

Discover England Fund Research Summary Report

The Urban Collective and Renaissance Collection

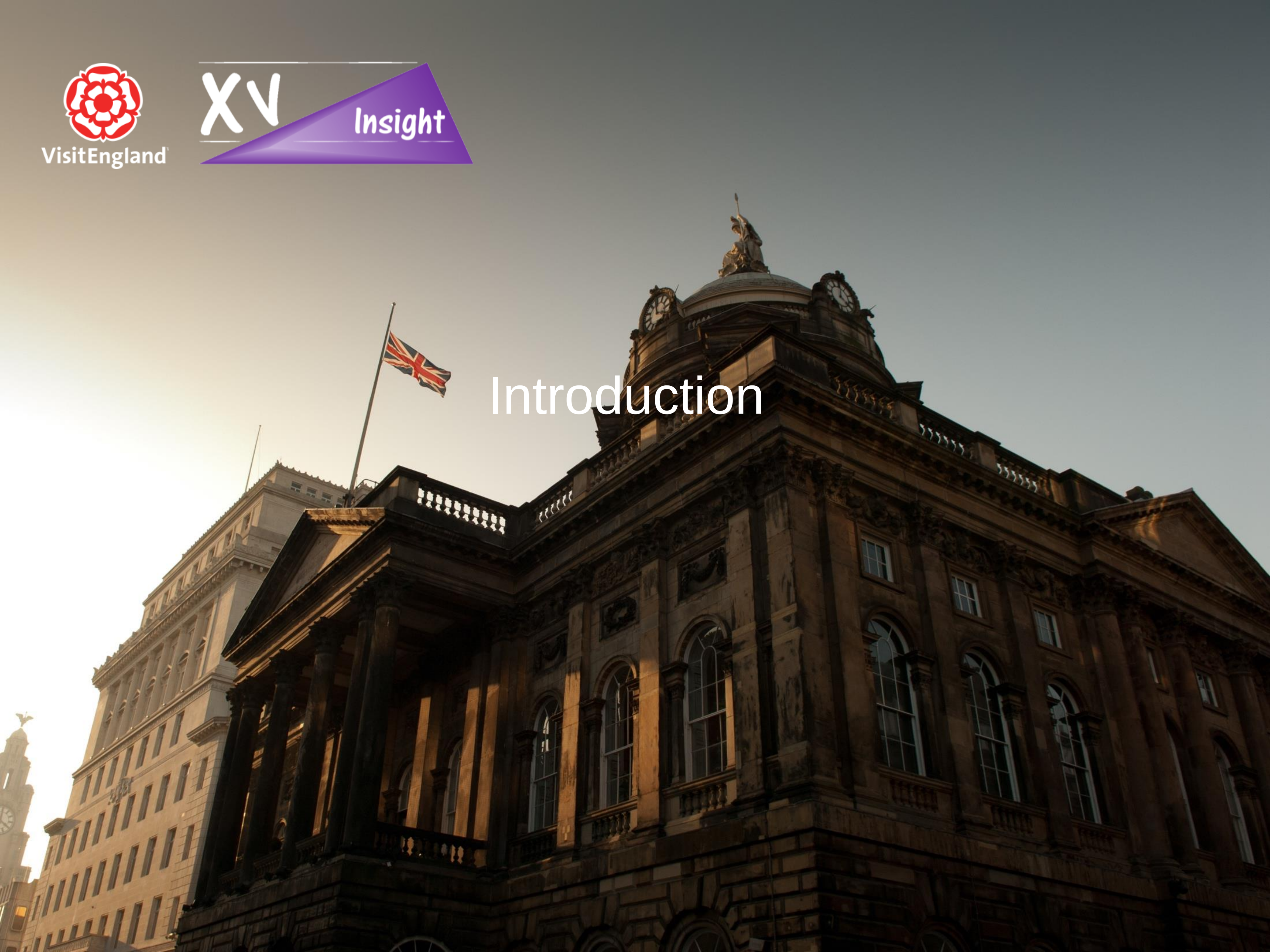
February 2018


Contents

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

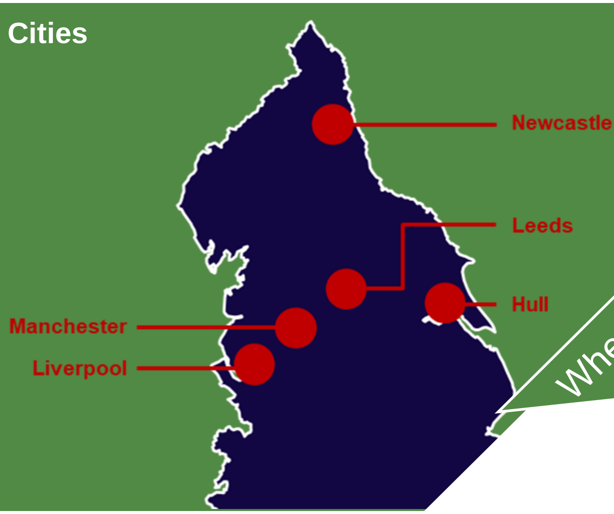
Note 1: Sources are short-referenced on each page. Full details of data sources including links where appropriate are in included in the appendix.
Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.

Introduction



Project overview

Cities



Where?

What?

"Vision • We have created genuinely exciting insight-led propositions and will now develop new audience-relevant culturally rich city-led bookable/commissionable products for Cultural Adventurers and Young Active Explorers in near markets. "

"Mission • We will educate the industry in each city and establish and embed a framework, guidance and process, which will create new international-audience relevant bookable product at local level."

The Urban Collective & Renaissance Collection

Who?

The Urban Collective
The next big thing in exhilarating travel – an Instagram-ready portfolio of cutting edge modern cultural experiences, set within the regenerating heartbeat of historic English northern cities.

Target

- Young Active Explorers
- 20 – 35 years
- Travelling without children
- Target countries: Nordics, Germany*

**This segment in Netherlands is also a potential target for this concept and so is included in the analysis throughout*

Why?

The Cultural Renaissance Collection:
The cultural adventure you deserve – a collection of rich experiences that enable you to witness and soak up the heritage, history, regeneration and transformation of England's northern cities.

Target

- Cultural Adventurers
- 25 – 50 years
- Travelling without children
- Target countries: Germany, Netherlands, Nordics

Source: Urban Collective and Renaissance Collection Business Plan

Project proposition and areas of focus in this report

Proposition

- Two brand-new ‘collections’ enabling us to develop and create, curate and present new culturally led internationally attractive, bookable and commissionable products across Newcastle, Hull, Leeds, Manchester and Liverpool.

Areas of Focus for this Report

- The project team have used research sources extensively in developing their bid. This report therefore focuses on specific questions and subgroup analysis:
  - Where possible we explore attitudes, preferences and behaviours of the core target audiences (segments and age groups within each of Netherlands, Germany and the Nordics).
  - How does the Urban Collective & Renaissance Collection connect with people? What communication channels are used?
  - Itinerary building – what elements are important to build appealing itineraries?
  - What should be communicated? What messages will resonate?
  - What accommodation is required?

This report includes data from multiple sources. The coverage of Nordic markets varies across these sources and analysis is therefore based on available markets. In some instances it is only Norway, in others it extends to Sweden, Finland, Denmark as well.

The Urban Collective. Live in the moment. Frame it with history. No filter required

England’s Cultural Renaissance Collection. Enriching Urban travel

Example Itinerary: The Urban Collective

This illustrative itinerary has been used as context for the analysis in this report.

Day 1 - Newcastle:
Flight Stavanger-Newcastle direct
Evening: dinner at Wylam Brewery

Day 2 - Newcastle:
Day: Exhibition at the Baltic, tour & tea, explore the retail scene
Evening: dinner at Blackfriars restaurant, gig at the Boiler Shop

Day 3 – Train to Hull
Lunch in Old Town, visit Humber Street Gallery/Ferens Art Gallery
Evening: dinner at Butler Whites, visit Fruit Space for gig/entertainment

Day 4 – Train to Leeds
Lunch at Leeds Corn Exchange or Kirkgate Market, festival at Canal Mills
Evening: dinner at Zaap Thai, entertainment at Belgrave Music Hall

Day 5 – Train to Manchester
Lunch at the Northern Quarter, performance at the Hope Mill Theatre
Evening: entertainment at Albert Hall

Day 6 – Train to Liverpool
Lunch at Bold Street, shopping, The Bluecoat, Tate Liverpool
Evening: dinner and entertainment at the Baltic Triangle and Ropewalks

Day 7 – Travel to Liverpool John Lennon Airport or train to Newcastle Airport

The itineraries encourage pre-booking of attractions/ venues and use of public transport to travel between the airport/cities.
The target market is assumed to be independent travellers who are able to make their own bookings and relish the challenge/experience of travelling by train.

Note – travel to Newcastle airport from Liverpool takes approx. 4 hours.

Example Itinerary: The Renaissance Collection

This illustrative itinerary has been used as context for the analysis in this report.

Day 1 - Newcastle:
Day: Flight Berlin/Düsseldorf/Amsterdam-Newcastle direct, explore the retail scene
Evening: dinner at Bridge Tavern

Day 2 - Newcastle:
Day: Victoria tunnel tour, lunch at House of Tides, afternoon at the Biscuit Factory
Evening: Tyneside Cinema

Day 3 – Train to Hull
Lunch at Kardomah94, visit Humber Street Gallery/Ferens Art Gallery/Old Town
Evening: dinner at 1884 Dock Street Kitchen or Butler Whites, then Hull Truck Theatre

Day 4 – Train to Leeds
Lunch at Granary Wharf, afternoon show at the City Varieties Music Hall
Evening: dinner at The Man Behind The Curtain, cocktails at East 59th/Angelica

Day 5 – Train to Manchester
Lunch at Deansgate Locks, afternoon at The Quays
Evening: at The Royal Exchange

Day 6 – Train to Liverpool
Lunch at Oh Me Oh My, afternoon at Bold Street, The Bluecoat, Tate Liverpool
Evening: dinner at 60 Hope Street then Philharmonic Hall

Day 7 – Travel to Liverpool John Lennon Airport, train to Newcastle Airport or Hull for ferry/flight to Amsterdam / Düsseldorf

The itineraries encourage pre-booking of attractions/ venues and use of public transport to travel between the airport/cities.
The target market is assumed to be independent travellers who are able to make their own bookings and relish the challenge/experience of travelling by train.

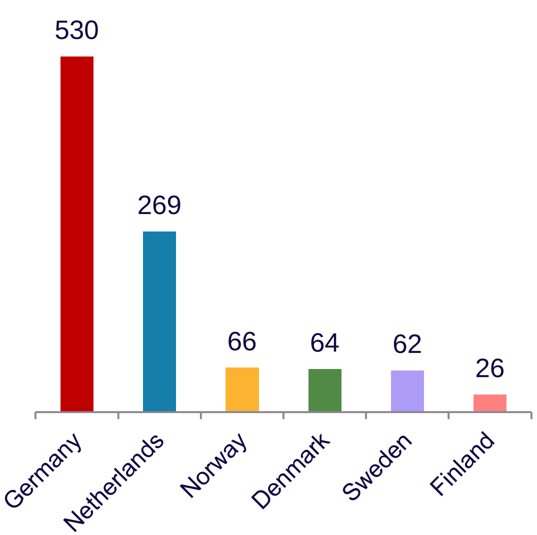
Note – travel to Newcastle airport from Liverpool takes approx. 4 hours.

Current Trends

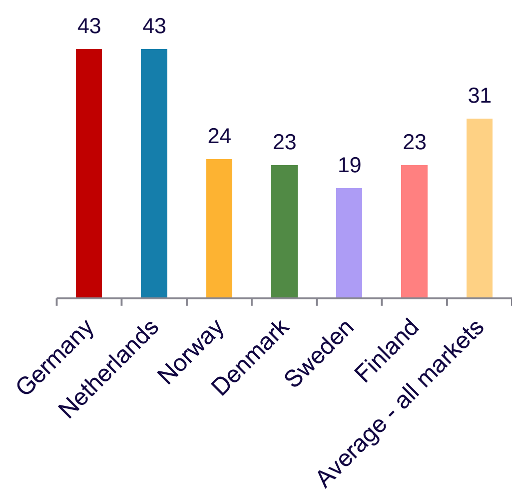
Current Inbound Travel Trends to England (outside of London)

- Almost half of visitors from Germany and Netherlands travel beyond London on holiday, well above the average for all inbound tourists. In contrast less than a quarter of visitors from the Nordics currently holiday outside of London, suggesting the messaging for the two regions may need to differ.

2016 Holiday Visits (in 000's) to England (Outside London)



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



- All the target countries have strong outbound tourist travel, providing good opportunities for growth through relevant and targeted communications.

Country	% of 15 years+ population – outbound holiday travellers*	Average Number of holiday trips (domestic & outbound 2015)*
Germany	53%	3.9
Netherlands	59%	3.4
Denmark	58%	8.0
Norway	72%	n/a
Sweden	55%	5.3
Finland	61%	8.2

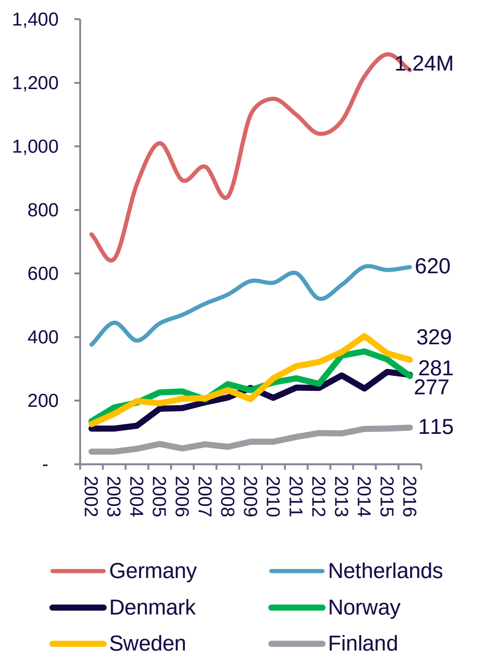
- Norway has the highest share of holiday travellers.
- The number of trips taken is highest among those from Denmark and Finland.

Source: IPS 2016, *http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics_-_participation_in_tourism

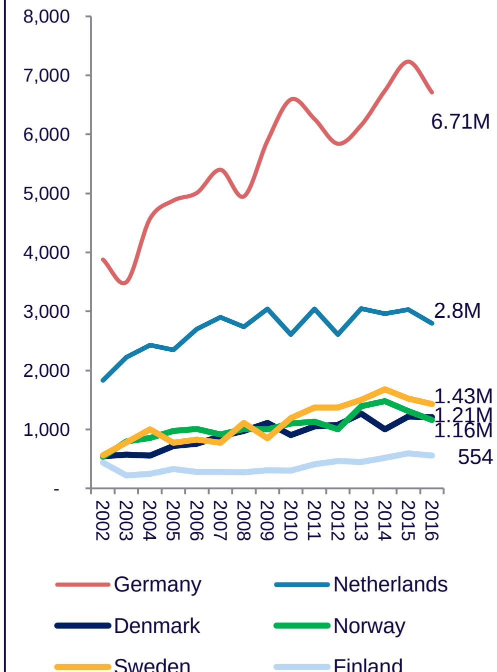
Current Inbound Travel Trends to England

- The general trend has been steady growth over the past 10+ years in visitor volumes from target markets. However 2016 saw a slowing of growth and in some countries a decline in volumes.

Holiday Visits (in 000's) to England



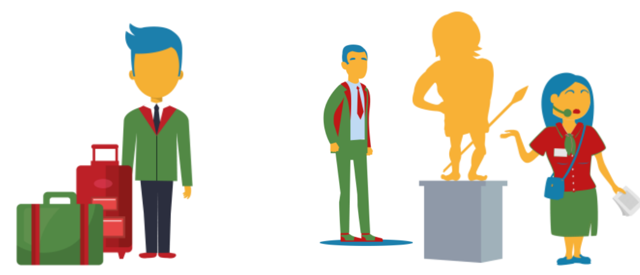
Holiday Nights (in 000's) to England



- The provisional data for Q3 2017 shows that the target markets are returning to stronger growth

Country	Visits (000's)	Growth	Spend (£m)	Growth
Germany	1,037	↑ 4%	£553	↑ 4%
Netherlands	585	↑ 10%	£242	↑ 18%
Denmark	178	↑ 3%	£96	↑ 30%
Norway	171	↑ 22%	£87	↑ 1%
Sweden	211	↑ 6%	£118	↓ 1%

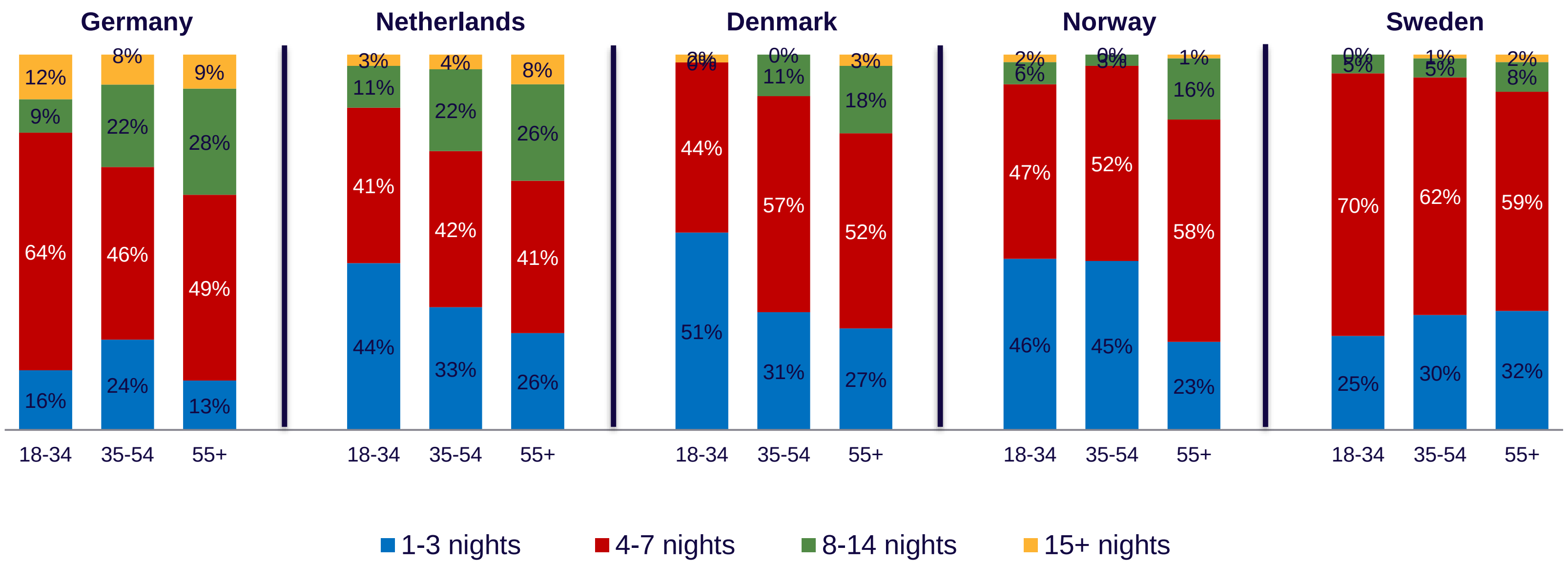
- Data shown is based on provisional IPS figures comparing Q3 2017 with Q3 2016.



