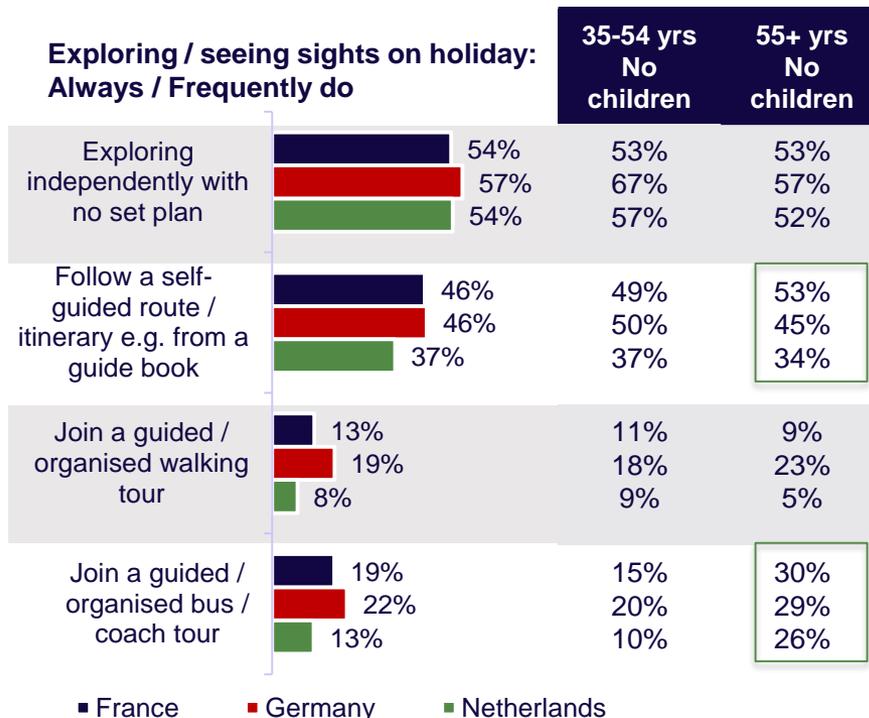
■ France ■ Germany ■ Netherlands

21

Source: DEF Themes and Activities Research 2017

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.

Locations Considered in England – Coast

Visited Coast
- 12% — **45%**
- 23% — **71%**
- 18% — **61%**

IPS 2016

Visited Countryside & Villages
- 17%
- 26%
- 20%

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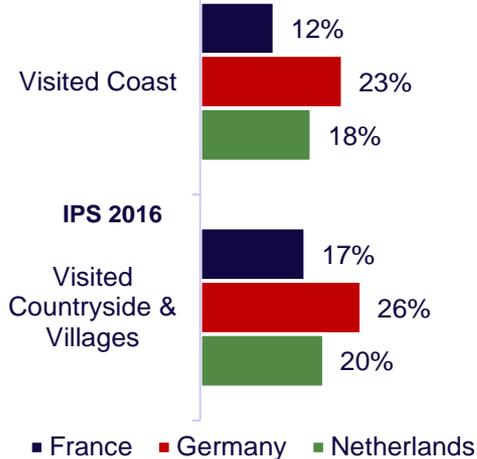
I didn't realise they had coasts and cliffs like that in England. I thought we have enough coastline of our own but this is different. (Germany)

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)

23

Source: VisitBritain Market and Trade profiles, DEF Visitor Research Qualitative 2017, DEF Activities & Themes research 2017

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
Excitement & liking
See the real country
Visit places I couldn't previously
Easy to get around
Take the stress out of organising a holiday
Nature
Culture
Peace
Relaxation

"Beautiful routes and views, discovering beautiful places in England."

"Enjoy the English countryside and the coast"

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

Watch-outs
Clarity
Relevance
Believable
Uniqueness
Price perceptions

"The organized trip and you have only minutes to see something"

"It sounds rather boring"

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

24

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.

Interest in….

Activity	Germany	France	Netherlands
Visiting famous / iconic tourist attractions / places	88%	74%	88%
Exploring history and heritage	75%	72%	70%
Experiencing city life	76%	66%	71%
Experiencing rural life & scenery	67%	49%	61%
Outdoor leisure pursuits	41%	48%	68%
Attending cultural / music / sports events	44%	55%	37%
Challenge and / or action	21%	27%	25%

■ Germany ■ France ■ Netherlands

Those with most interest in the theme
Over 55 years old
France & Germany – over 35yrs, increasing among 55+ In Netherlands - over 55+
In Germany and Netherlands – over 35 years and increasing among 55+
Over 35 years
Tends to be more a young person interest
No significant age skews
Very much a young person interest

- 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.

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.

Interest in taking part in….
Outdoor leisure pursuits

	Germany	France	Netherlands
Playing golf	12%	16%	11%
Sunbathing on the beach / by a pool	29%	22%	34%
Boating (boat trips, canal boating)	31%	44%	40%
Exploring an area by E-bike	23%	28%	22%
Going for a short country or coastal walk around <2 hours	69%	60%	65%
Going for a long country or coastal walk e.g. half a day+	46%	57%	49%
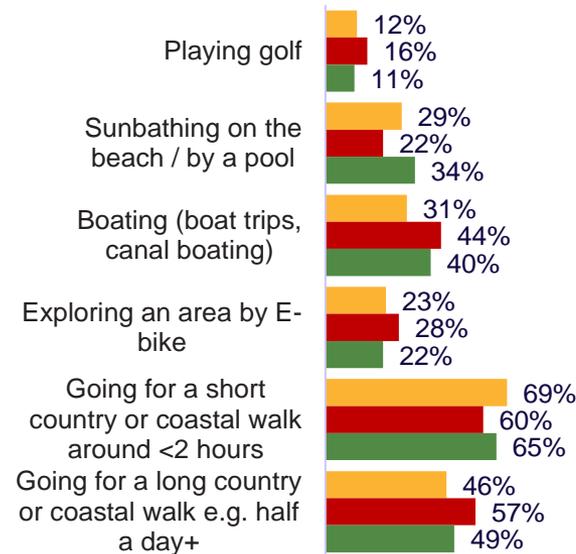
Interest in….
Exploring history and heritage