Source: IPS 2002-2017

Many visitors stay less than a week, which may have implications for the length of itineraries developed

- The younger age group in Denmark and Norway tend to stay for only 1-3 nights. In all markets the majority of 18-34 year olds are staying a week or less, which could have implications on the optimum Urban Collective itinerary length.
- Among 35-54 year olds we typically see a third of visitors staying only 1-3 nights (less in Germany and more in Norway) and around half staying 4-7 nights. This again suggests an opportunity for shorter itinerary options for the Renaissance Collection also.



Consideration:
Whilst some visitors may be persuaded to stay a little longer, promotion of 7 day itineraries may fail to attract this audience. Messaging that starts from short (2-4 night itineraries) that can be extended to 6-7 nights may resonate with a wider audience.

Source: VisitBritain Decisions & Influences Research, 2016

Two challenges for the project team: 1. Encouraging more visitors to the North and 2. Encouraging visitors to stay longer

Inbound visits to England's regions

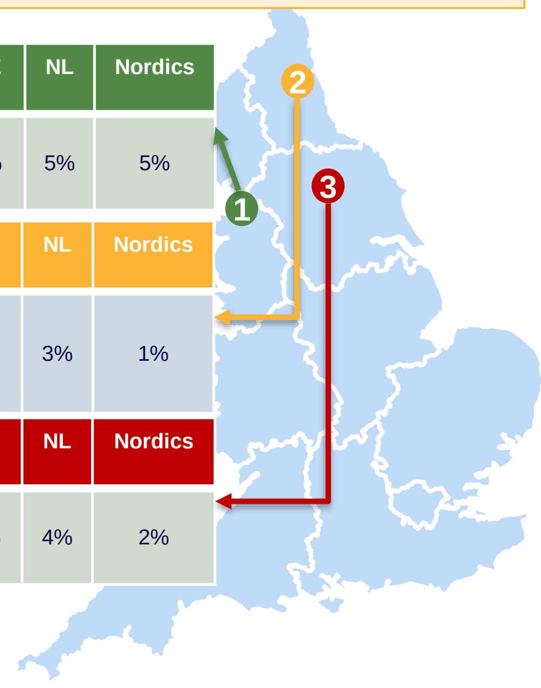
Implications:

- The primary challenge is to get visitors to the North. Currently the South has the highest share of visitors.
- The North will require strong communications and a differentiated product to encourage visits.

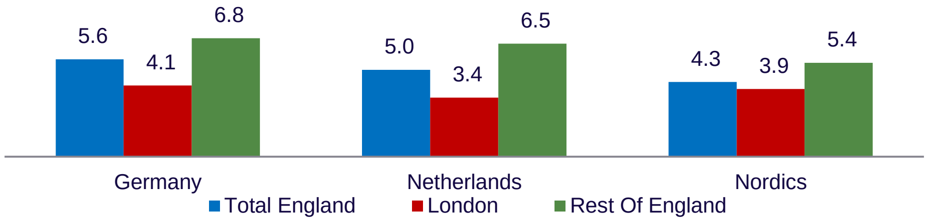
IPS 2013-2015	DE	NL	Nordics
% of inbound visitors visiting **North West**	5%	5%	5%

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

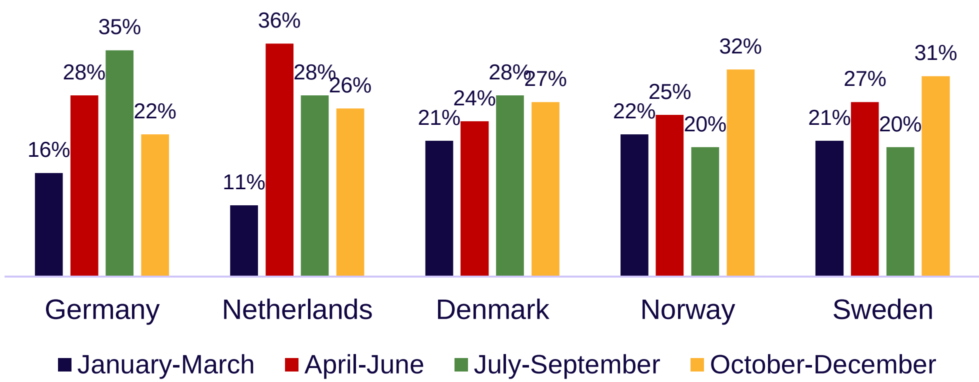
IPS 2013-2015	DE	NL	Nordics
% of inbound visitors visiting **Yorkshire**	3%	4%	2%



Average number of nights stayed in England (2015)



Seasonality of holiday visits to England by market 2016

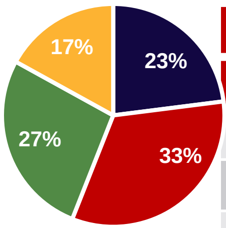


Visitors from Norway, Denmark and Sweden have a more even spread across the seasons than the other target markets, suggesting an opportunity to extend well into the shoulder season and even offer winter holidays.

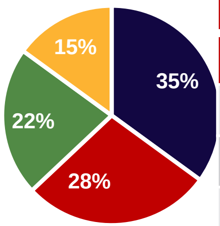
All data is based on holiday visits

Source: IPS 2013-2016

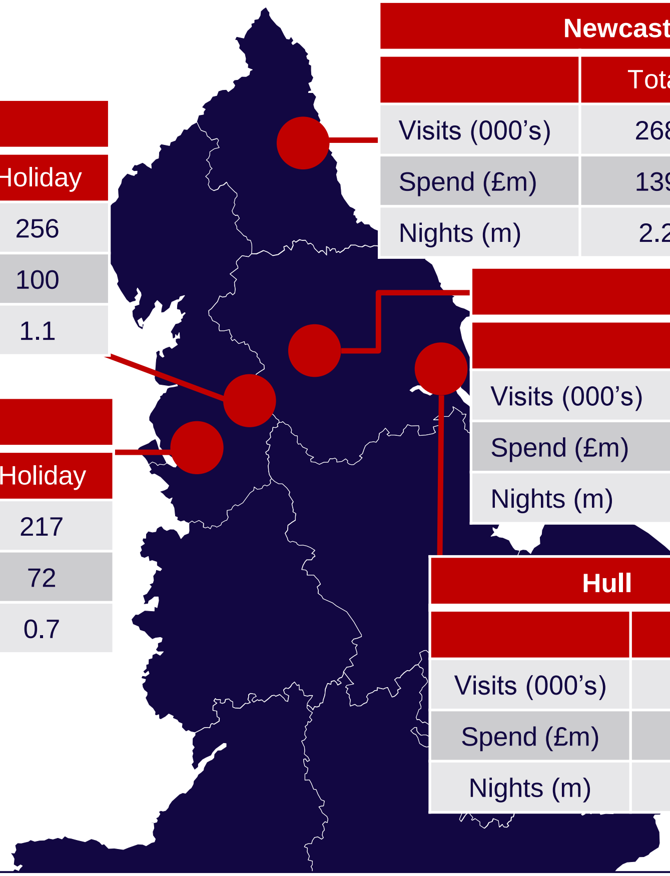
Visitor volumes vary across the 5 cities and holidays typically account for under a third of visits



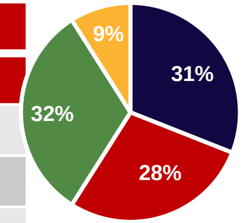
Manchester	Total	Holiday
Visits (000's)	1,112	256
Spend (£m)	467	100
Nights (m)	7.1	1.1



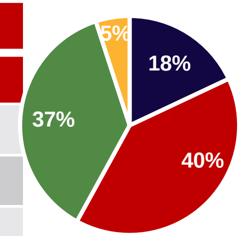
Liverpool	Total	Holiday
Visits (000's)	625	217
Spend (£m)	249	72
Nights (m)	3.1	0.7



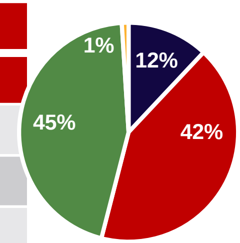
Newcastle	Total	Holiday
Visits (000's)	268	84
Spend (£m)	139	32
Nights (m)	2.2	0.4



Leeds	Total	Holiday
Visits (000's)	334	59
Spend (£m)	134	30
Nights (m)	2.3	0.5



Hull	Total
Visits (000's)	79
Spend (£m)	23
Nights (m)	0.7



■ Holiday ■ Business
■ VRF ■ Other

Visitors from the Nordics account for 8-9% of all holiday visitors to each of Manchester, Liverpool and Leeds. Germany has a lower number of visitors to these cities and Netherlands is even lower at only 3%.
Manchester and Leeds currently attract a higher percentage of people visiting for business or to see family/friends. Liverpool has the highest number of holiday visits, but is still lower than the UK average.
The challenge will be to educate the target markets about the possibilities of these up-and-coming cities and grow the visitor numbers.

Sample size too small to report holiday-only activity in Hull

Source: IPS 2014-2016

City of Culture Legacy Benefits

Liverpool European Capital of Culture 2008

Whilst the European title is perhaps ‘bigger’ than the domestic title, the benefits Liverpool have seen may be indicative of what Hull can expect.

Benefits

- Attracted additional 9.7m visits in 2008, growth of 34% on the previous year.
- 5% of visitors were international.
- 50% increase in visitor figures to Merseyside’s seven largest attractions.
- Increased interest in going to museums.
- Positive impact on image and perceptions reflected in media coverage.

Hull City of Culture 2017

The City of Culture status should drive awareness of Hull as a destination.
Legacy projects and funding will make many destinations accessible to the Urban Collective & Renaissance Collection project.

- Investment during 2017 will have had positive impact on many attractions and experiences across Hull.
- The 107 venues cover a broad spectrum from major landmarks such as the Humber Bridge though to small art galleries and exhibitions.

Source: https://www.liverpool.ac.uk/media/livacuk/impacts08/pdf/pdf/Creating_an_Impact_-_web.pdf

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

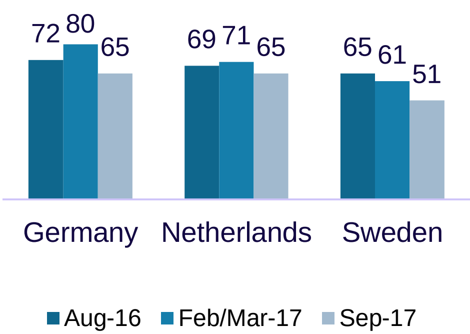
Geopolitics: Safety / Security

"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.

Britain: Safe & Secure destination (%)

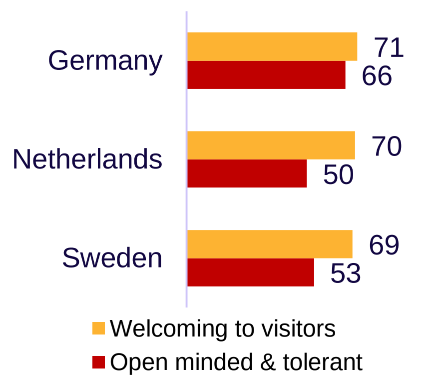


Perceptions of Britain

Potential impact both positive and negative:

- Some sense of 'they don't want us' from other European countries.
- May increase competitiveness of Ireland (& Scotland).
- But also, reinforces the nationalist, island mentality which can translate to quirky, real England.
- People say they are more likely to visit Britain post-referendum.

Perceptions of Britain (%)

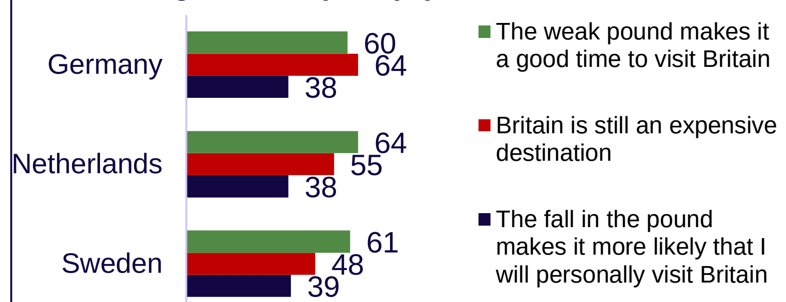


Exchange Rate

- Initial movement post-Brexit vote made England an attractive inbound destination.
- However it is notable that the exchange rate has now returned to 2013 levels in the EuroZone.
- The movement has not been so dramatic in the Nordics, though the exchange rate still remains positive for travellers to England.

£ exchange rate	2013 mid-year	2015 peak	Jan 2018
Euro	1.15	1.4	1.15
Norwegian Krone	8.5	12.1	11
Swedish Krone	10	13.5	11
Danish Krone	8.5	10.5	8.5

Exchange Rate Impact (%)



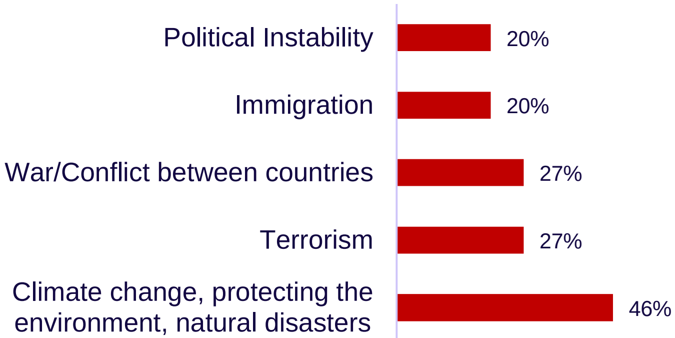
Source: Inbound consumer sentiment research. Note: Sweden was the only Nordic market included in the research

Millennials are a core target for The Urban Collective and trends in this sector suggest a good fit

The 18-35 year olds are widely demonstrated to be a generation that is more interested in **experiences** than objects. Those experiences should be **personalised**, with **instant everywhere** attitudes and expectations enabled by technology.

Millennials in the Nordics

- Whilst they have a less materialistic focus, 51% of Nordic Millennials expect to be better off than their parents and 29% expect to be happier
- However this positive outlook is tempered by more immediate concerns: Nordic Millennials are less optimistic than their counterparts elsewhere:
  % who expect the overall social/political situation in their country to improve (next 12 months):
  20% Nordics
  25% Western Europe
  36% Global
- Whilst the single largest concern is the environment, other important issues tend to revolve around politics and security:



- Nordic Millennials also crave security with 71% preferring full-time employment (Global 65%) than freelance/consulting roles 20% (Global 31%)

German Millennials

- Take slightly more holidays than younger counterparts and are more likely to book online (DE 49% - Global 40%)

"I always check product reviews before buying something." (DE 78%/ Global 71%)

"I like to get input from other people when making decisions." (DE 73%/ Global 57%)

"I am willing to pay more for luxury brands." (DE 71%/ Global 57%)

Most popular holiday types among Millennials	Holiday Types over-indexed compared to other generations
Beach	Holidays with several destinations
City trips	City Trips
Relaxation holiday with sightseeing	Winter Sport

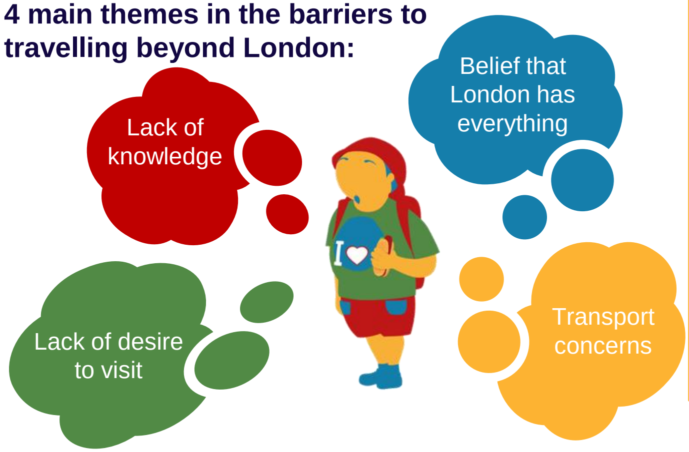
Trade Brands more considered by Millennials	Trade Brands less considered by Millennials
Airbnb Swoodoo.com Holiday Check	TUI Neckermann Berge & Meer Meier's ADAC

"To me it is important to achieve a high professional position." (DE 63%/ Global 43%)

Sources: Deloitte Millennials Survey: https://www2.deloitte.com/content/dam/Deloitte/se/Documents/human-capital/Deloitte-Millennials-2017-The-Nordics.pdf (Norway, Sweden, Denmark, Finland), YouGov Millennials Travel Survey https://d25d2506sfb94s.cloudfront.net/r/48/Tourism%20Millennials.pdf (Germany)

Visitors to England are not aware of the attractions outside of London

4 main themes in the barriers to travelling beyond London:



Implications

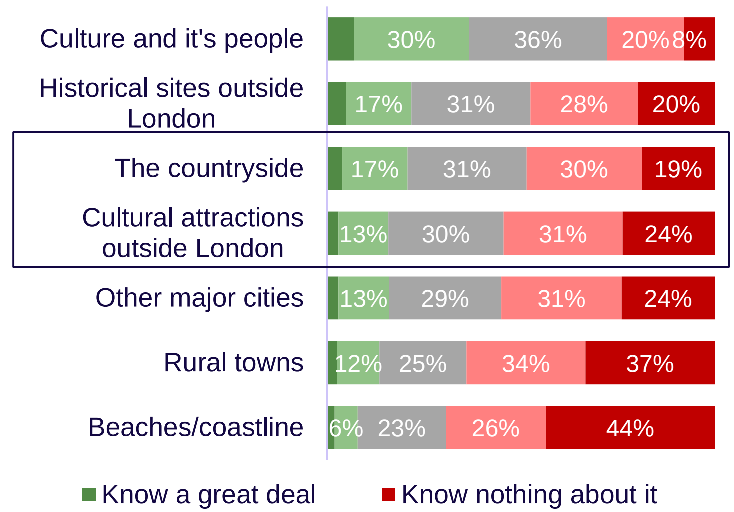
- Almost all these barriers can be addressed through strong communication of the offer beyond London. The destinations in the Urban Collective/Renaissance Collection are strong contenders to London once people know about them. They have the added advantage of being 'unusual', a bonus for the target segments.
- The nervousness of driving coupled with the apparent confidence in public transport implies train-based travel will appeal.

The level of knowledge is low for attractions and destinations beyond London.

The greater perceived knowledge of the culture and people is interesting – the itineraries for this project are designed to immerse visitors into British contemporary culture, so experiencing the culture is a good message for communications.