	Germany	France	Netherlands
Visiting a castle / palace / stately home or historic house	79%	74%	81%
Visiting a religious building	43%	55%	45%
Visiting a historic monument	75%	80%	72%
Attending an event associated with local traditions	52%	60%	40%
Visiting places linked to my own family history	36%	28%	33%
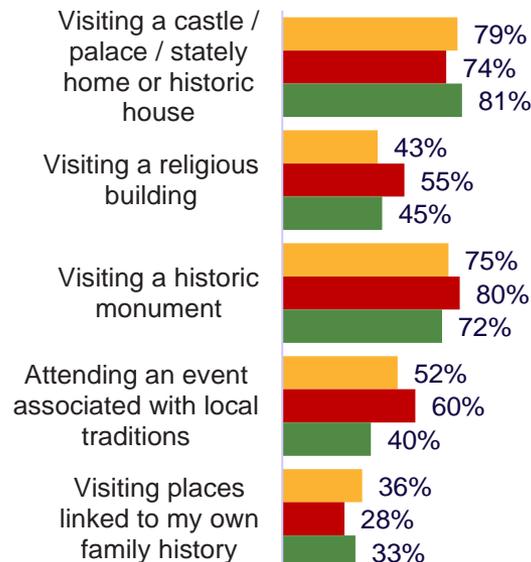
Interest in….
Experiencing rural life & scenery

	Germany	France	Netherlands
Visiting a National Park	52%	53%	52%
Watching wildlife or birdlife in its natural environment	28%	38%	18%
Astronomy / star gazing	11%	20%	12%
Exploring villages / rural areas	54%	59%	63%

■ Germany ■ France ■ Netherlands

Itinerary concepts can be developed around a wide variety of themes, with adjustment to reflect individual country interests

Interest in taking part in….
Challenge and / or action

Activity	Germany	France	Netherlands
Trying an adventure / adrenalin activity	16%	23%	22%
Doing water sports including sailing, canoeing	17%	18%	18%
Cycling or Mountain biking	17%	27%	28%
Taking part in competitive sports e.g. running, football	13%	21%	14%
Attending English language classes / a course	19%	30%	15%
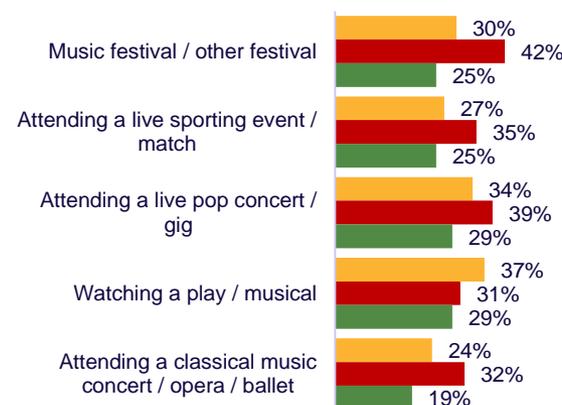
Interest in….
Visiting famous / iconic tourist attractions / places

Activity	Germany	France	Netherlands
Visiting a Film / TV / literature attraction	39%	40%	31%
Visiting a theme park	28%	31%	23%
Seeing world famous or iconic sights and places	82%	77%	80%
Food and drink tour or attraction e.g. vineyard, brewery	39%	50%	45%

Interest in….
Experiencing city life

Activity	Germany	France	Netherlands
Visiting a museum	56%	68%	55%
Visiting an art gallery	33%	47%	23%
Shopping for clothes	39%	49%	46%
Shopping for locally made products / crafts	43%	55%	38%
Shopping for luxury or designer products	17%	24%	30%
Visiting a park / garden	74%	64%	56%
Having a gourmet meal	41%	46%	60%
Trying local food and drink specialities	70%	65%	76%
Having a spa / beauty / wellness treatment	16%	30%	16%
Experiencing local nightlife e.g. local bars / pubs, clubs	46%	52%	45%
Visiting a place / attraction associated with contemporary culture	36%	49%	37%

Interest in….
Attending cultural / music / sports events

Activity	Germany	France	Netherlands
Music festival / other festival	30%	42%	25%
Attending a live sporting event / match	27%	35%	25%
Attending a live pop concert / gig	34%	39%	29%
Watching a play / musical	37%	31%	29%
Attending a classical music concert / opera / ballet	24%	32%	19%

Legend: ■ Germany ■ France ■ Netherlands

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

29% | 22% | 34%

Sunbathing on a beach

Short country/ coastal walk	Long country/ coastal walk
80%	88%
85%	46%
56%	42%

69% | 66% | 65%

Short country/coastal walk

Sunbathing on a beach	Long country/ coastal walk
21%	75%
29%	62%
23%	66%

46% | 57% | 45%

Long country/ coastal walk

Short country/ coastal walk	Sunbathing on a beach
79%	39%
96%	32%
88%	31%

● Germany   ● France   ● Netherlands
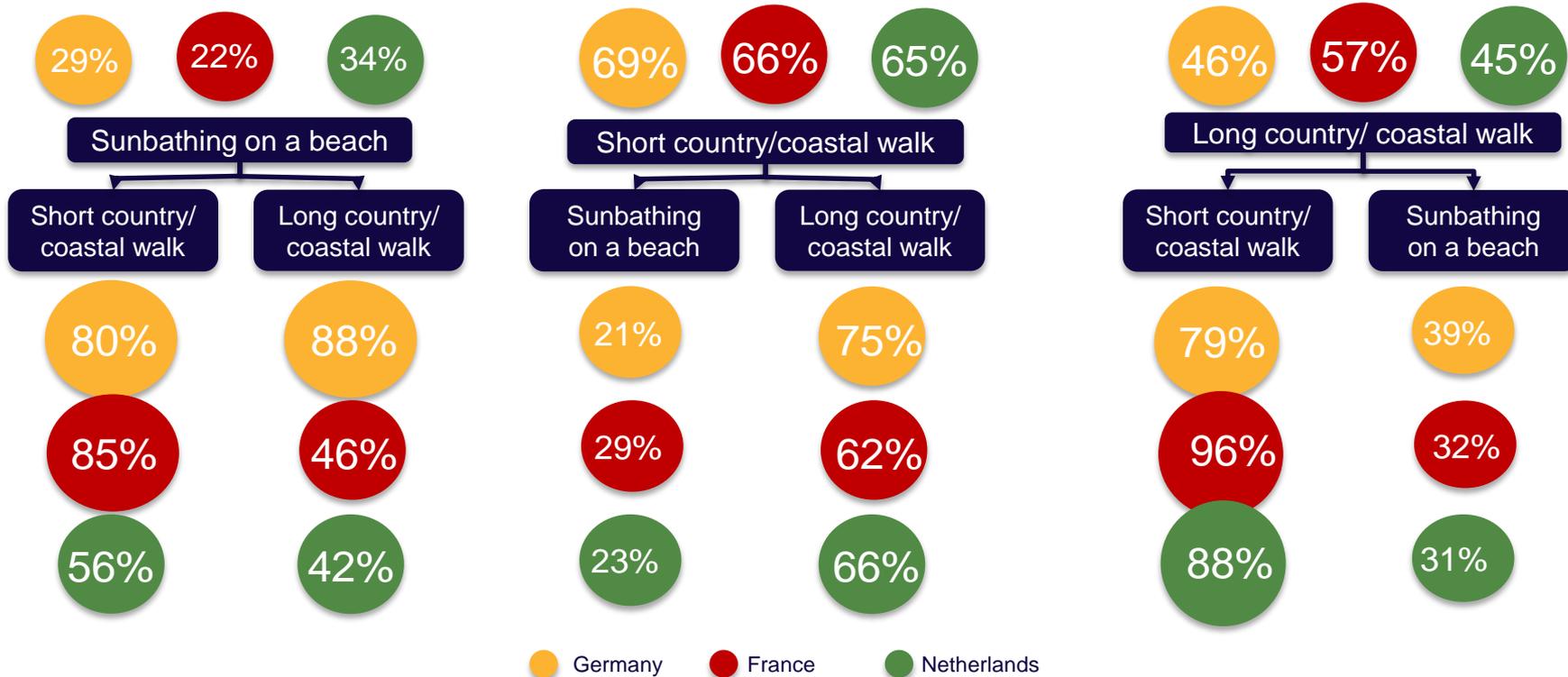
- Almost all Germans who would sunbathe would also be interested in short and long walks. For the French it is short walks that are of most interest.
- Among those who are interested in short walks, there is no significant increase in interest in sunbathing, but longer walks are of slightly increased 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

Travel Trade – Perceptions of England, themes and activities

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."

Attractions

"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."

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.

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).

Opportunity
- England is considered a safe destination among the travel trade.
- New products and packages.
- Sustained and focused promotion.
- Early release of information: 12 – 18 months before.

30

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

Germany

- Travel agents are a strong sector.
- England seen as safe.
- Resurgence in coach tours.
- Personalised, specialist products (different from the OTA offer).
- Brexit concerns around not being welcome.
- Rural England more attractive than cities.
- South of England still the focus, limited interest in other regions.
- Bed & Breakfast recognised as a unique English strength.
- Fundamental elements to address:
  - Poor service and value (quality & price) seen as barriers.
  - Attractions not catering for groups.

France

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

Netherlands

- See tour operator role as changing – more specialist. Emphasis on adding value and offering original travel products.
- England is an all-round tour destination.
- London is stand-alone and not necessarily part of a wider England tour.
- Have tried and failed to sell central and northern England destinations in the past – this will increase the challenge for selling in for new products.
- Want more cheap flights to regional airports and greater ferry capacity.
- More cohesion in regional products and more proactive development – information & genuine packages.

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)

Legend:
- Bed & Breakfast
- Camping/Caravan
- Free guest with relatives or friends
- Holiday Village
- Hostel/university/school
- Hotel/guest house
- Other
- Own home
- Paying guest family or friends house
- Rented House/Flat

(Chart y-axis: 0, 500, 1000, 1500, 2000, 2500; x-axis: 2010, 2011, 2012, 2014, 2015, 2016)
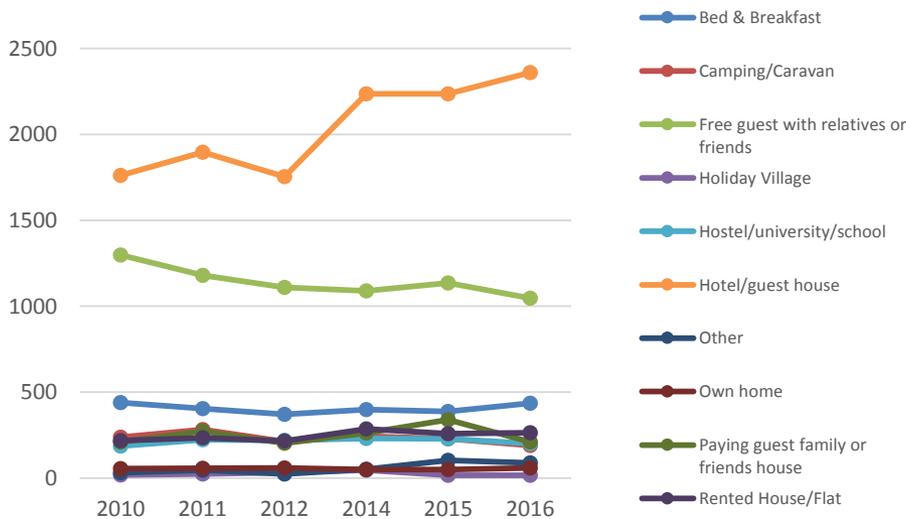
- Overall trend for England (excluding London) holiday visits shows the biggest increase is in hotels/guest houses.
- Potential for growth in alternative accommodation – bed and breakfast, camping etc.
- The Dutch are most likely to camp currently.

Accommodation Type – All UK

Country	Hotel/guest house	Free guest with relatives or friends	Bed & Breakfast	Rented house	Hostel/university/school	Camping/mobile home	Paying guest family or friends house	Other
France	56%	17%	4%	6%	4%			
Germany	62%	11%	8%	8%	6%	4%		
Netherlands	60%	12%	9%	10%	5%	8%		

Legend:
- Hotel / guest house
- Free guest with relatives or friends
- Bed & Breakfast
- Rented house
- Hostel/university/school
- Camping/mobile home
- Paying guest family or friends house
- Other

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/alterative 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

Accommodation type	France	Germany	Netherlands
Mid-range hotel	55%	62%	56%
Bed and Breakfast / Guest House	43%	49%	47%
Staying in someone's house on a commercial basis e.g. Airbnb	34%	19%	17%
Holiday apartment / cottage	29%	43%	42%
Budget hotel	25%	42%	28%
High-end hotel	16%	17%	32%
Home of family / friends	14%	16%	14%
Static caravan / home / chalet	12%	7%	20%
Hostel	11%	14%	17%
Glamping / alternative accommodation (e.g. yurt, tipi, tree house, ecopod, etc.)	7%	7%	8%
Tent / regular camping	6%	6%	10%
Motorhome	5%	12%	10%
Touring caravan	3%	6%	8%