Nervous of driving in UK	Norway 50% Germany 40%
Public Transport is too bad to travel outside of London	Norway 4% Germany 5%

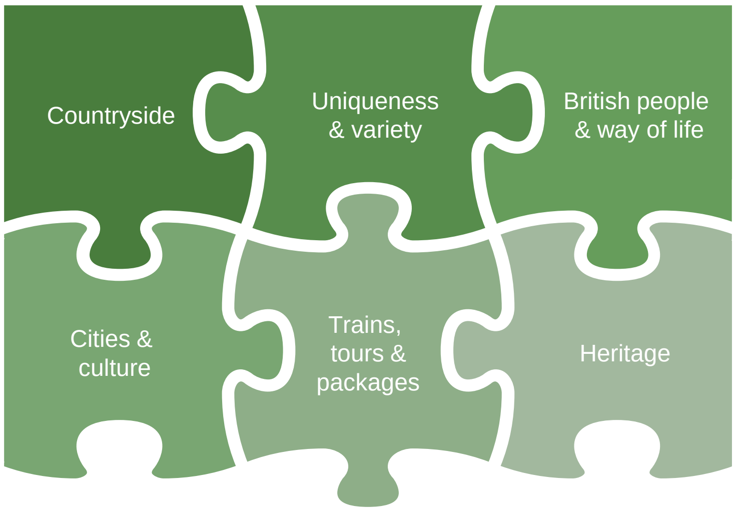
What do you know about Britain outside of London?



Source: VisitBritain Beyond London, 2013

The triggers to travel beyond London tie in well with themes included within the Urban Collective/Renaissance Collection

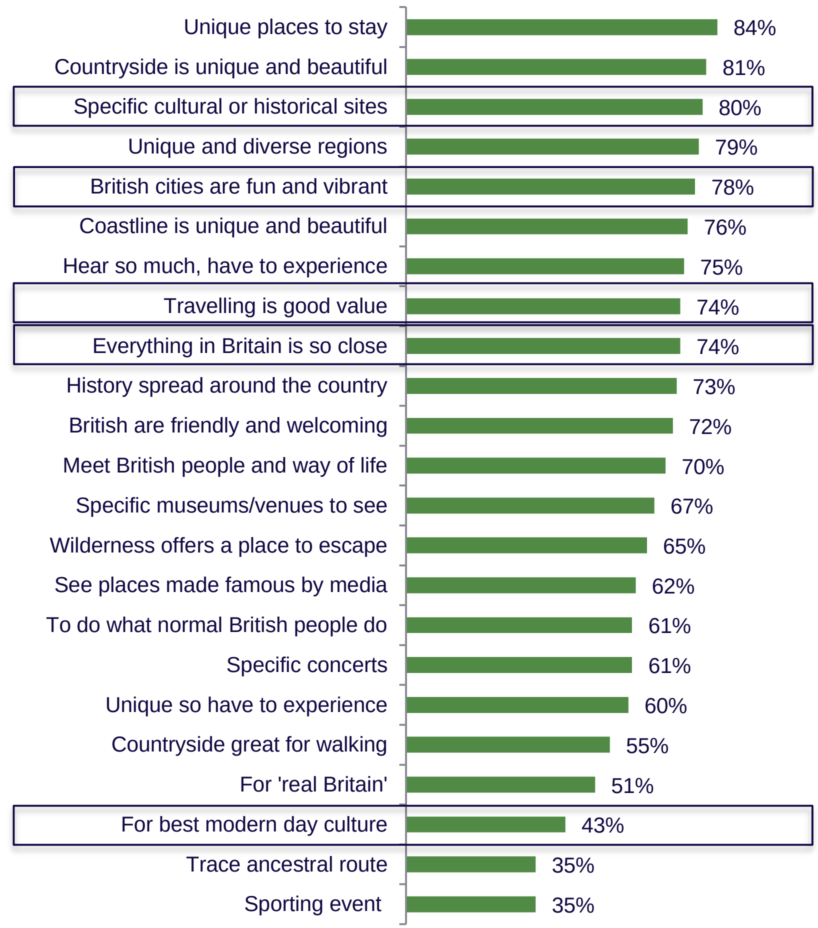
Triggers to go beyond London



Implications

- The combination of the vibrant cities, cultural and historical attractions will draw people away from London.
- The uniqueness of the region and the individual cities is a strong message to share with trade and with travellers.
- Itineraries capture almost all of the triggers for going beyond London.
- However, itineraries need to be tested in-market to ensure they deliver the widest appeal to the target segments.
- Communications could be developed using these reasons as a starting point.

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



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

Concept Testing

Urban Collective: The initial concept test was conducted only in Germany. The concept is understood and well-received

England's new Urban experiences

"I love taking city breaks around Europe and look for places that have a real buzz about them. It's even better if it's somewhere that hasn't been 'discovered' yet – I feel like I'm setting the trend!

England's Urban Collective is the next big thing in exhilarating travel - an Instagram-ready portfolio of cutting edge modern cultural experiences, set within the regenerating heartbeat of historic English northern cities.

Immerse yourself in the best these cities have to offer, including street and contemporary art, music, fashion, nightlife and food & drink, whilst witnessing the transformation of these bold and historic Northern cities. Visit Hull's 'Museum of Club Culture', situated in the heart of the Old Town and former port, and Manchester's Affleck's Palace. Experience Leeds' Tetley Contemporary Art gallery, set in a former brewery, Newcastle's Baltic 39 art scene, and Tracey Emin's neon installation in Liverpool's Anglican Cathedral. You can experience multiple cities with one easy-to-buy, flexible rail ticket and we'll give you all the tips to avoid the mainstream 'tourist traps'. Smartphone mandatory!"

The Urban Collective Live in the moment. Frame it with history. No filter required.

Source: DEF Concept Testing 2017

Concept testing – Germany only

Positive take-outs
Uniqueness
Excitement
Culture
History
Fun
Allows me to visit places that I couldn't previously
Easy to get around

The great program at many activities, sights and above all shopping possibilities..

That I can visit by train several places without having to buy a new ticket every time.

That you can visit several rather more unknown cities

The informal - the cultural as well as culinary offer -…. Excursion destinations for every need in the city and outside the city (means of transport incl.) Super

Possible **booking channels**: Online travel agent, specialist travel agent (in-line or in-store)

Watch-outs
Relevance
Believable
Appeal

Smartphone compulsory

Too much urban life, I miss the rest in nature

Apart from the fact that I do not know how the accommodations would be regulated and how expensive it is, the idea of having to spend a long time with arrivals and train rides.

Implications

- Without diluting the core offer it may be relevant to consider optional excursions to accessible rural destinations e.g. North York Moors or Peak District on route between cities

Note: Given the difference seen in holiday expectations and behaviours across Germany Netherlands and the Nordic markets it will be important to test the concept content and positioning in the other markets to ensure optimal positioning.

VisitEngland XV Insight

The Cultural Renaissance Collection: The initial concept test was conducted only in Germany. The concept is understood and well-received

England's Cultural Renaissance Collection

"I love taking city breaks around Europe and look for new places where I can soak up all aspects of local culture and atmosphere. It's even better if it is somewhere a bit different that I don't know much about.

England's Cultural Renaissance Collection is the cultural adventure you deserve - a collection of rich experiences that enable you to witness & soak up the heritage, history, regeneration and transformation of England's northern cities.

Set across such historic cities as Liverpool, Manchester, Leeds, Newcastle and Hull, the Cultural Renaissance Collection is an 'Instagram-ready' portfolio of rich cultural experiences, presented against the backdrop of each city's dynamic, sophisticated post-industrial regeneration. Visit Manchester's Refuge restaurant, situated at the former Palace Hotel, Newcastle's Ouseburn Biscuit Factory arts centre and Hull's Museums Quarter. See Liverpool's Rum and Tobacco dockside warehouses, now the 5 Star Titanic Hotel, Albert Docks & Tate, and the Victorian shopping arcades in Leeds' Victoria Quarter, housing Harvey Nichols and high end boutiques. Each experience offers unique insights into the city's history, heritage and transformation. You can visit multiple cities at your own pace with one easy to buy, flexible rail ticket, and we'll give you all the tips to make your visit as luxurious as possible."

England's Cultural Renaissance Collection. Enriching Urban Travel

Concept testing – Germany only

Positive take-outs
Culture
History
Easy to get around

You can dive deeper into cultural sights and experience more than, for instance, from a tourist guide

I have the opportunity to visit many large cities of England on a holiday

The historical background of these cities and the atmosphere

Watch-outs
Uniqueness
Believable
Fun

Too little nature; Too little interesting historical objects

too much stress

Just visiting cities and visiting many expensive shops is not for me

This is certainly very expensive and only suitable for wealthy people.

Implications
- This concept seems to have less unique appeal with the positives being quite generic
- The concerns raised suggest that the communication of the concept needs to be carefully managed, both to avoid perceptions of being too expensive and to ensure it resonates with the target audience.

Note: Given the difference seen in holiday expectations and behaviours across Germany Netherlands and the Nordic markets it will be important to test the concept content and positioning in the other markets to ensure optimal positioning.

Source: DEF Concept Testing 2017


Current Visitor Behaviour
Transport
Why visit Britain?
Accommodation
Food & Drink

Transport

Journey times and routes need to be carefully planned to minimise the impact on the holiday

Gateways

- Whilst the focus is on Liverpool and Newcastle airports, Manchester also provides an option with a greater number of connections and seats.
- Hull and Newcastle offer ferry options for visitors from Netherlands Sea (for Netherlands)

Journey Times

- The journey times between cities range between and hour and over 3 hours. It will therefore be important to develop itineraries that provide the optimal routing between cities to keep journey times short and routes simple.

Road/ Train	Liverpool	Newcastle	Hull	Leeds
Newcastle	3h 15m/ 3hr 30m		Alternative routes by road: Hull to Newcastle – 'scenic route' via North York Moors Manchester – Hull – could detour via the Peak District	
Hull	2h 25m/ 3h 30m	2h 30m/ 2h 15m		
Leeds	1h 45m/ 1h 30m	1h 50m/ 1h 30m	1h 15m/ 55m	
Manchester	1h/ 30m	2h 40m/ 2h 30m	1hr 55m/ 1h 55m	1h/ 50m

Open Jaw vs Circular Routes

- Open Jaw options reduce travel time in England, but should start and finish at the same airport in the source country. Travellers are generally unlikely to wish to start a holiday from one airport in their home country and return into another, particularly if they are far apart.

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.**
- **Nervousness of left-hand-drive.**
- **Rail concerns** (prices, train quality & comfort, gaps in geographic coverage).

While these views may not be reflected 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.

Source: DEF Travel Trade Research June 2017

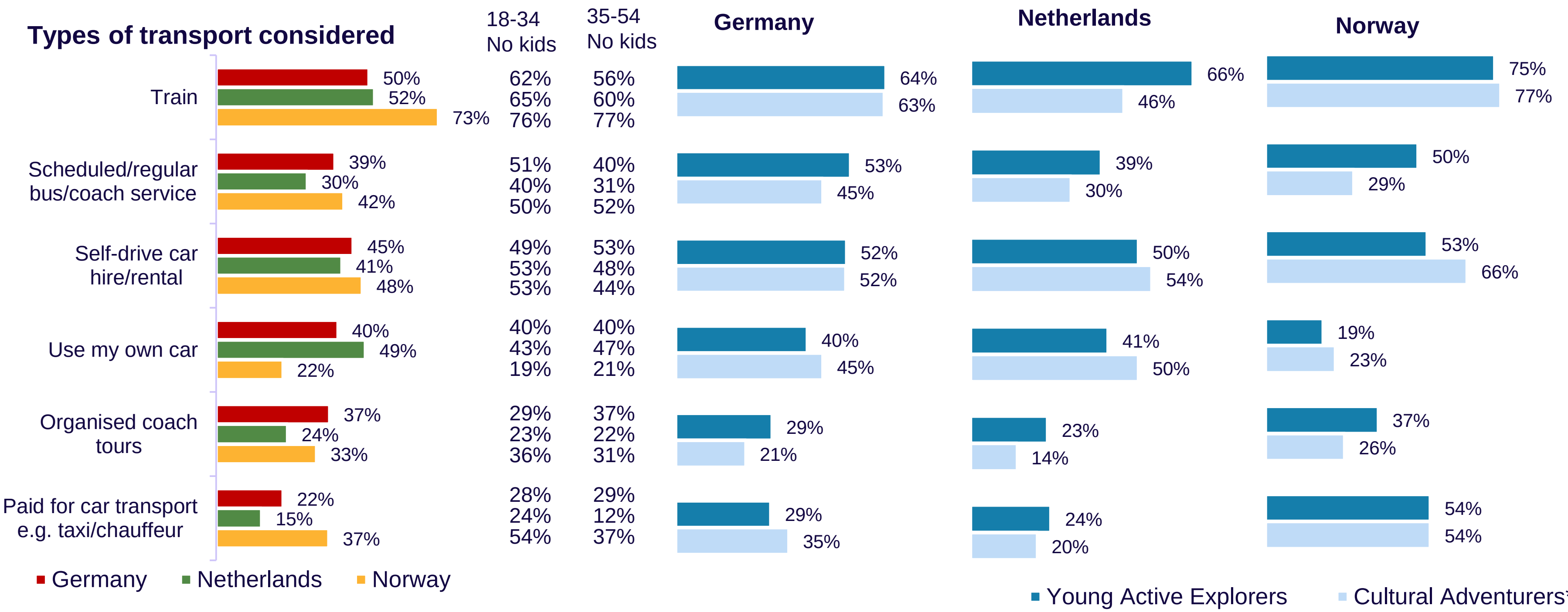
The cultural rover ticket (currently available but excludes Newcastle) will need to be clear and accessible to both travel trade and travellers booking independently. Purchase and travel information should be available in all key languages.
There are limitations at present on travel times – the ticket does not allow for travel before 9.30am and therefore restricts the amount of time spent in the next city, especially when travelling from Newcastle to Hull.

International Examples:

- At **Zurich** railway station, all information, including timetables, is available in four languages.
- **Lisbon** uses a system of contactless smartcards to link trains, buses and tram services.
- Larger hotels in **Amsterdam** have display screens showing live departure times and platform numbers at the city’s main railway station.

BritRail
As part of a Discover England Fund project, the BritRail England M-Pass covering stations in England was launched in April 2017. This will change the paper ticket to a smartphone or tablet QR code and will improve the overall user experience. Already in the first quarter (April 17 – June 17) 35% of BritRail England consecutive passes are M-Passes.

Consideration of public transport is high across the target age groups and segments



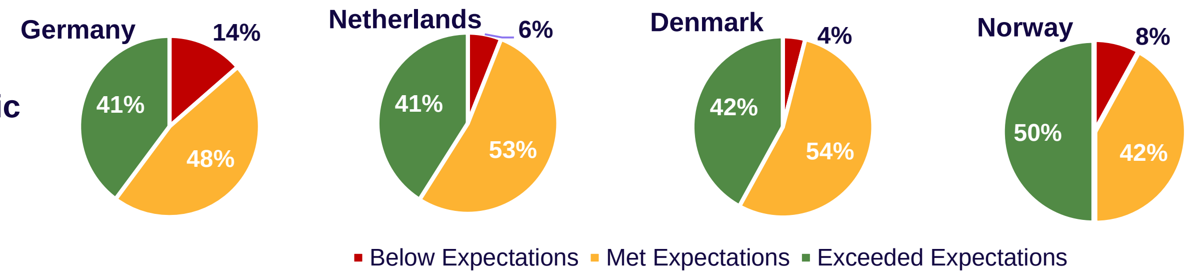
- Train travel is widely accepted, particularly among travellers from Norway and Young Active Explorers in Netherlands.
- Cultural Adventurers from the Netherlands appear more likely to want to be ‘in control’ of their transport – preferring their own car or car hire to train. It may be that a self-drive option could be provided, though whether these people would be confident driving in city centres is not known.
- The Norwegians in particular, and target segments in each country, are interested in taxi/chauffeur services. It may be an option to include some journeys in the itinerary by road rather than rail e.g. airport transfers and/or city to city transfers.

* Cultural Adventures base size is low, figures should be treated with some caution

Source: DEF Themes and Activities Research 2017

Most visitors reported that public transport either met or exceeded their expectations. Under 35's are more likely to pre-book transport before their trip.

Ease of using public transport



No data for Sweden

- For the vast majority of visitors from the target countries, their experience of public transport in Britain at least meets, and for many exceeds, expectations.
- However, there is a minority who are left disappointed by their train experience, particularly from Germany.
- Clear communication of transport arrangements will be needed both before and during the trip.

Transport booked before or during trip

Pre Booked prior to trip (%) / Booked during trip (%)

		Germany	Netherlands	Denmark	Norway	Sweden
Train Travel (within the UK)	Total	18 / 27	12 / 26	12 / 20	14 / 28	10 / 30
	Under 35's	26 / 35	19 / 20	9 / 22	11 / 38	18 / 39
Airport transfer	Total	30 / 20	14 / 20	30 / 32	14 / 26	25 / 38
	Under 35's	38 / 21	19 / 20	31 / 44	11 / 32	23 / 43

Base: Past Visitors to Britain

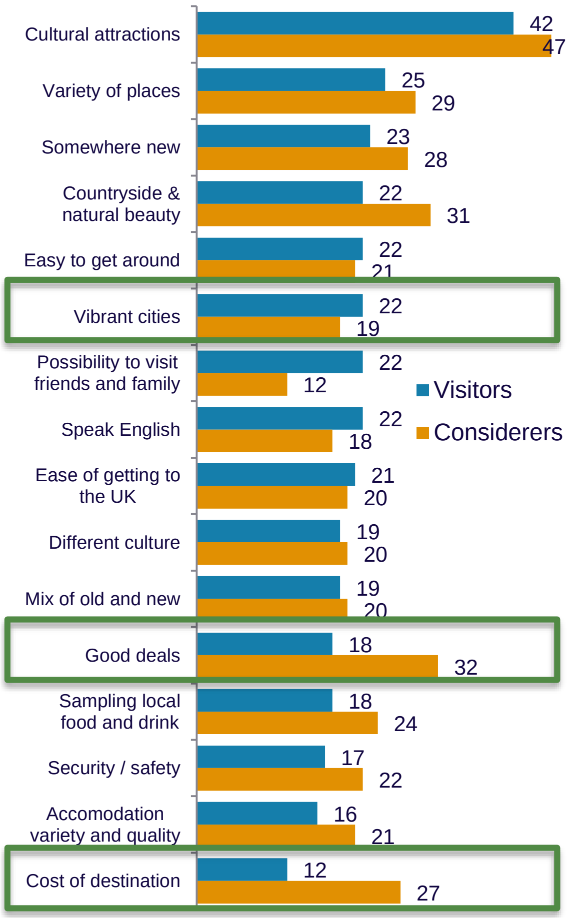
- Younger travellers from Nordic markets to Britain are most likely to book train travel during their trip rather than in advance.
- Including the train ticket within the package price should be seen as beneficial by most travellers who intend to use the train, particularly if it is an open ticket that allows travel at any time on any route within the region.

Source: CAA passenger study 2015, VisitBritain Decisions & Influences Research, 2016

Activities and Themes

Key Motivators to visit Britain demonstrate the core appeal of cultural attractions, but also vibrant cities and contemporary culture

Top Motivators to Visit Britain



- Cultural attractions drive the appeal of visiting Britain.
- Vibrant cities are important to visitors from Sweden, as is the contemporary culture; so perhaps the Urban Collective concept should lead for this audience .