Legend: ■ France ■ Germany ■ Netherlands

- 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.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2015	63%	74%	75%	76%	79%	83%	84%	82%	85%	83%	77%	69%
2016	62%	73%	73%	77%	78%	81%	84%	81%	85%	81%	79%	71%
2017	64%	74%	75%	78%	79%	81%	84%	81%				
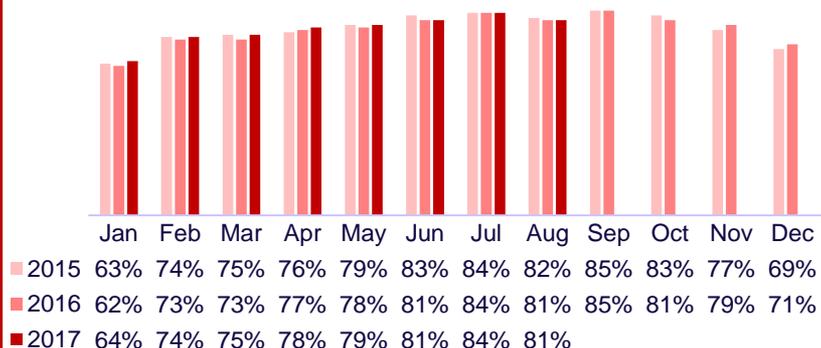
Bedspace occupancy (typically at 60% or less) suggest some scope for increasing group size (family/couples), but perhaps also reflects the Travel Trade view that there is a lack of flexible/twin rooms.

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.

Countryside 78%

Seaside 89%

Small Town 80%

City/ Large Town 80%

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.).

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

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.

36

**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.

Food & drink related activities likely to try when visiting Britain (%):

A: Gourmet meal
B: Food & drink tour or attraction
C: Trying local food & drink specialities

France: A 46, B 50, C 65
Germany: A 41, B 39, C 70
Netherlands: A 60, B 45, C 76
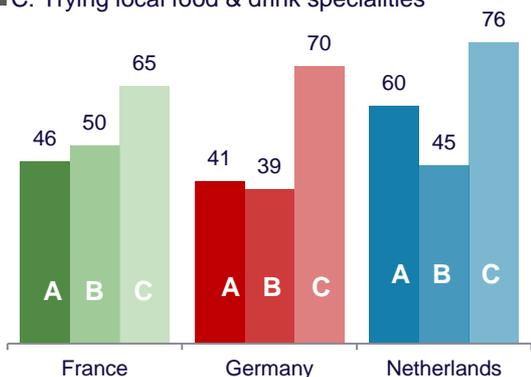
Previously tried new food on holiday: 70% 76% 58%

- **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.**

Ones to consider: Baked Goods, Meat, Seafood, Cheese, Craft Beer, Sparkling Wine, Curry. Others: Whisky, Jam Pickles Preserves, Gin & Tonic.

Axes: Associated with the UK (10%-55%) vs Interest in Trying (60%-100%)
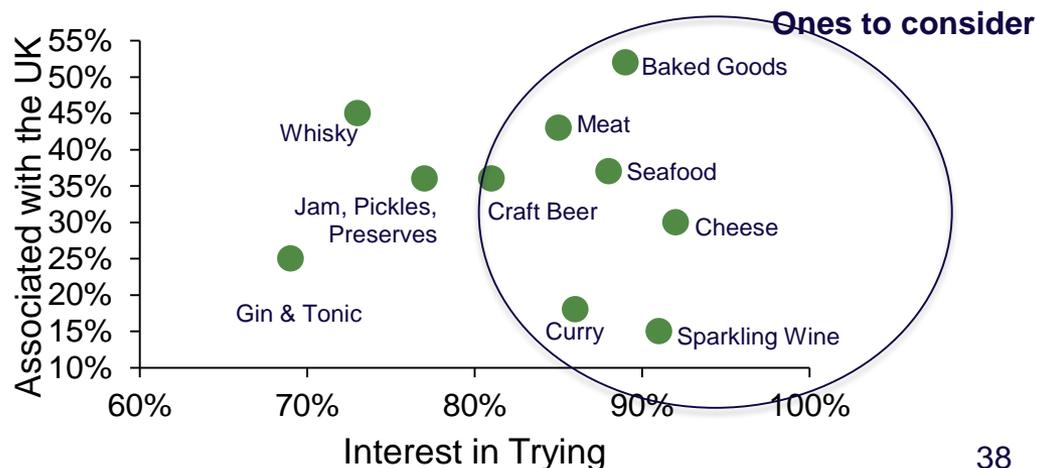
Quality is an important area to focus on

- 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:

Age	Would try local specialities	Would try high quality (gourmet food & drink)
35 – 44 years	72%	66%
45 – 50 years	73%	66%
51 – 64 years	68%	60%
Over 64 years	65%	52%

"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.

Satisfaction with Food & drink among visitors to England

Bar chart legend:
- A: Satisfaction (among visitors)
- B: British food products are good quality
- C: Good place to buy local food & drink

France: A 71, B 37, C 36
Germany: A 72, B 43, C 45
Netherlands: 80

Source: VisitBritain Food & Drink Research, 2017
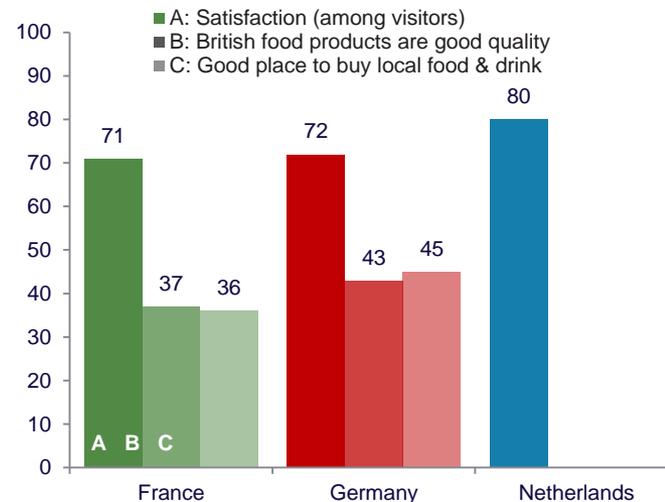
Optimising the Experience

Using Technology
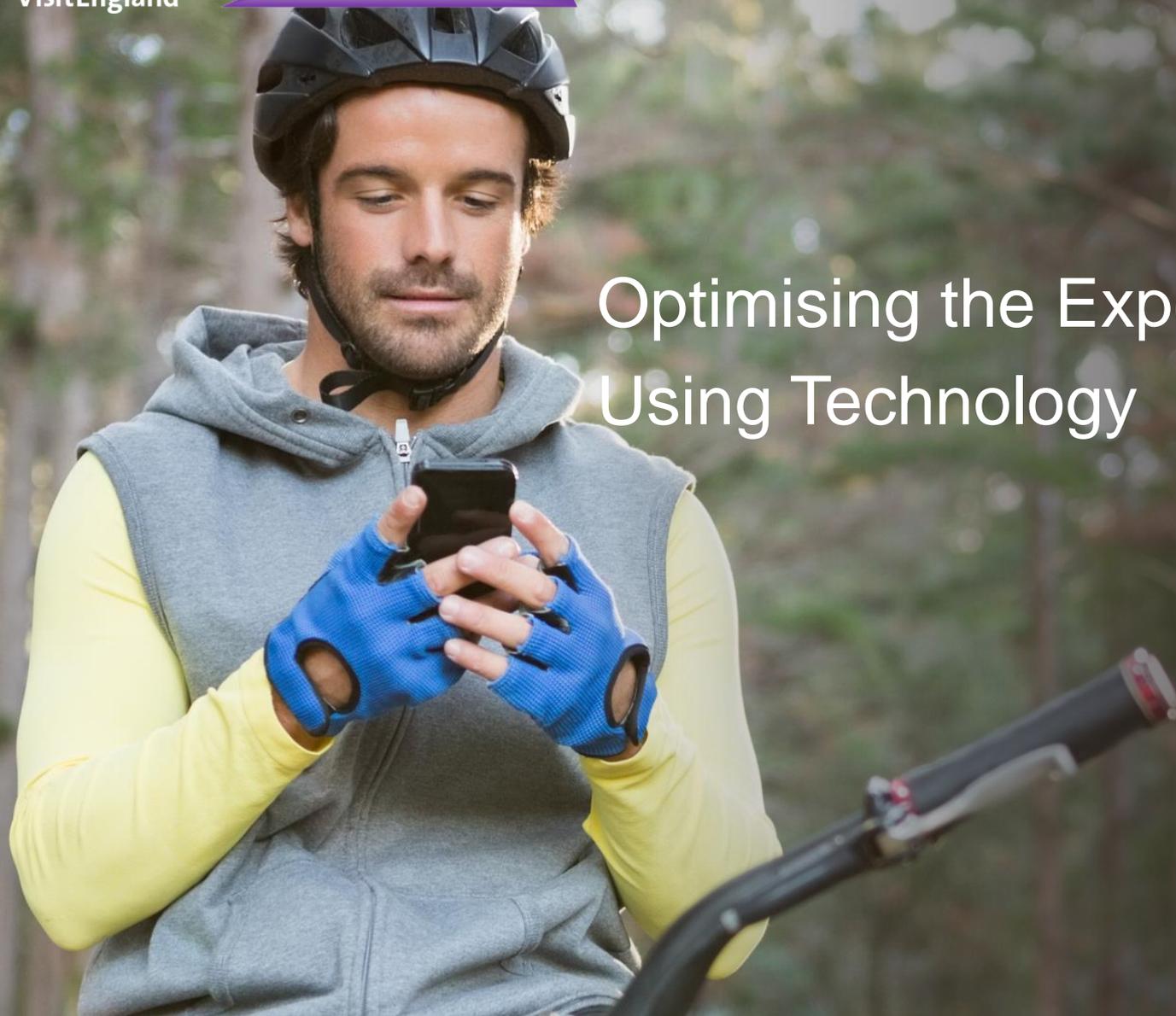
Social media presence is now part of everyday life

Social Media Usage

■ Daily ■ Weekly

Facebook and YouTube dominate.

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

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

Germany (%)

	Daily	Weekly
f	38	19
YouTube	10	28
G+	7	8
Twitter	6	6
Instagram	5	6
Pinterest	2	5

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

8%   86%   55%

France (%)

	Daily	Weekly
f	49	13
YouTube	14	27
G+	7	7
Twitter	9	9
Instagram	7	8
Snapchat	7	5

Use for information and advice and will write posts (30%) but not blogs (9%)

7%   83%   59%

Netherlands (%)

	Daily	Weekly
f	55	18
YouTube	17	30
G+	11	11
Twitter	11	9
Instagram	9	11
Pinterest	1	8

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

9%   86%   65%

- 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.

41

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

Tech on holiday

	Germany	France	Netherlands
I like to stay connected when on holiday	55%	67%	62%
My smartphone is essential when I go on holiday	63%	64%	44%
My tablet is essential when I go on holiday	46%	45%	25%

Reviews on holiday destinations

Germany: 18% enjoy **writing**, 30% **trust** reviews
France: 35% enjoy **writing**, 44% **trust** reviews
Netherlands: 18% enjoy **writing**, 40% **trust** reviews

Access reviews about..

Attractions/places to see on holiday:
- Germany: 35% / 24%
- France: 50% / 26%
- Netherlands: 46% / 26%

Places to eat or drink on holiday:
- Germany: 32% / 21%
- France: 50% / 24%
- Netherlands: 34% / 24%