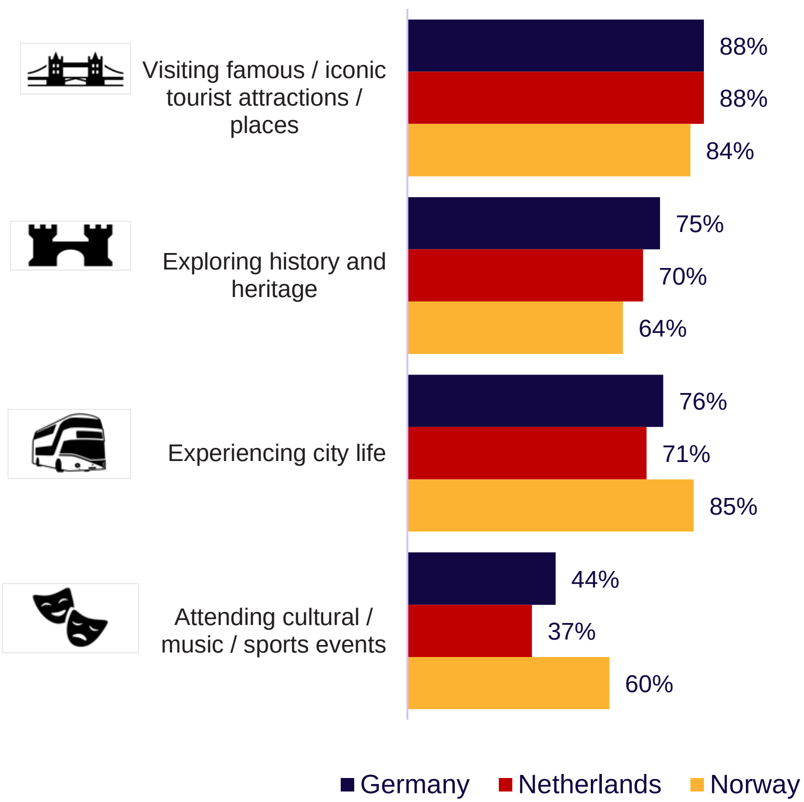
	Top 3 Motivators	Potential Barriers Biggest gaps to all country average for motivations
Germany	• Cultural attractions (49%) • Variety of places (41%) • Countryside / natural beauty (38%)	• Cost of destination (9ppt lower) • Security / Safety (8ppt lower)
Netherlands	• Cultural attractions (44%) • Countryside / natural beauty (36%) • Vibrant cities (31%)	• Security / Safety (13ppt lower) • Ease of getting around (10ppt lower)
Denmark	• Cultural attractions (58%) • Easy to get around (32%) • Countryside / natural beauty (31%)	• Wide variety of places to visit (13pt lower) • Security / safety (13pt lower)
Norway	• Cultural attractions (45%) • A good deal (32%) • Ease of getting to Britain (29%)	• A culture that's different from our own (13pt lower) • Wide variety of places to visit (9pt lower)
Sweden	• Cultural attractions (44%) • Vibrant cities (30%) • Contemporary culture (26%)	• A culture that's different from our own (12pt lower) • Security / safety (11pt lower)

- Only 19% of visitors from Sweden want to immerse themselves in the local culture. However from the data above it would seem that Swedes and Danes do not see the English Culture as particularly different. Therefore there may be an opportunity to promote some 'English' experiences into the itinerary.

Source: VisitBritain Researching and Planning Research, 2016

Activities and themes research gives direction on focus areas for potential itineraries that will have wide appeal

Relevant activity themes that would be important on a holiday to England



Germany
Limited differences between the segments. Cultural Adventurers are a little more engaged with both visiting famous/iconic places and exploring history and heritage

Netherlands
Differences between segments and age groups are not considerable. 35-54 year olds are less likely to attend events.

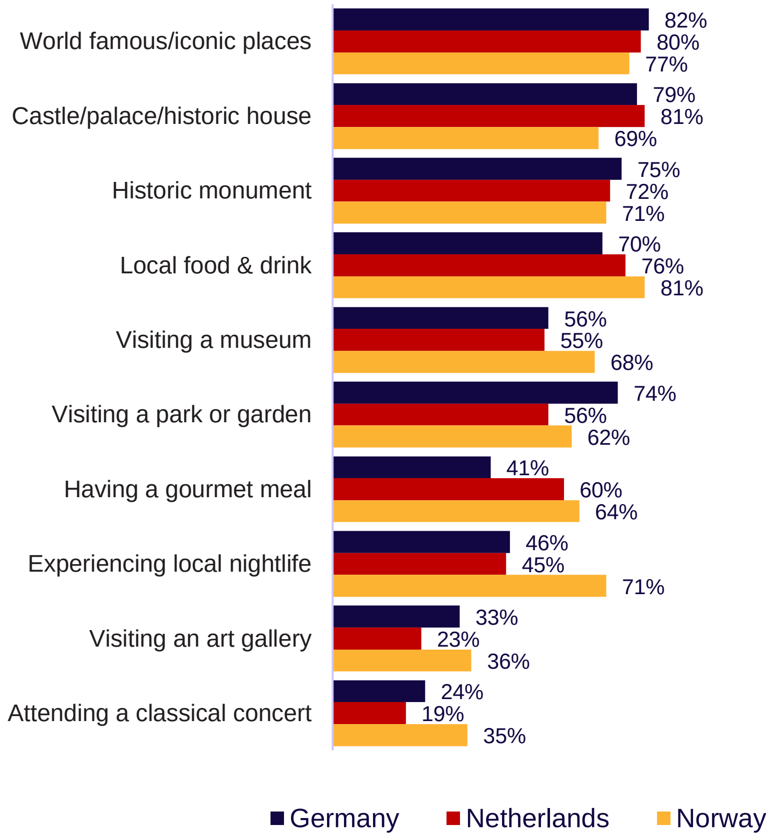
Norway
Overall the most interested country in city life and attending events.
Cultural Adventurers are more interested in:
- Exploring history & heritage
- Cultural/music/sports events

18-34 year olds are more interested in visiting famous/iconic tourist attractions and less in exploring history & heritage.

Source: DEF Activities & Themes March 2017

Experiences that are most considered reflect the interest in history and heritage as well as the culture

Activities that would be considered on a holiday to England
% would/very likely



Germany
History and heritage are the main areas of interest, though Germans are also keen to visit parks and gardens.

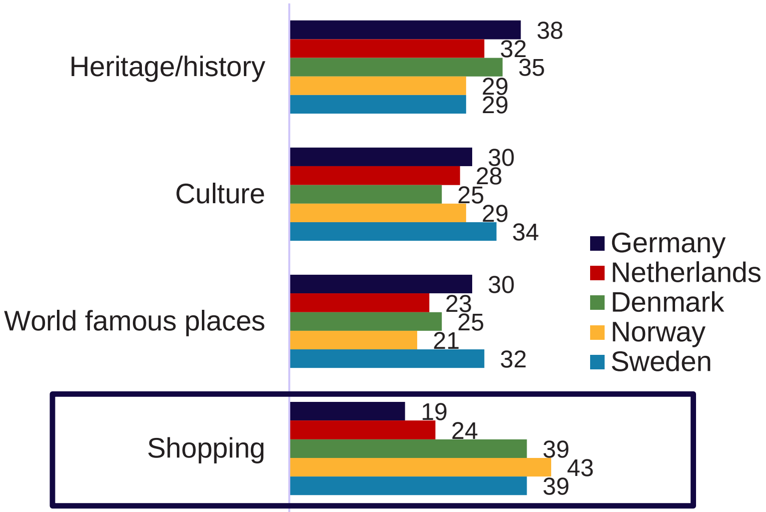
Netherlands
History and heritage are important, so the stories behind destinations and accommodation in the itinerary will be of interest. Gourmet food is also widely considered and can be promoted in the concept messaging.

Norway
Has the widest interests and notably Norwegians are more interested in local nightlife and eating and drinking out. These themes should be promoted in communications for Norway perhaps with a 'higher energy' perspective for the Urban Collective and more 'cultural' one for the Renaissance Collection.

Source: DEF Activities & Themes March 2017

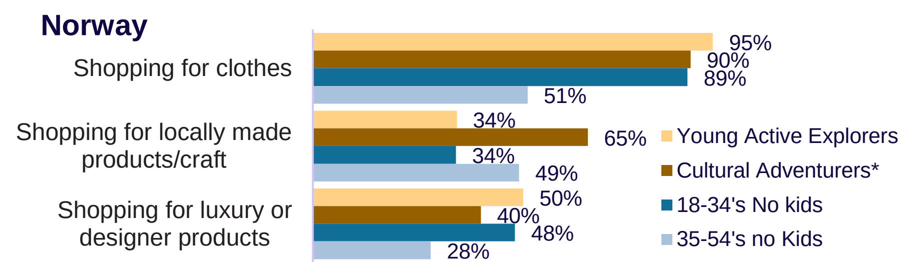
Shopping is an important part of a visit to England, particularly for those from the Nordics. Inclusion of suitable shopping destinations in itineraries should be explored

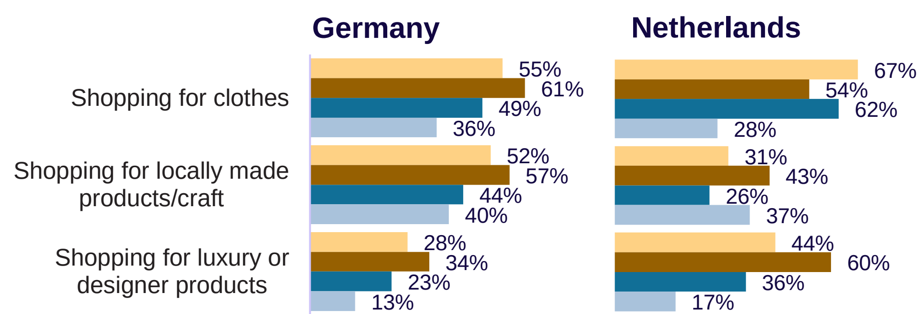
Top reasons for visiting Britain



- Shopping appears to be very important to visitors from the Nordics and influences the reason for visiting UK.
- Looking at activities that would be of interest among visitors and considerers from Norway we see that both target segments are most interested in clothes shopping. Those targeted by the Urban Collective are also interested in shopping for designer and luxury products.
- The Renaissance Collection target audience of Cultural Adventurers has a slightly greater interest in locally made products than younger travellers. Notably in **Netherlands** designer/luxury goods are particularly appealing

Activities considered on holiday in England

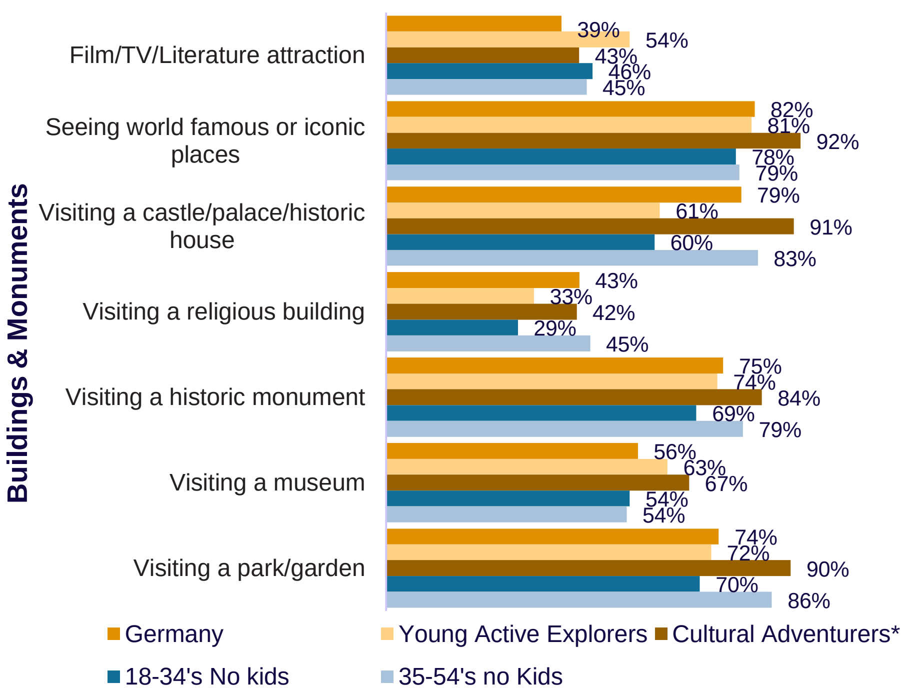


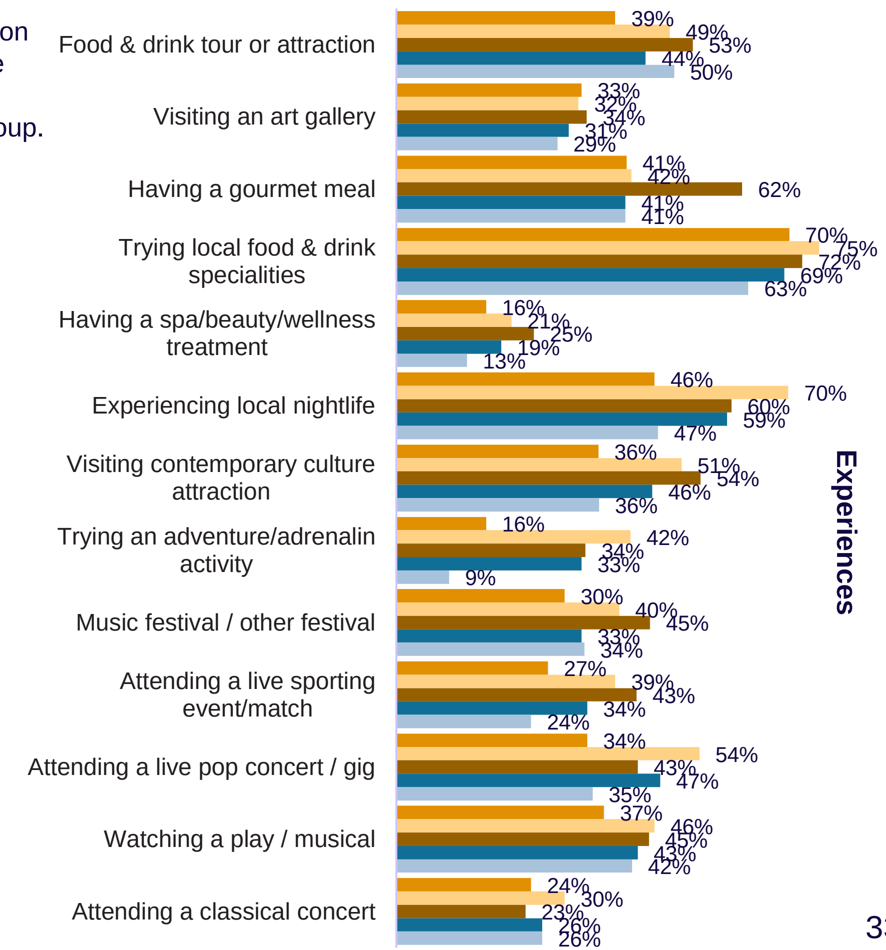


Source IPS 2015 – Why did you chose to visit the UK this time (all departing holiday visitors)
Activities and Themes detailed shopping interests

GERMANY: Cultural Adventures have a greater interest in historic sites, but both segments have a food & drink interest and a wish to experience nightlife

- For the Urban Collective the target is 20-35 year olds and Young Active Explorers. There is a general interest in historic sites and these are likely to be a core part of the itinerary, though castles and palaces have lower appeal for this younger audience.
- Nightlife and food & drink are important attractions for Young Active Explorers. Their interest in sports events, festivals and pop concerts may open an opportunity to include such events in itineraries when possible.
- Their interest in adventure/adrenalin activities may provide an opportunity to include activities such as combat archery, watersports, bubble football etc.
- The older and Cultural Adventurer target for the Renaissance Collection has a greater interest historic sites, castles and parks/gardens. These should be a core part of the itineraries.
- Local food, gourmet food and food attractions are important to this group.
- They are also interested in contemporary culture.



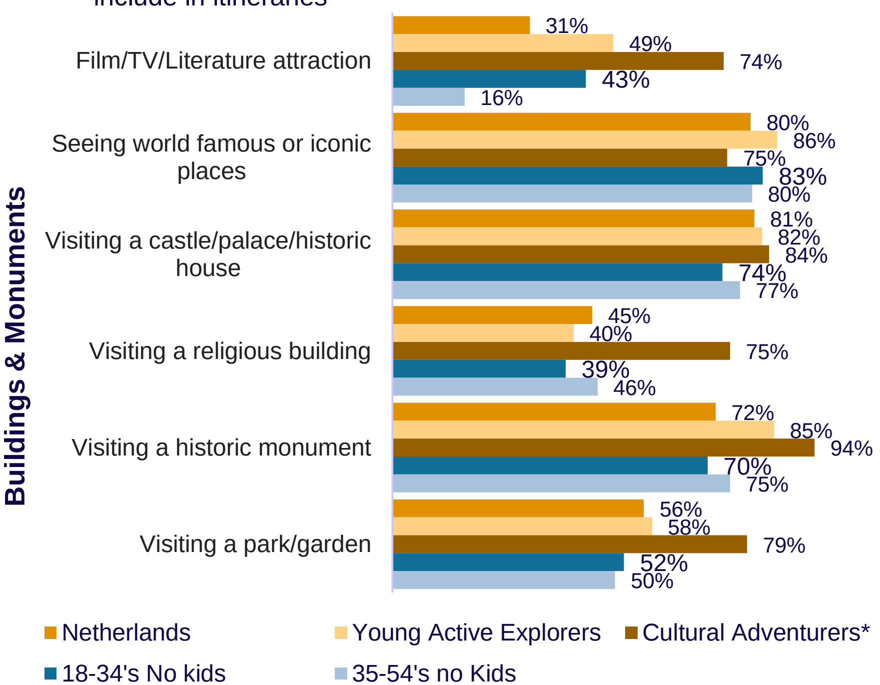


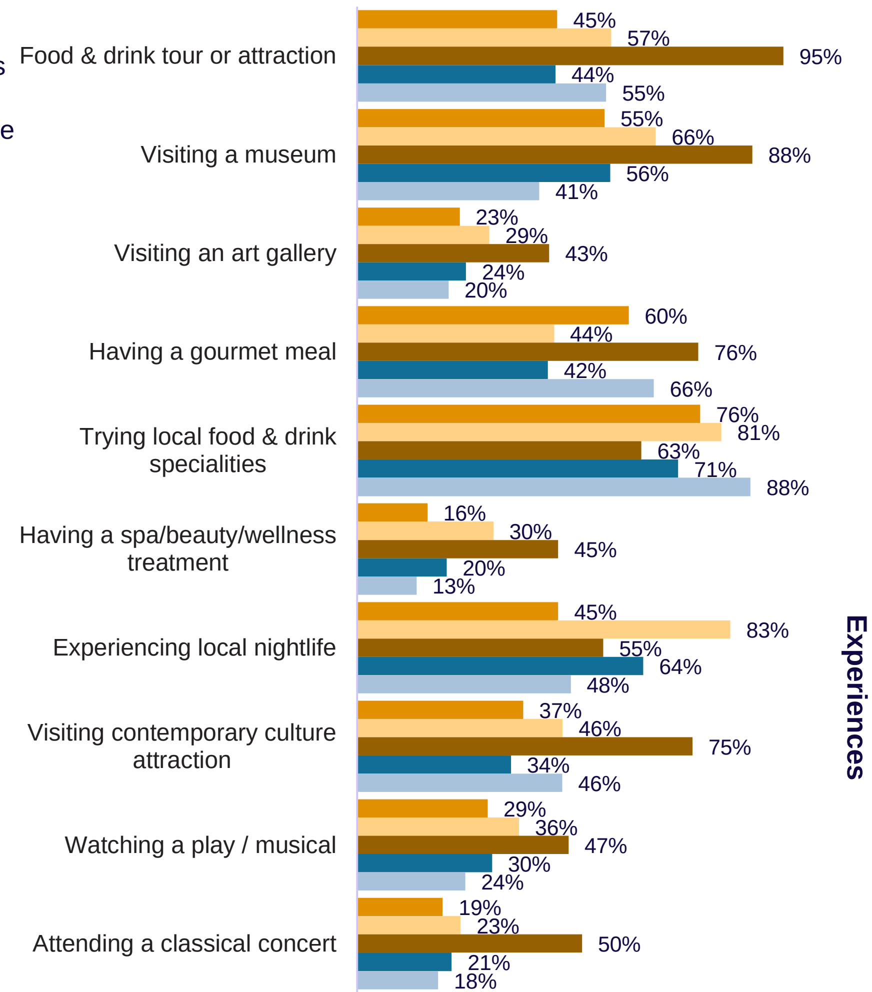
Source: DEF Activities & Themes Research, 2017