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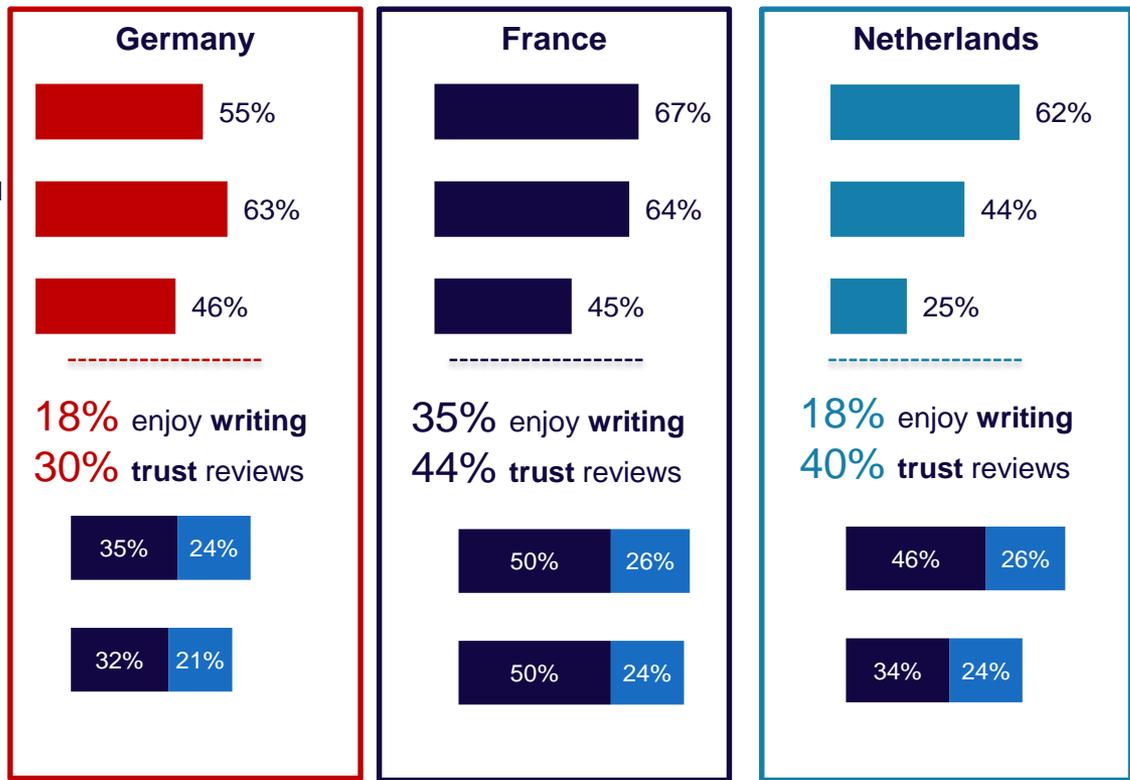
- Typically over a third do not use social media while on holiday, those that do stay in touch with friends and post photos
- Social media is not widely used during the holiday for recommendations and planning, suggesting that this information is sought from destination and attraction websites, specialist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

42

Source: Technology and Social Media, 2016

Use of Social Media on holiday is high

% using social media on holiday in Britain to….

Category	Germany	France	Netherlands
Keep in touch with people at home	31%	35%	40%
Post photos of my holiday	22%	30%	35%
Look for recommendations for places to eat or drink	15%	19%	15%
Share where you are/what you are doing	13%	17%	23%
Let people know where I am at a given moment	11%	13%	22%
Help plan where to go/what to see/do	11%	9%	14%
Ask for advice on where to go/what to do	11%	11%	6%
Share my advice/recommendations about visiting where I am	6%	7%	6%
I have not used social media at all on this holiday	47%	45%	33%

■ Germany ■ France ■ Netherlands

- 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 (%):

Stages:	1. Research Destinations	2. Shortlist Options	3. Final Choice	4. Make Booking
Roles:	Most likely an individual activity	Outside the US, more likely to be a joint activity	Outside the US, more likely to be a joint activity	Most likely an individual activity

	Research Destinations (Me / Both Involved)	Shortlist Options (Me / Both Involved)	Final Choice (Me / Both Involved)	Make Booking (Me / Both Involved)
France	52 / 32	38 / 44	33 / 52	56 / 28
Germany	48 / 41	36 / 50	33 / 57	60 / 27
Netherlands	44 / 40	37 / 47	30 / 59	49 / 34

■ Me ■ Both Involved

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.

	France	Germany	Netherlands
Less than 1 month	8	5	8
1-2 months	18	9	18
3-6 months	29	28	36
More than 6 months	42	57	32
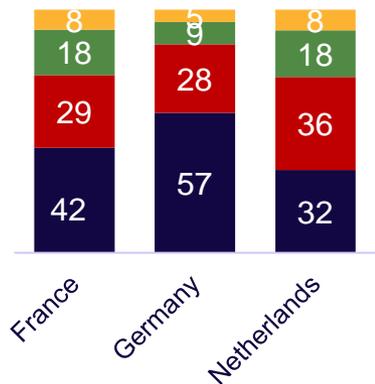
Decided on the destination (%)

- 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.

	France	Germany	Netherlands
Less than 1 month	10	7	11
1-2 months	19	13	22
3-6 months	33	40	42
More than 6 months	34	38	18
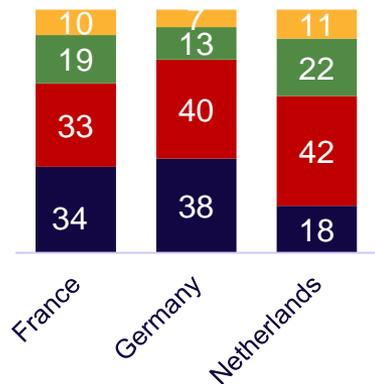
Looked at options / prices (%)

- 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.

	France	Germany	Netherlands
Less than 1 month	14	11	16
1-2 months	25	17	30
3-6 months	39	46	38
More than 6 months	18	24	9
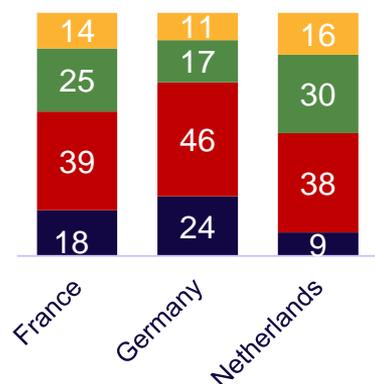
Booked the trip (%)

- 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.

	France	Germany	Netherlands
Less than 1 month	23	19	26
1-2 months	29	17	28
3-6 months	37	44	29
More than 6 months	7	15	7
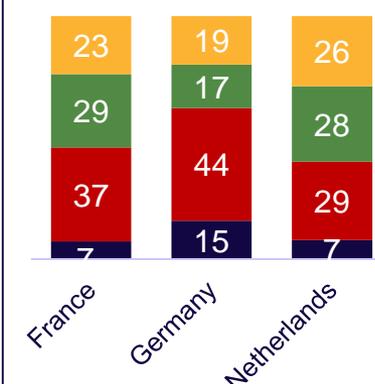
Age: 65+ year old's are most likely to decide furthest in advance across all the stages. The majority of those in the target group (45+ year olds) have booked between 3 to 6 months in advance.