VisitEngland XV Insight

NETHERLANDS: A wide range of attractions and experiences appeal to the target audiences

- Cultural Adventurers are identified as the target audience for the Renaissance Collection.
- They have high interest in historic sites, film/literature connected attractions and parks/gardens. These destinations should form the core of itineraries.
- There are a number of experiences that will resonate well with this audience including:
  - Food & drink (attractions and gourmet meals).
  - Cultural Attractions (contemporary culture, museums, plays/musicals).
- An accommodation option with spa facilities may also appeal.
- For the Urban Collective, nightlife and local food are more important to include in itineraries



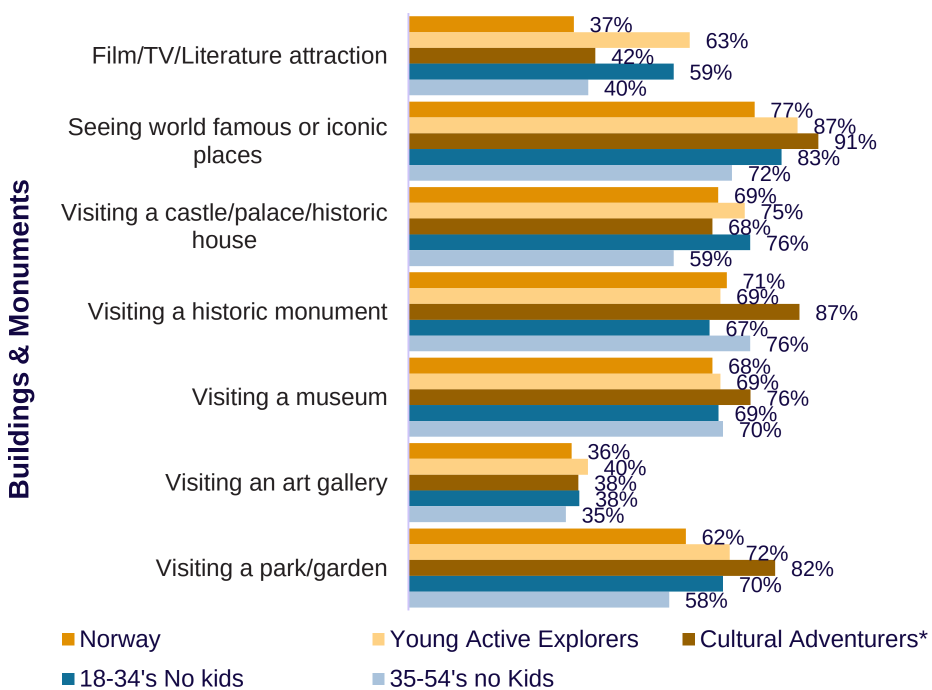


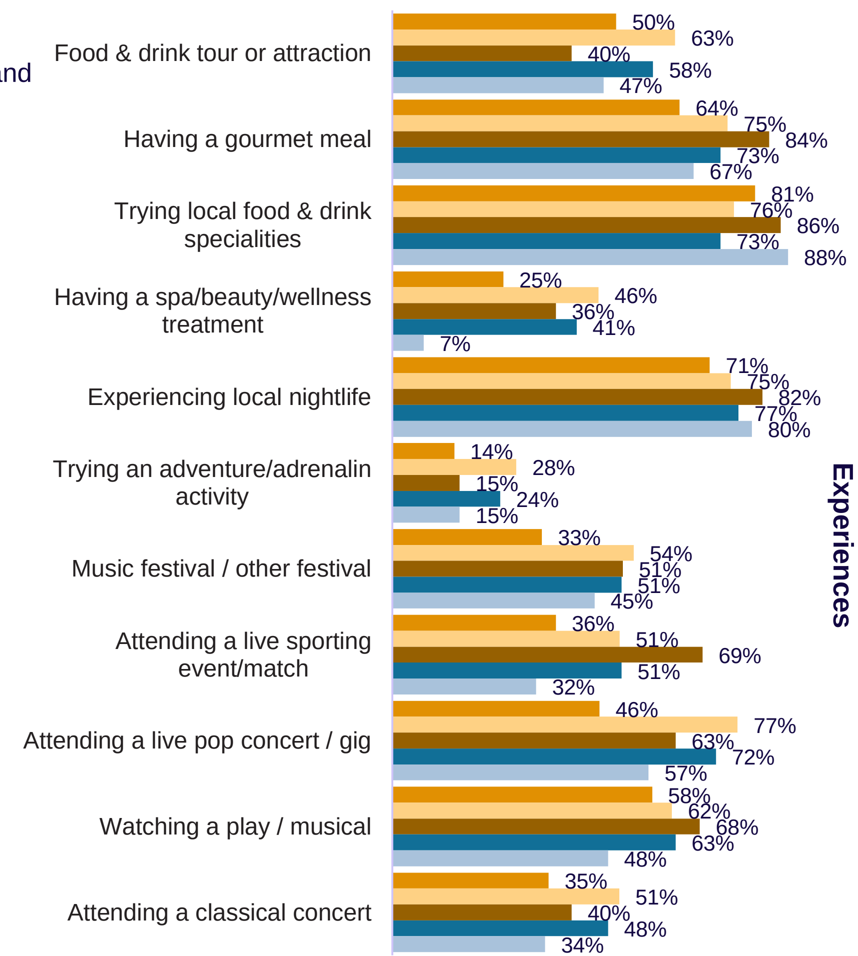
Source: DEF Activities & Themes Research, 2017

NORWAY: Interests are similar across the two target segments and so there is potential for the Urban Collective and Renaissance Collection concepts to appeal to wide audiences

- For the Urban Collective the target is 20-35 year olds and Young Active Explorers.
- There is a general interest in historic sites and these are likely to be a core part of the itinerary. Those that have film/literature connections will have heightened appeal to this younger audience.
- Nightlife and food & drink are important attractions for Young Active Explorers. Their interest in festivals and pop concerts may open an opportunity to include such events in itineraries when possible.

- The older and Cultural Adventurer target for the Renaissance Collection has a slightly greater interest in historic sites, museums and parks/gardens. These should be a core part of the itineraries.
- Gourmet and local food is important to this group as is the nightlife.
- There may be potential to tie itineraries to major sporting events staged in the region.





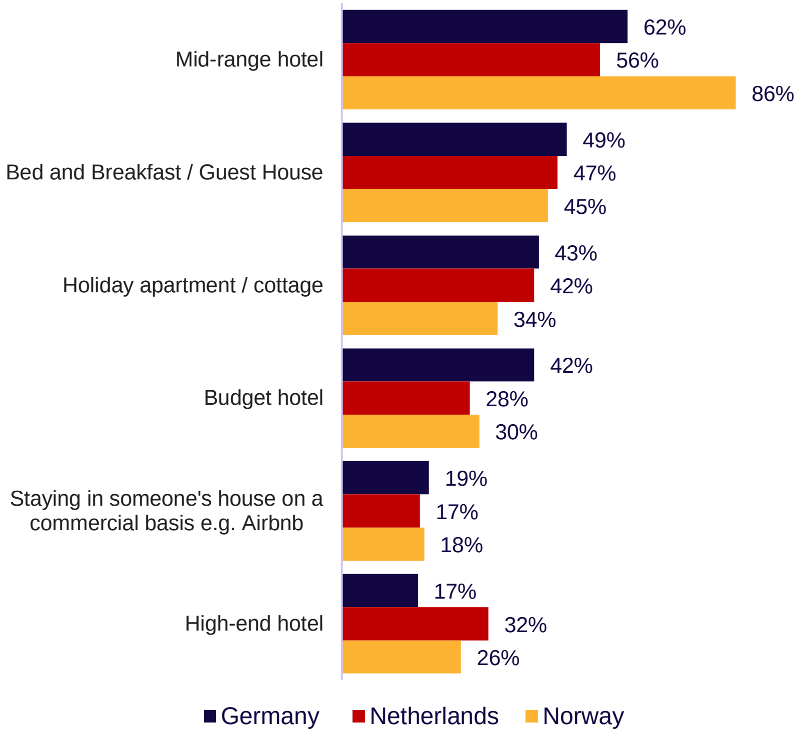
Source: DEF Activities & Themes Research, 2017

Accommodation

A wide range of accommodation will be considered, though the Norwegian preference is clearly for mid-range hotels

- Accommodation is **not** a main motivator for visiting England; Only 16% of visitors see the variety & quality of accommodation as a motivator. However it is an important part of the overall experience and so it is important to meet visitor expectations in all types of accommodation

Accommodation considered



Germany

There is a clear difference around accommodation choices with The Urban Collective target (Young Active Explorers / 18-34 year olds) much more likely to consider budget hotels (56%) and 1/3 considered Airbnb-type options.

The Cultural Renaissance Collection targets Cultural Adventurers and 35-54's are more likely to chose a mid-range hotel.

Netherlands

The country most likely to consider a high-end hotel, with little difference across the segments or in different age groups. Younger travellers and Young Active Explorers are open to considering a wider range of accommodation types in particular self-catering (B&B, apartment, Airbnb type) and budget hotels.

Norway

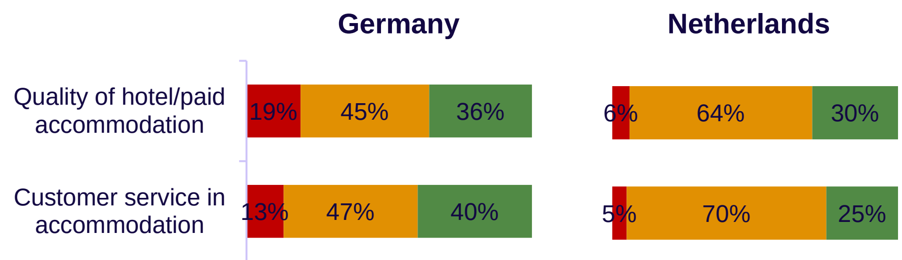
Despite the highest hotel spend, travellers from Norway are most likely to consider mid-range hotels (though care should be taken to explore the perception of 'mid-range' in terms of facilities and services).

Again we see consideration of a broader range of accommodation among the younger travellers and Young Active Explorers:

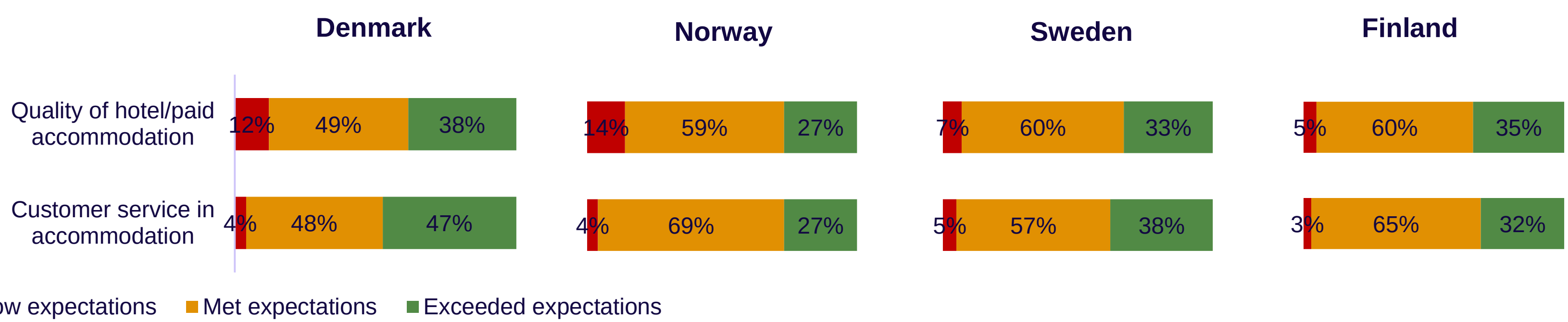
Accommodation considered in England visitors/considers from Norway	High-end Hotel	Budget Hotel	Apartment/ Cottage
18-34's No Kids	45%	44%	47%
Young Active Explorers	47%	42%	46%

DEF Activities & Themes Research, 2017

Expectations of accommodation are generally met or exceeded, but the small areas of negativity need to be heeded



The 19% in Germany, 12% in Denmark and 14% in Norway who said the ‘quality of accommodation’ did not meet their expectations, suggests a need to provide clear and honest information on hotel standards, facilities and breakfast, so as not to disappoint.



The 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

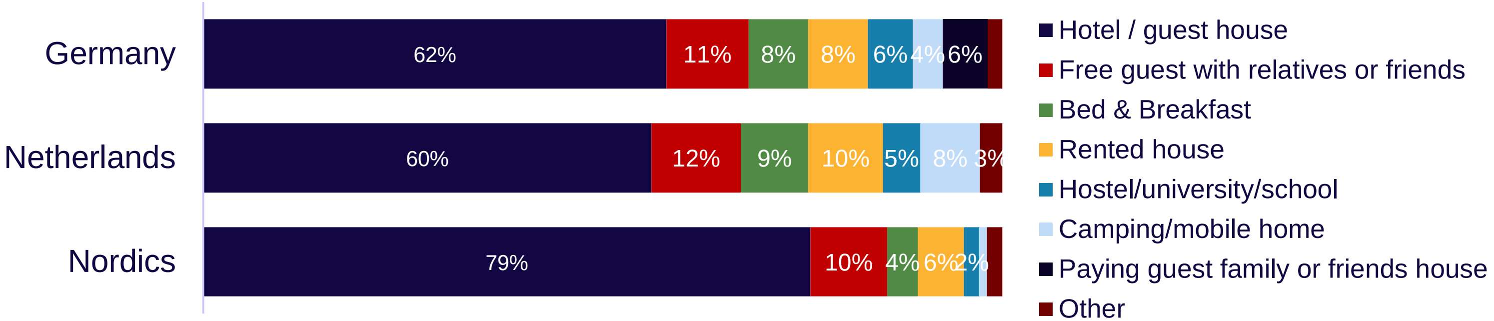
Whilst Nordic markets were not included in this research this illustrates the potential barrier to be overcome in convincing the Travel Trade of the England opportunity.

Source: CAA passenger study 2015

Hotel accommodation dominates, but the spend per night varies by country and by age group

Accommodation stayed in is predominantly hotels, particularly for visitors from the Nordic countries

Accommodation stayed in on holiday



Average Spend per night per holiday visitor

The under 35's tend to spend the least on accommodation and this should be considered when selecting/positioning hotels for the Urban Collective.
The 35-54 years typically spend more, particularly those travelling from Norway. This perhaps suggests that the more expensive hotels can be best incorporated into the Cultural Renaissance Collection.

Source: IPS 2014

Hotel reviews provide insight into the perceptions of inbound travellers

The hotels included in the draft itineraries range in published price from c.£75 - £350 per night. Whilst the concept allows for travellers to stay in a variety of accommodation during their trip, it will be important to ensure that there is some degree of consistency in quality levels and that quality standards are maintained, in order that expectations are met at each stop-over. It is important also to explore the extent to which travellers would want to 'mix and match' hotels and self-catering (apartment) within the same trip.
That said the reviews from inbound travellers that are available through review sites such as Trip Advisor, suggest that the hotel choices meet the needs and expectations of travellers with all scoring 4 or more.

Hotels included in the example itineraries

Urban Collective

Newcastle
Hotel Indigo
Roombuzz
MotelOne

Hull
Hideout Apartment Hotel

Leeds
42 The Calls
Art Hostel Leeds

Manchester
MotelOne
Abode
100 Studios

Liverpool
Hope Street Hotel

Cultural Renaissance Collection

Newcastle
Hotel Du Vin
The Townhouse
Jesmond Dene Hotel

Hull
The Kingston Theatre Hotel

Leeds
Quebecs Luxury Apartments
Doubletree by Hilton Hotel

Manchester
The Principal
Hotel Gotham

Liverpool
Titanic Hotel

Gem in old factory architecture with great rooms… a quiet location on the River Tyne, where you can also eat at a charming courtyard, very tastefully decorated spacious rooms wonderful in some cases even with a private terrace and a restaurant with a huge wine list. We have extremely felt comfortable there..(Germany)

is a really typical English hotel, small but very cozy nice staff. Rooms were neat and clean. food was good, really English. (Netherlands)

Terrific little hotel. Everyone who worked there was proper service instant hasty and helped you with everything. Great quiet room with all that was needed. Felt at home. Not in the center but not far from anywhere and taxi within 5 min (Norway)

Everything was perfect .... A highly recommended hotel with stunning views. Received a warm welcome! Delicious food, great location, super friendly staff. The garden around the hotel was beautiful. Will definitely be back!..(Germany)

VisitEngland XV Insight

Food & Drink

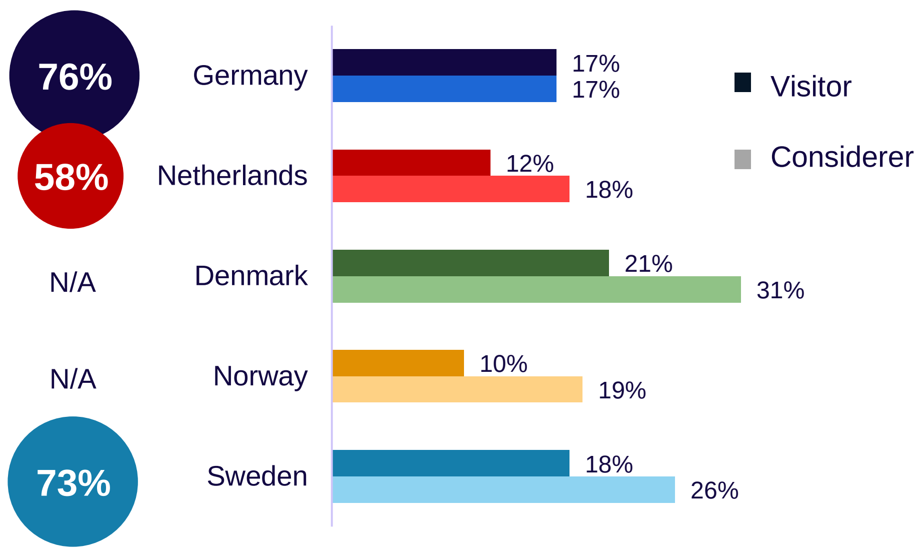
Food and drink, whilst not a driver to visit is an important part of the whole experience

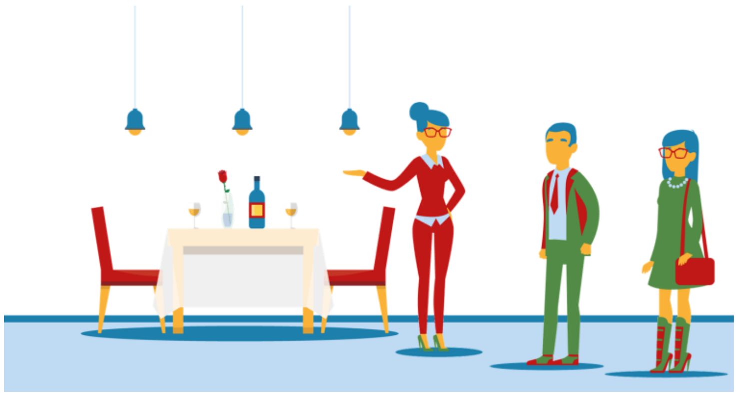
- Food & drink is rarely a main reason to visit Britain (5% of 2015 visitors) but can play a significant supporting role.
- There is appetite to try food & drink related activities among those considering visiting Britain – there is most interest across all target markets in trying local food & drink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

Age	Would try local specialities	Would try high quality (gourmet food & drink)
Total	70%	64%
Under 25 years	63%	59%
25 – 34 years	72%	67%
35 – 44 years	72%	66%
45 – 50 years	73%	66%

Previously tried new food on holiday:

'Sampling the local food and drink' is a reason or motivator to visit Britain on holiday



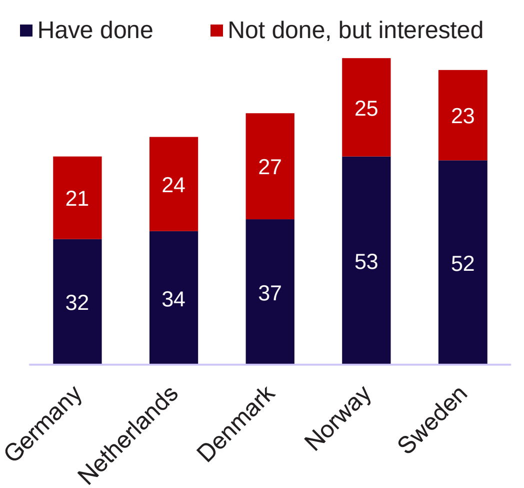


Source: VisitBritain Food & Drink Research, 2017

Reviews are important, with the majority of travellers either having already checked reviews or are likely to in the future

- Nordic travellers are most likely to have already used their smartphones for finding reviews on places to eat and drink. The high level of review use is important to consider when selecting restaurants for within itineraries as most travellers will check what other diners have written.
- This importance is even greater among the 18-34 year olds where, for example, in Norway 91% of travellers have either already consulted reviews or would do in the future. This pattern is consistent across all countries.

Have used or interested in using smartphone to access reviews about places to eat or drink

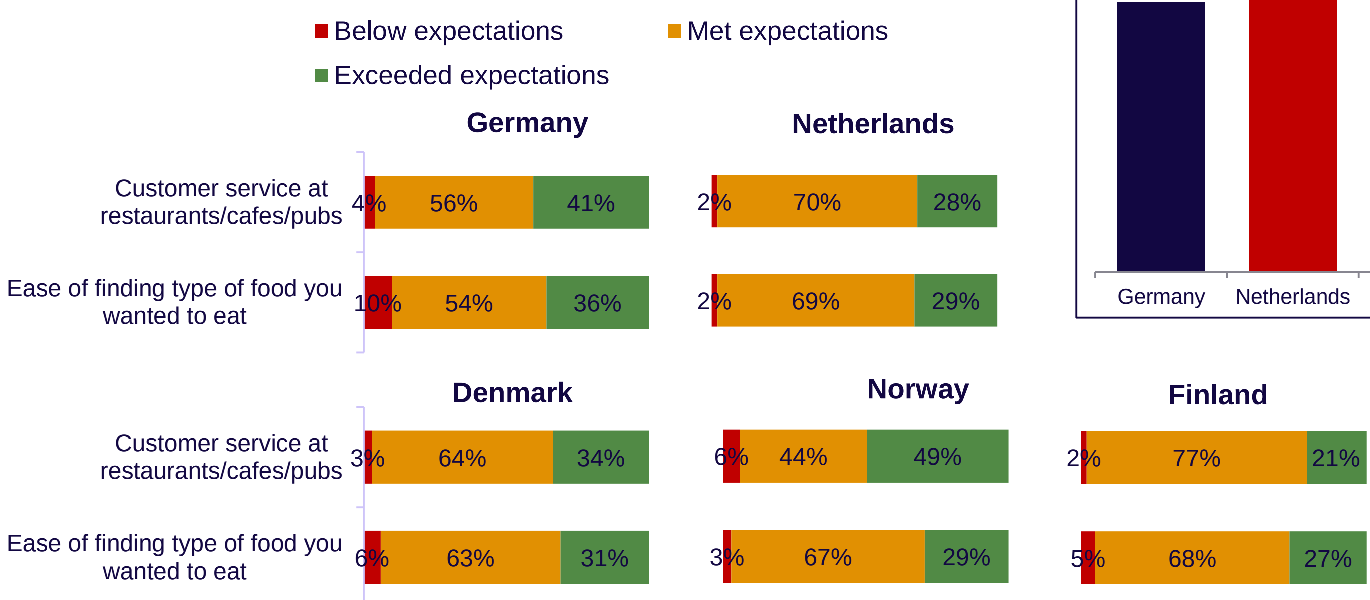


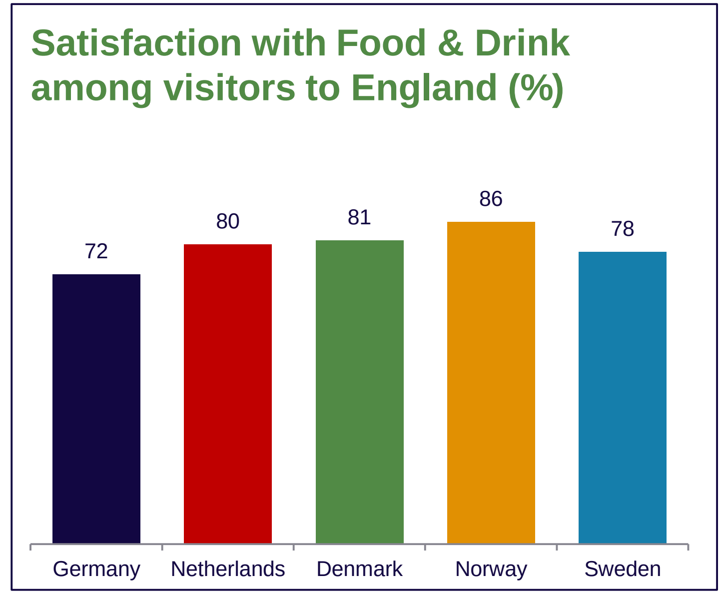
Access reviews about places to eat and drink using a smartphone	18-34 years	35-54 years	55+ years
Germany – Have done	**46%**	34%	22%
Germany – Not done, but would do	20%	20%	23%
Netherlands – Have done	**44%**	32%	21%
Netherlands – Not done, but would do	28%	26%	17%
Denmark- Have done	**54%**	37%	27%
Denmark – Not done, but would do	30%	28%	23%
Norway – Have done	**69%**	**61%**	37%
Norway – Not done, but would do	22%	23%	29%
Sweden – Have done	**65%**	**58%**	39%
Sweden – Not done, but would do	25%	24%	20%

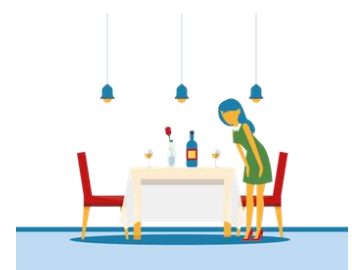
Source: VisitBritain Food & Drink Research, 2017, VisitBritain Decisions & Influences Research, 2016

Satisfaction with the food and drink offer is high and expectations are often exceeded

- Satisfaction with food and drink is generally high
- Up to a third of visitors say that service levels in restaurants exceeded their expectations and that they wee able to find the type of food they wanted to eat

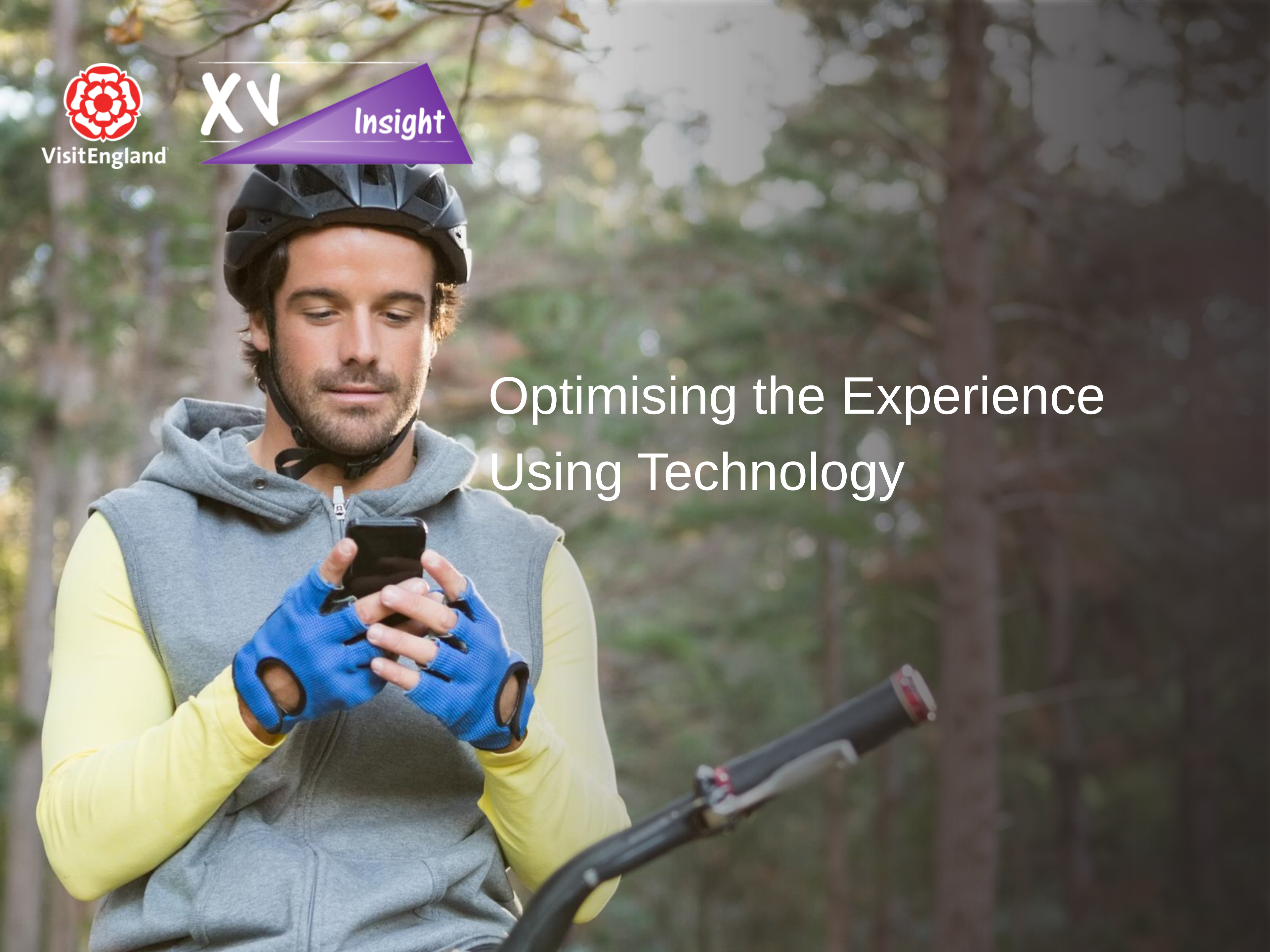






"The good news for destination marketers and food/drink business owners is that authenticity is extremely hard to replicate, meaning people must travel to get a "*real taste*" of something." Erik Wolf

Source: VisitBritain Food & Drink Research, 2017, CAA passenger study 2015



Optimising the Experience Using Technology

Device usage is led by phone, but tablet ownership and usage, even on holiday is widespread too

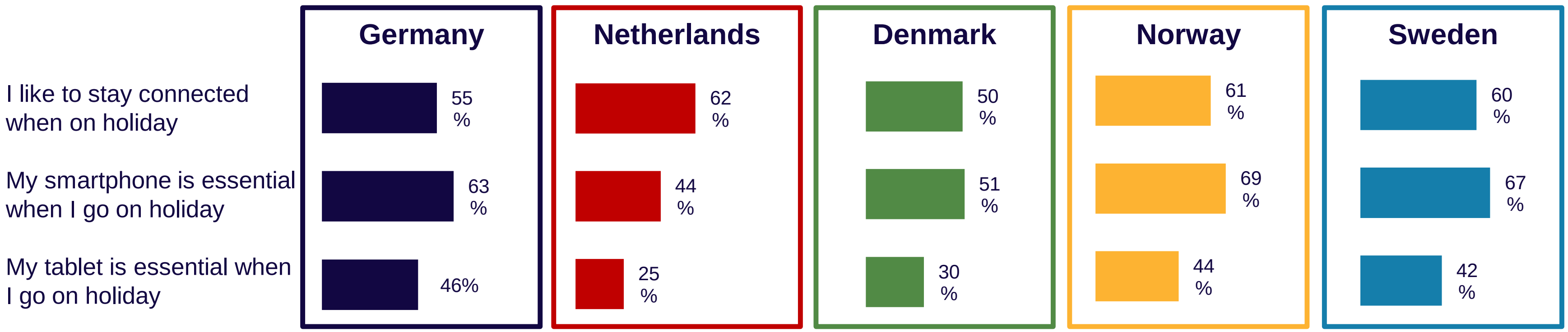
Device Ownership

Device	Germany	Netherlands	Denmark	Norway	Sweden
Smartwatch	8%	9%	5%	9%	9%
Smartphone	86%	86%	84%	90%	87%
Tablet	55%	65%	61%	60%	67%

Main differences by age group

- Germany has higher incidence of smartwatches among under 35's (13%).
- Lower incidence of tablets among young in Netherlands (57%), Norway (55%) and Denmark (50%).
- In Sweden wearable tech is high among both under 35's (15%) and 35-54's (13%).

Attitudes to Tech on Holiday

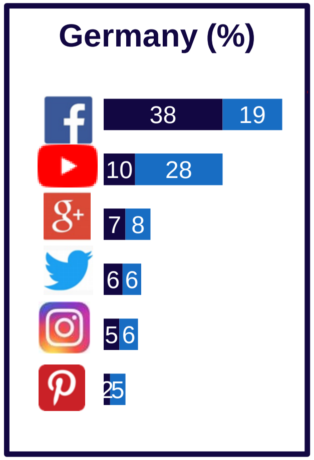


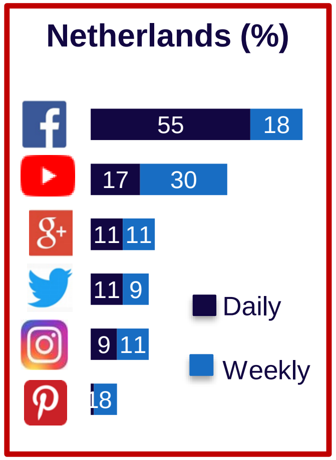
- As might be expected younger people are more likely to stay connected on holiday in Netherlands & Germany. This is driven smartphones which are more likely to be deemed essential among the under 35's (Germany 77%, Netherlands 54%)
- For tablets there is only a marginal increase among younger travellers in Germany and Netherlands
- The Nordics have no notable age driven differences

Source: Researching and Planning Research, 2016

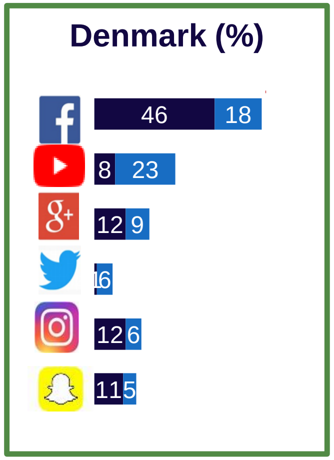
Social media presence is now part of everyday life, particularly in the Nordics, where activity includes sharing and information/advice seeking

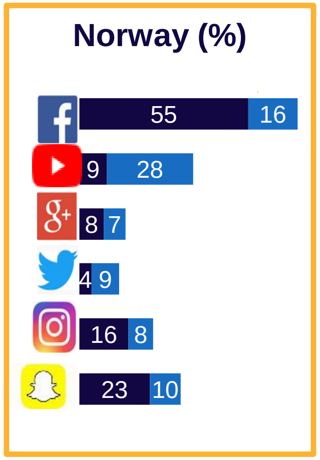
Social Media Usage

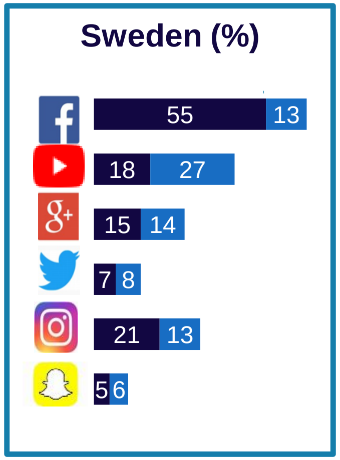




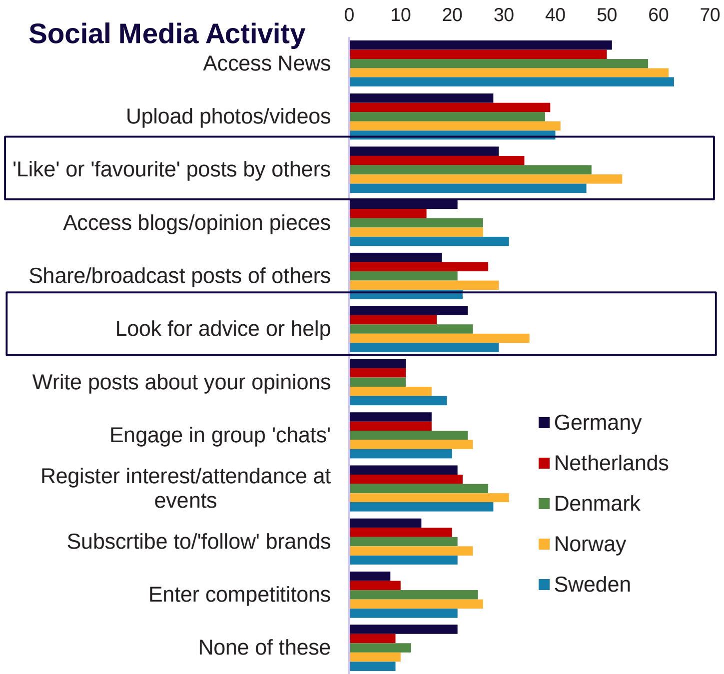
- Facebook dominates in all countries, with YouTube generally second most popular.
- In the Nordics Instagram and/or Snapchat are more frequently used than they are in Germany and Netherlands.