Legend: ■ More than 6 months before ■ 3-6 months before ■ 1-2 months before ■ Less than 1 month before

46

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

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

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

■ Germany ■ France ■ Netherlands

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

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).

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.

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

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

%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.

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

	Germany	France	Netherlands
Word of Mouth	51%	58%	52%
Search engines	44%	42%	54%
Price comparison site	36%	35%	44%
Traveller review sites	29%	36%	37%
Social media network	27%	27%	27%
Accommodation/hotel website	28%	30%	53%
Travel guidebook	32%	43%	19%
Travel agent website	24%	24%	32%
Official tourist brochure	21%	28%	11%
Magazine/newspaper articles	23%	14%	9%

■ Online ■ Offline

50
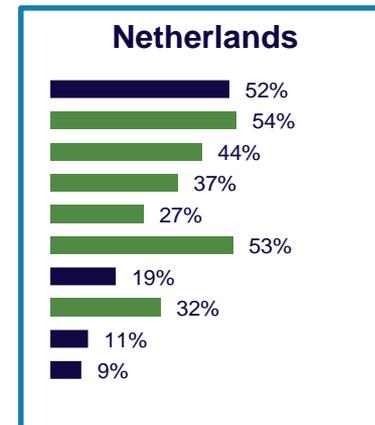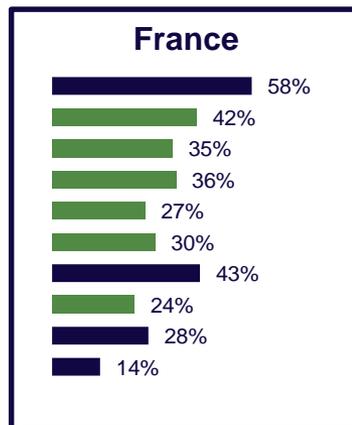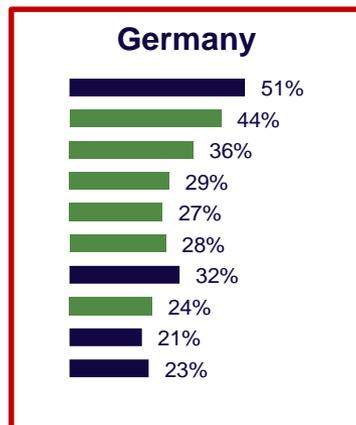
Making the booking: an online dominated process

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).

	Booked separately	Booked together
Netherlands	50	46
Germany	57	42
France	60	37

Transport
% Booked Online: 87 82 94

7% 7% 85%

	France	Germany	Netherlands
Travel agent	18	20	13
Direct	82	80	87

Accommodation
% Booked Online: 71 72 72

8% 8% 82%

	France	Germany	Netherlands
Travel agent	32	37	41
Direct accom	68	63	59
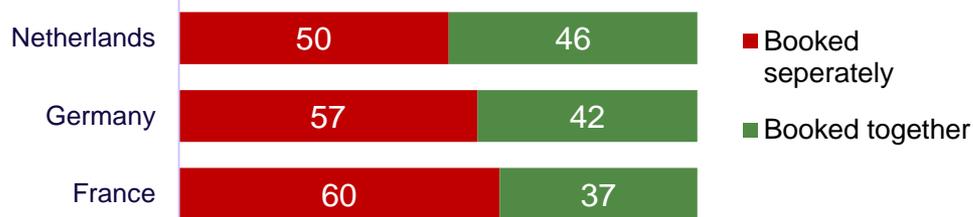
Package (Travel & Accommodation)
% Booked Online: 78 58 81

15% 10% 74%

	France	Germany	Netherlands
Travel agent	50	71	51
Direct transport	28	9	35
Direct accom	22	20	14
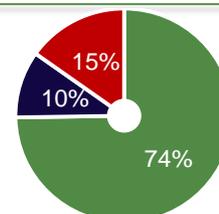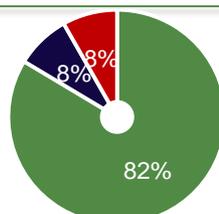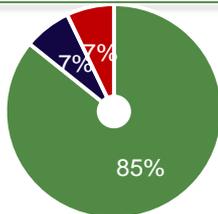
Legend: Direct with travel / transport provider; Direct with accommodation provider; Through a travel agent / tour operator / comparison website

Source: VisitBritain Researching and Planning Research, 2016

51
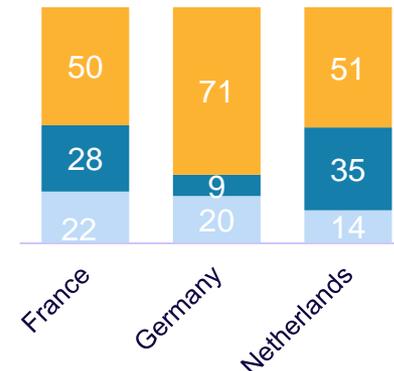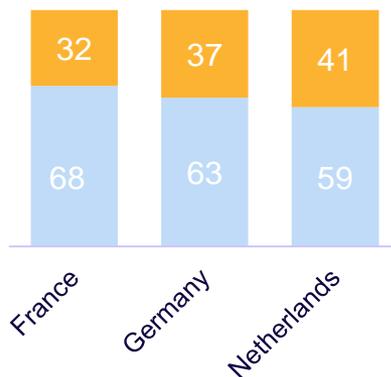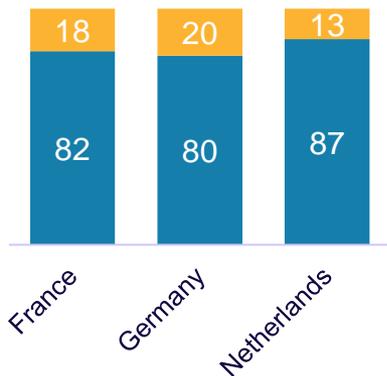
The Travel Trade Landscape

Top ten operators in the Netherlands in 2014

Top Ten Tour Operators	Turnover €m	Pax
TUI Nederland	1,115	1,542,000
Thomas Cook Nederland	420	790,000
Sundio Group	346	550,000
Corendon	345	618,000
Travelbird	334	unknown
@Leisure	246	618,000
ANWB Reizen Groep	190	235,000
Vacansoleil	98.5	unknown
De Jong Intra Vakanties	72	168,000
Alltours	68	75,000