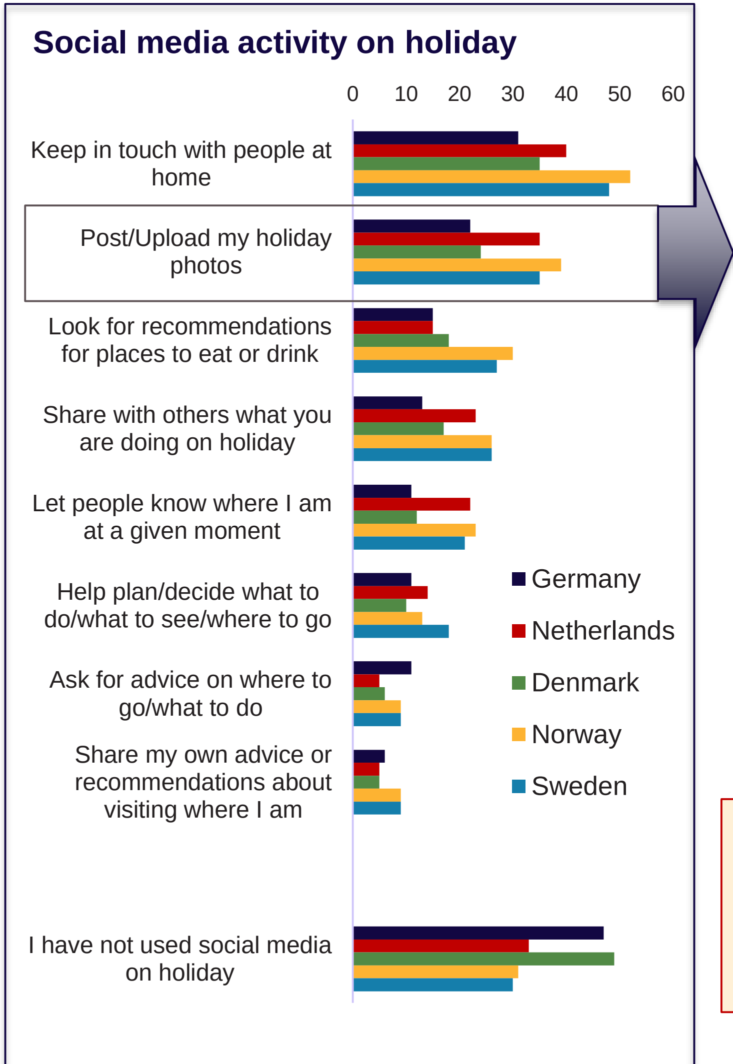


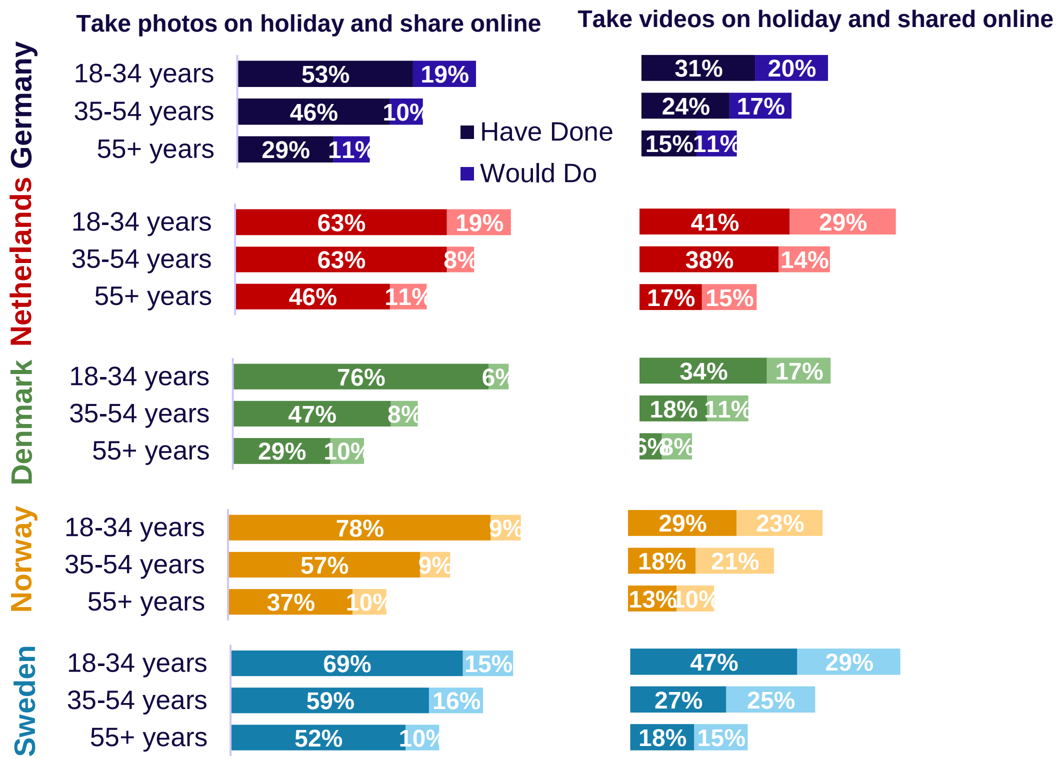
- Norway and Denmark are particularly active on social media.
- Usage is broad – information & opinion seeking, sharing and responding to content.
- Interestingly almost a third of Norwegians and Danes like to enter competitions online. This may be a promotional tool that could be used to generate awareness and interest.



Source: Technology and Social Media, 2016

Instagram-ready experiences and easy access to reviews and recommendations should appeal particularly to travellers from Norway, Sweden and Netherlands





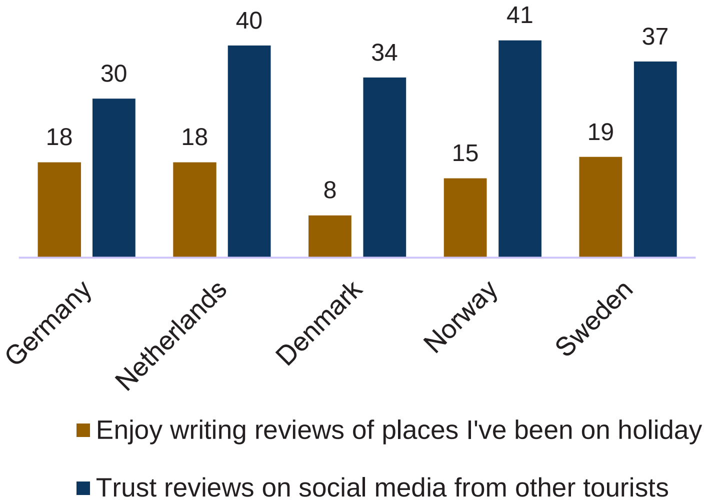
Instagram Ready

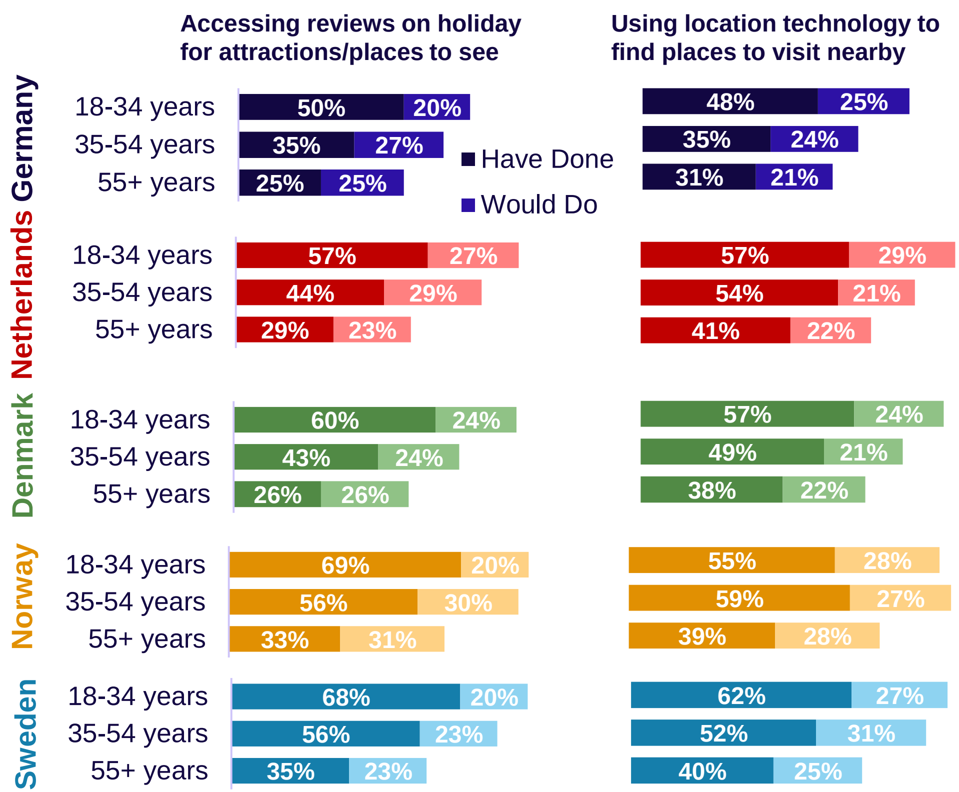
- We have already seen the higher usage of social media in the Nordics particularly the visual sites (Instagram, Snapchat and Facebook).
- Sharing holiday experiences including photos is very prevalent among Norwegian and Swedish travellers and particularly among younger travellers.
- This therefore suggests that ‘Instagram-ready’ will resonate with the target audience.

Source: Technology and Social Media, 2016, VisitBritain Decisions & Influences Research, 2016

The importance of reviews is evident in all target markets

- Over a third of travellers from target markets trust reviews from other travellers. The lowest level is in Germany, perhaps reflecting the overall lower usage of technology and social media





- Reviews are important in all countries though people are more likely to read them than to write them.
- Smartphones are the main device used to seek information on attractions/places to eat particularly for Norwegians and Swedes.
- Interest in location technology is high, particularly among the younger age groups
- An app to support the itinerary that provides easy access to information on destinations and activities may be valuable to this audience

Source: Technology and Social Media, 2016, VisitBritain Decisions & Influences Research, 2016

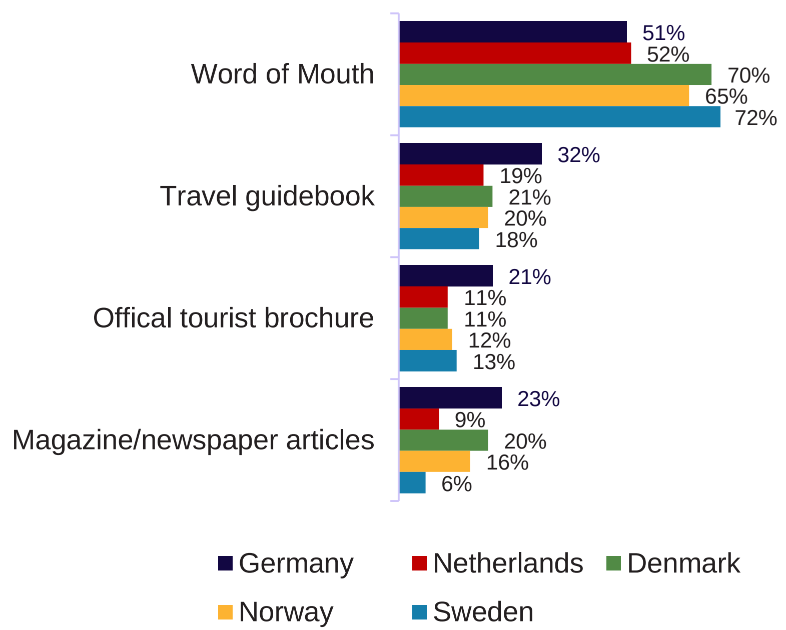

VisitEngland
XV Insight
Planning & Booking
The Purchase Journey

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

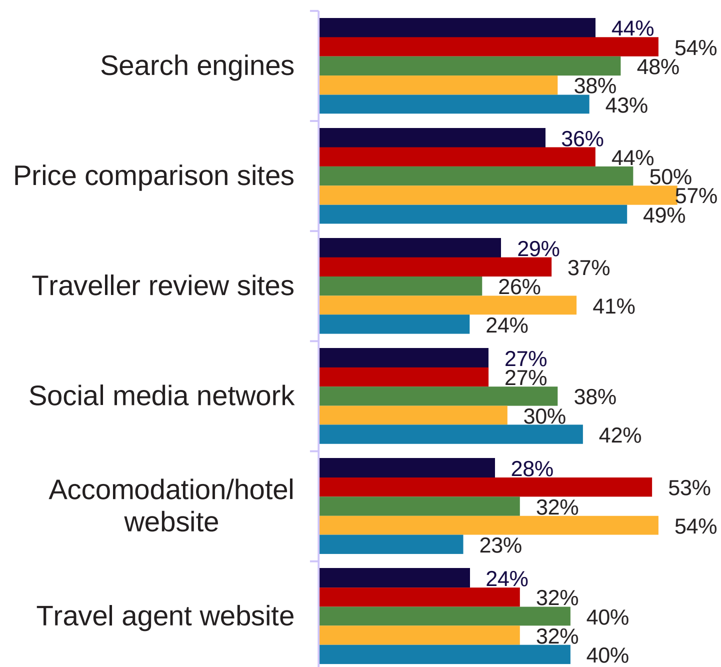
- While ‘word of mouth’ is the biggest influence across all age groups on destination of choice, there are some key differences to be noted for your target markets and segments.
- Those in the Netherlands are more likely to build their holiday themselves via search engines and direct with the accommodation provider, while in Germany, word of mouth is key. This is reflected in greater number of influences on their decision.
- The importance of hotel websites should be noted especially for Netherlands and Norway, whilst smaller independent hotels add to the unique English experience they also need to be visible online in order to be accepted in the target countries.

Top Sources of Influence on destination

Offline



Online

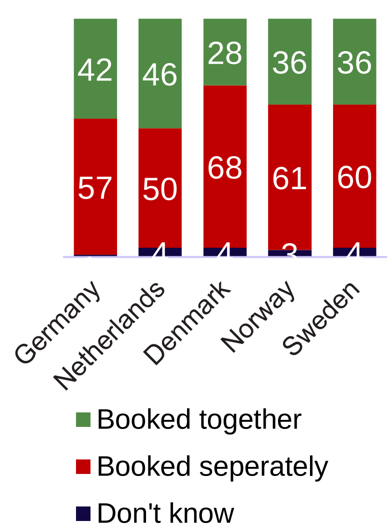


Source: VisitBritain Researching and Planning Research, 2016

Making the booking: Travel and Accommodation is often booked separately, particularly in the Nordic markets

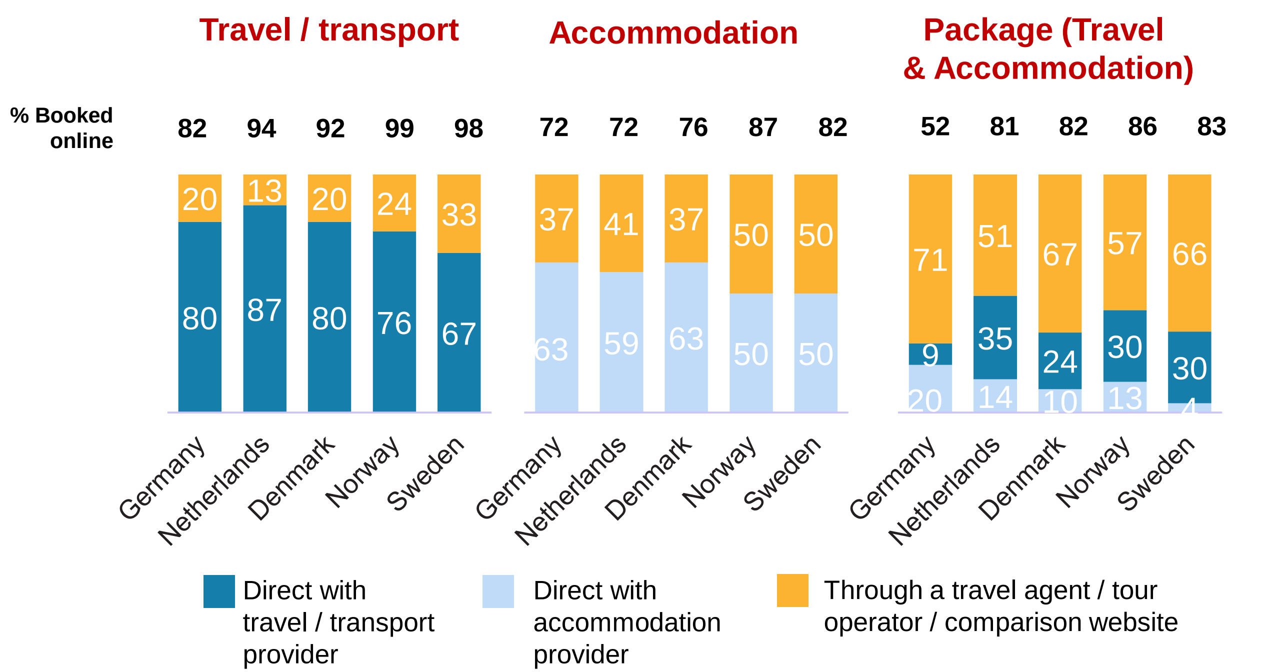
Travel & Accommodation Booking

- Over half book travel and accommodation separately and this is highest among those from the Nordics



Channel used to book trip elements

- Typically when transport and accommodation are booked separately, they are booked direct with either the travel / transport provider or direct with the accommodation provider. However in the Norway and Sweden a significant volume of accommodation is booked through a third party.
- The Nordics and Netherlands are more likely to make their bookings online.

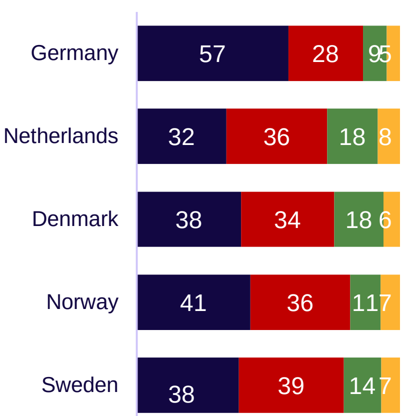


Source: VisitBritain Researching and Planning Research, 2016

The planning process: The length of the booking process varies by market and by age; the lead time to booking is longest in Germany – important to take into account when planning and implementing marketing activity

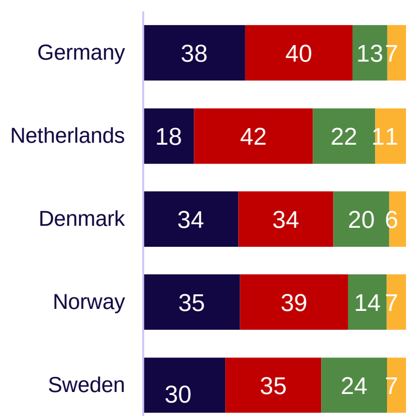
Started thinking about their trip (%)

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



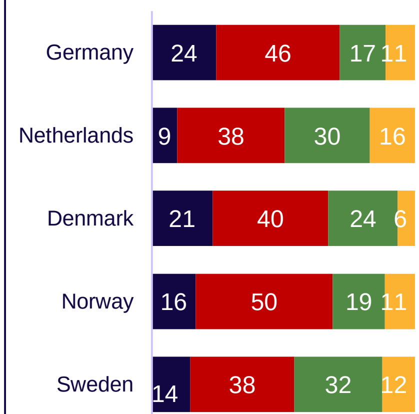
Decided on the destination (%)

- Typically between 3 and 6 months prior to the visit.
- German visitors have made their decision furthest in advance, although visitors from the Nordics also decide on the destination further in advance than those in the Netherlands.



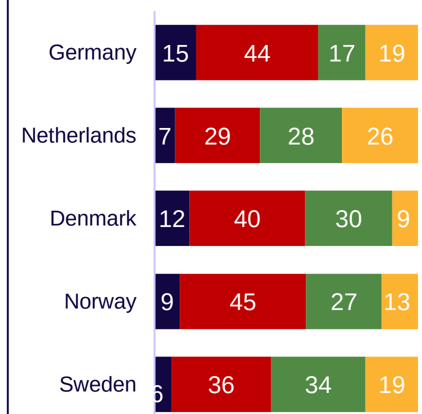
Looked at options / prices (%)

- Typically between 3 and 6 months before.
- Those in the Netherlands and Sweden tend to leave researching options until closer to their trip.



Booked the trip (%)

- Typically booked less than 2 months in advance of visit.
- Those in Germany are most likely to have booked more than 3 months in advance.



Age: 65+ year old's are most likely to decide furthest in advance across all the stages.

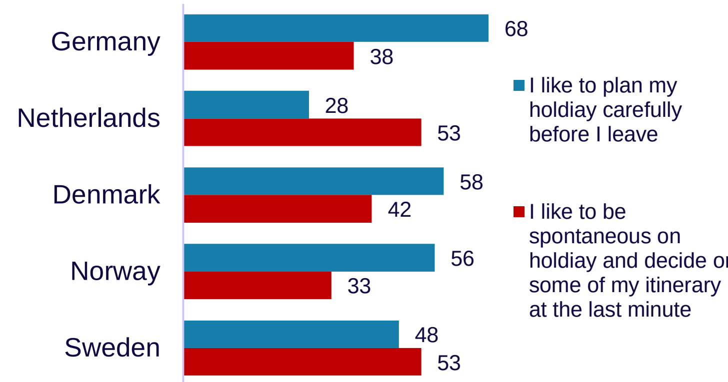
More than 6 months before | 3-6 months before | 1-2 months before | Less than 1 month before

Source: VisitBritain Researching and Planning Research, 2016

Holidays for the target audience need to combine pre-planned elements and scope for spontaneity

Planning vs Spontaneity

- Germans do the most planning in advance but is notable that the Nordics do also like to plan in advance.
- However there is still a large number who also like some spontaneity in their holiday, so itineraries that offer some flexibility or 'free time' may be appealing.
- Young Germans like to plan at similar levels but more claim to like spontaneity too (47%).
- Interestingly younger Dutch travellers are more likely to plan carefully in advance (39%), but there is no difference in their desire to be spontaneous.
- No age difference in Norway or Denmark.
- Young Swedes are marginally more likely to be spontaneous.



Pre-booked Activities

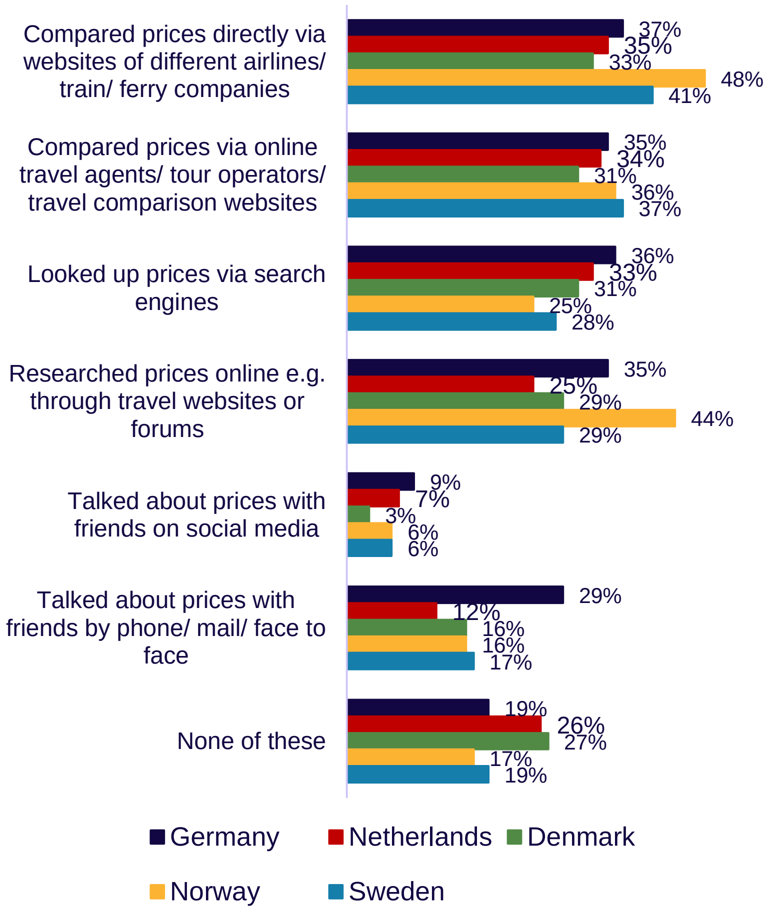
- Currently holiday activities are a mix of advance and during the trip bookings.
- This provides scope to encourage more pre-booking, though the desire for spontaneity should be respected with some scope to alter itinerary details mid-trip
- The younger age groups are less like than all but Sweden to buy tickets for tourist attractions. Including them within itineraries should generate incremental volume

Pre Booked prior to trip	Booked during trip	Germany	Netherlands	Denmark	Norway	Sweden
Sightseeing tours outside of London	Total	16 25	18 18	5 4	5 11	8 10
	Under 35's	22 19	12 13	7 2	6 20	13 9
Tickets / passes to other tourist attractions	Total	24 37	20 51	16 42	14 40	16 36
	Under 35's	29 41	14 13	12 2	15 20	27 38
Theatre/ musical/ concert tickets	Total	19 19	23 30	22 14	19 18	21 19
	Under 35's	24 17	23 13	20 17	18 20	25 14

Source: VisitBritain Researching and Planning Research, 2016, VisitBritain Decisions & Influences Research, 2016

Price Sensitivity is high, particularly among the Norwegians. The Dutch and Danes are least likely to price check in multiple sources

% who would do this before booking a holiday to Britain (visitors & Considerers)



- There is some level of increased price comparison activity among younger travellers, but the pattern is not always consistent.
- In Germany search engines and transport company websites are more widely used by under 35's. They are also more likely to talk to friends (online & offline)
- In Norway only the use of OTAs is higher among under 35's (46%)

Future Travel Trend – *Conversational Commerce*

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

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

MALE, 64, GERMANY

Source: Inbound consumer sentiment research, VisitBritain Decisions & Influences Research, 2016, The Future Travel Journey

Online Travel Agents are an increasingly important part of the travel trade

- OTAs have grown over recent years and new brands and propositions have been launched. Airbnb has over 3m listings, Booking.com has nearly doubled in size since 2015. Consolidation has led to Expedia and Priceline, Orbitz Worldwide and Travelocity dominating.
- Most operate on global or at least multi-market platforms. Technology drives the offer and 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.

The Traveller View

OTA's play a significant role in enabling travellers to be confident with the price they are paying. 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 Younger people in Germany are more likely to compare prices across OTAs.

%Strongly agree/agree about booking travel though OTAs	DE	NL	Denmark	Norway	Sweden
I often compare prices from multiple OTA websites	62%	63%	58%	63%	60%
OTAs are a good way of finding a destination within my budget	64%	61%	60%	60%	60%
Best way of getting the lowest price	55%	45%	45%	38%	51%

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

Source: https://www.cloudbeds.com/articles/analysis-major-online-travel-agencies-otas-update-august-2017/, DEF Travel Trade Research June 2017, VisitBritain Decisions & Influences Research, 2016

Summary – key take-outs

Key take-outs and opportunities (1) – The Two Concepts and their Target Audiences

The Urban Collective
- 20-35 year olds
- Young Active Explorers

- Young travellers are more likely to research online, use OTAs and compare prices, so price competitiveness will be important.
- Reviews are important to the young audience in all countries.
- Instagram-ready is very important to the 18-34 year olds in all markets.
- Online material needs to be optimised for smartphone rather than tablet (tablet ownership is lower among younger people).
- Reviews of places to eat and drink will be checked so destinations need to be chosen carefully.
- Average accommodation spend is currently well under £100 per night. Mid-price hotels may have the widest appeal for this concept.
- Young Active Explorers are more likely to consider different types of accommodation, which may provide opportunity for apartments and other self-catering options.

The Renaissance Collection
- 25-50 year olds
- Cultural Adventures

- Cultural Adventures from Netherlands less likely to consider public transport, so a self-drive option could be offered.
- Reviews are important for Norwegians and Swedes 35-54yrs and Instagram-ready may also resonate with this audience.
- Reviews of places to eat and drink will be checked, particularly by Nordic visitors so destinations need to be chosen carefully.
- Average accommodation spend reaches £135 per night among 45-54 year olds from Norway. Higher end hotels may have a wider potential for this concept.
- Cultural Adventurers tend to prefer ‘mid range’ hotels, though clarity may be needed around what constitutes ‘mid-range’ service and quality levels.

Key take-outs and opportunities (2) – The Two Concepts and their Primary Audiences

The Urban Collective
- 20-35 year olds
- Young Active Explorers

Themes and Activities

Germany
- Young Active Explorers are interested in famous/iconic places possibly with a film/TV connection but are less interested in castles etc.
- Local food and drink is of interest along with experiencing local nightlife.
- The segment (and age group) would potentially want to attend various events – sporting, theatre concerts, festivals etc.

Netherlands
- Young Active Explorers are interested in historic sites and famous/icon places, but are less interested in Film/TV connections than other segments/older travellers
- Food and drink has interest, particularly opportunities to try local specialities and experiences
- The segment are also keen to experience the local nightlife

The Renaissance Collection
- 25-50 year olds
- Cultural Adventures

Themes and Activities

Germany
- Historic and famous sites are important.
- Parks and gardens also appeal to the segment and the age group, so may be good to build in to some itineraries.
- Food experiences are also important.

Netherlands
- Historic/famous sites are important also museums and cultural attractions
- Film/TV themes appeal to Cultural Adventurers though less so to the wider 35-54 year olds.
- Food experiences are important to the target segment.
- Shopping for luxury/designer products appeals to the target segment.
- Spas and wellness treatments are of interest to the segment, though again not to the wider age group.
  - Plays/musicals

Key take-outs and opportunities (3) – The Two Concepts and their Primary Audiences

The Urban Collective
- 20-35 year olds
- Young Active Explorers

Themes and Activities cont.

Norway
- Young Active Explorers and 18-34 year olds in general, are interested in famous iconic sites and in those with film and literature connections.
- Specific activities that resonate with this group
  - Food & drink
  - Local nightlife
  - Concerts – pop, plays, classical
- Personal indulgence either in spas and/or adrenalin activities also appeal and could be good optional activities within itineraries.

The Renaissance Collection
- 25-50 year olds
- Cultural Adventures

Themes and Activities cont.

Norway
- Cultural Adventurers have wide interests across historic, iconic sites, monuments and parks and garden, though the wider 35-54 year olds age group is les interested in historic sites and parks/gardens.
- Shopping for clothes and locally made products should be possible within the itinerary.
- Specific activities that have higher appeal to this group
  - Gourmet meals and local specialities
  - Local nightlife
  - Sporting Events
  - Plays/musicals

Key take-outs and opportunities (4) – overarching themes

Norway and the Nordics
Activities and themes data is only available for Norway. Whilst Norway is an indicator of the Nordic region there are differences seen in other data across the countries and so further investigation/research may be needed around specific aspects of the concept and proposition in Denmark and Sweden.

Observations	Implications
Duration of Stay: Many visitors from all markets and particularly among the younger target of 18-34 year olds, stay for less than a week.	Itineraries should include a shorter option for those who only wish to stay 3-4 nights. It may also be appropriate to lead in messaging with the shorter itinerary and an option to extend to 7 nights. Those looking for a short break may be put off by a 7-night promotion.
Seasonality: Visitors from the Nordics are spread quite evenly across the who year.	There is opportunity for year-round visitor volume. Seasonally focused itineraries may encourage multiple visits for different experiences.
Building Familiarity and Consideration: Currently Manchester and Liverpool have much higher holiday visitor volumes.	The combination of the more recognised cites with the 'new discoveries' of Leeds, Hull and Newcastle can combine well, though the views of trade should be considered around which cities to lead with, given the different visitor volumes currently.
Travelling between cities: • Young travellers from the target countries are generally happy to travel by train, though many do not book in advance. • Expectations of using public transport are generally met or exceeded. • Some concerns around time spent travelling between cities.	Train travel should work well, provided routes and times are clearly detailed. The Cultural Rover ticket needs to be as flexible as possible, ideally with no time restrictions. Advance train tickets can be included as part of the package and can be positioned as a 'hassle-removing' benefit Consider routes and itineraries to minimise time spent travelling between cities and/or offer 'stop-off' options on longer journeys.
English Culture: It appears that our culture is not a driver to visit for those from Norway and Sweden, but this appears to be because they do not necessarily perceive our culture to be different to theirs.	Building 'English Culture' into the communications and itineraries may help to build curiosity around the concept. This may be delivered through attractions, food and drink offers and the accommodation choices.

Key take-outs and opportunities (5) - overarching themes

Observations	Implications
Cultural Adventurers – Netherlands (Renaissance Collection) are less likely to consider public transport and organised coach tours.	May need additional reassurance around public transport options. Private hire transport to and from the airport may be an option. Over half of this segment in Netherlands would consider driving (their own or a hire car). The Renaissance Collection may offer a self-drive option to attract these people.
Accommodation • There are different requirements across a range of hotel levels and apartment/self-catering options. • Generally hotels live up to or exceed expectations, but a significant minority of Germans, Danes and Norwegians are not happy with quality/value.	The target audience have a range of hotel expectations from budget to high-end, particularly among the younger audience where income will influence choice. Itineraries could provide a choice of hotels/accommodation to meet the different needs, though consistency of standard within an individual itinerary should be provided. The selection of hotels should be carefully made and monitored to minimise the risk of dissatisfaction. The travel trade is also known to have some concerns over accommodation standards so there will be a need to reinforce information around hotel standards.
Food and drink • Generally important to visitors from Norway in particular. • Sampling local food and drink is of interest to those from Denmark and Sweden and among younger travellers. • Reviews are an important part of the decision making process particularly among Nordic visitors.	Opportunities to visit gourmet, famous, quirky restaurants are likely to appeal to this audience an could be prominent in itineraries and communications. Providing quality local food experiences should appeal. As with accommodation care must be take to monitor standards carefully given the importance of reviews. Poor reviews on just one of the suggested restaurants could have a negative impact on perceptions of the whole trip.
Shopping is important for the target markets, Norway in particular.	Shopping should be included within the itineraries and communicated in marketing material. Some adjustment to messaging may be needed to focus on clothes and luxury for the Urban Collective and more on local ‘English’ products for the Cultural Renaissance (even though the destination may be the same).

Key take-outs and opportunities (4)

Observations	Implications
Technology: is important to travellers from all countries and this typically decreases with age. Social media activity is high, particularly in the Nordics.	Online/app presence will be helpful for information on all elements of itineraries, whether accessing train times, learning more about destinations or checking in to hotels. Tech will be used to access (and write) reviews.
Instagram Ready: Particularly important for the younger travellers from all countries.	Uploading photos and videos to share online is a popular activity and appears to form an important part of the holiday experience.

The Purchase Journey	
• Nordic travellers typically do more research and seek out wider opinions than those from Germany and Netherlands.	Visibility, particularly online will be important to raising awareness and consideration among the Nordic audience. The German market is still quite active offline, so printed material will likely also be needed.
• Lead times for bookings are typically 3-6 months before	Whilst the peak in bookings is 3-6 months in advance the purchase journey often starts over 6 months in so promotion will be needed well in advance. The significant minority who book less than a month before travel demonstrate the need for continued promotion throughout the year.
• Tickets are currently often booked during the trip	Pre-booking of attractions will need to be encouraged and a benefit or value in doing so communicated.
• Price sensitivity is high particularly from Norway.	Visibility and consistency on price comparison sites and via OTAs will be important.

Appendix

Data sources

Links to data sources

- VisitBritain Decisions & Influences Research, 2016
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/visit_britain_decisions_and_influences_report_final_07.04.17.pdf
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/holiday_bookingv3.pdf
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_150_-_researching_and_planning.pdf
- VisitBritain Food & Drink Research, 2017
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_146_-_how_the_world_views_britains_food.pdf
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/food_drink_research_summary_v3.pdf
- DEF Activities & Themes Research, 2017
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_initial_summary_report_v6_310816.pdf
- Inbound consumer sentiment research
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf
- The Future Travel Journey
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/the_future_travel_journey_toolkit_final.pdf
- VisitBritain Researching and Planning Research, 2016
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_150_-_researching_and_planning.pdf
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_151_-_ipsos_booking_final.pdf
- VisitBritain Beyond London, 2013
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/2013-7%20%E2%80%98Beyond%20London%E2%80%99%20Research.pdf
- Destination Type Summaries March 2017
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_destination_towns_v4.pdf
- VisitBritain Market and Trade profiles
  - https://www.visitbritain.org/markets
- DEF Visitor Research Qualitative 2017
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def_research_-_qualitative_research_reportv2.pdf
- Technology and Social Media, 2016
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_152_-_tech_and_social_media.pdf
- Discover England: summary insights on overseas visitors to England's regions
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/discover_england_initial_summary_report_v7_140817.pdf
- CAA Passenger Study 2015
  - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_154_-_the_visitor_experience.pdf
- IPS – International Passenger Survey
  - https://www.visitbritain.org/about-international-passenger-survey


VisitEngland
XV Insight