Major tour operators with a Britain programme

Top ten operators in France in 2015/16

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

Source: Echo Touristique

Major tour operators with a Britain programme

Top ten operators in Germany in 2015/16

Top Ten Tour Operators	Turnover €m	Pax
TUI Deutschland	4.400,0	6.000,000
Thomas Cook Group	3.500,0	6.100,000
DER Touristik	2.800,0	5.400,000
FTI Group	2.210,0	3.900,000
Aida Cruises	1.500,0	908,000
Alltours Flugreisen	1.330,0	1.620,000
Schauinsland Reisen	1.100,0	1.370,000
TUI Cruises	821,0	413,752
Phoenix Reisen	327,2	154,058
Hapag-Lloyd Kreuzfahrten	296,7	28,898

Source: fvw Dossier, Deutsche Veranstalter 2016, 23rd December 2016

Major tour operators with a Britain programme

Owned by DER Touristik

Owned by TUI Deutschland   Partly owned by Thomas Cook

52

Source: VisitBritain Market and Trade profiles

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

Motivator	Visitors	Considerers
Cultural attractions	42	47
Variety of places	25	29
Somewhere new	23	28
Countryside & natural beauty	22	31
Easy to get around	22	21
Vibrant cities	22	19
Possibility to visit friends and family	22	12
Speak English	22	18
Ease of getting to the UK	21	20
Different culture	19	20
Mix of old and new	19	20
Good deals	18	32
Sampling local food and drink	18	24
Security / safety	17	22
Accommodation variety and quality	16	21
Cost of destination	12	27

■ Visitors ■ Considerers

- 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.

	Top 3 Motivators	Potential Barriers*
France	• Cultural attractions (46%) • Ease of getting to the UK (44%) • Variety of places / good deal (33%)	• Cost of destination (12ppt lower) • Security / Safety (12ppt lower)
Germany	• Cultural attractions (49%) • Variety of places (41%) • Countryside / natural beauty (38%)	• Cost of destination (9ppt lower) • Security / Safety (8ppt lower)
Netherlands	• Cultural attractions (44%) • Countryside / natural beauty (36%) • Vibrant cities (31%)	• Security / Safety (13ppt lower than avg) • Ease of getting around (10ppt lower)

* 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

Pre-bookable transport / activities

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

	Spontaneous	Plan carefully
France	56	65
Germany	38	68
Netherlands	53	28

■ I like to be spontaneous on holiday and decide some of my itinerary at the last minute

■ I like to plan my holiday carefully before I leave

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

■ Pre Booked prior to trip ■ Booked during trip

54

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**.

	Outdoor Enthusiasts	Mature Experience seekers
Profile	35-55 years Families/Empty nesters ABC1	50-65 years Empty nesters/(semi) retired
Key Markets	Germany, France, Spain	Australia, Germany, France, Spain
Defining attitudes & traits	Active, nature lovers, cycling, curious, off-the-beaten-track	Young at heart – new found freedom, keen to learn, see new places
Key interests	Walking, hiking, cycling, time close to nature	Healthy & active, time outdoors, walking/hiking, engaging with nature
Travel preferences	Beyond 'sunshine countries, activity driven & value scenery, a sense of discovery	Active, cultured holidays with plenty of sightseeing
Holiday activities	Enjoying natural landscapes, getting close to nature, learning about culture/heritage/food, seeing the sights, meeting people	Time outdoors – walking, learning about local heritage & culture, trying a new activity, learning a new skill, sampling local food
Accommodation preferences	Not mainstream hotel chains Independent hotels, B&B, camping Quirky, close to nature	Accommodation with character

- 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

■ France ■ Germany ■ Netherlands

Adventurers: France 22%, Germany 14%, Netherlands 20%
Explorers: France 22%, Germany 38%, Netherlands 34%

Source: VisitBritain Segmentation, 2017

56
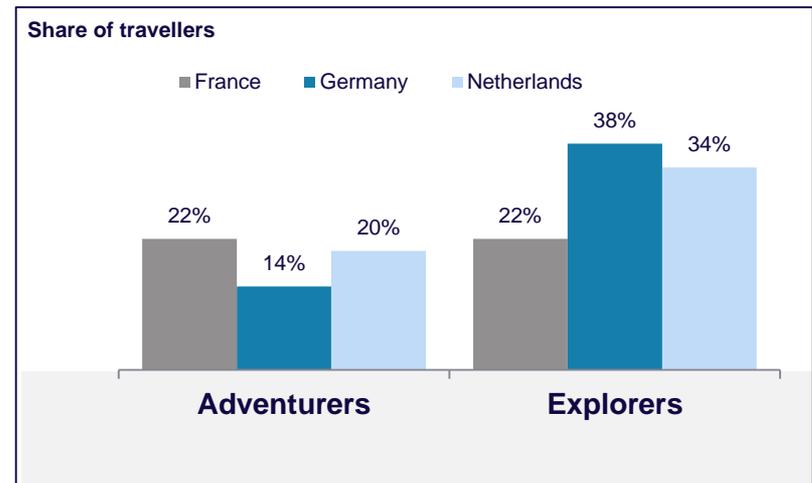
Segment Targeting Summary – two core segments, but opportunity to also reach Culture Buffs and Sightseers

	Explorers	Adventurers	Culture Buffs	Sightseers	Buzzseekers
	• 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	• Local food & drink • Famous/iconic places • Experiencing city life	• Famous/iconic places • Local food & drink • Challenge/action filled • Hands on learning
	• 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	• Friends & family • Websites & travel agents • Deal-seekers	• Friends & family • Trusted influential • 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

57

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.

59

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.

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.

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.

CULTURE BUFFS

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

KEY MARKETS
- China

GENDER
- 57% Female

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

FAVOURITE TRAVEL ACTIVITIES
- Experiencing local food & drink
- Visiting famous/iconic places

UNIQUE TRAVEL ACTIVITIES (versus other segments)
- World class food and drink
- Theme parks, zoos, day outings

GB LIKELY ACCOMMODATION (unique vs others segments)
- Mainstream hotels and bed and breakfast

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

WHO ARE THEY?

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

BUZZSEEKERS

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

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

GENDER
- 56% Male

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

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

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

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

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

WHO ARE THEY?

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

Links to data sources

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