



VisitEngland™

Discover England Fund Research Summary Report

The Great West Way
March 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.

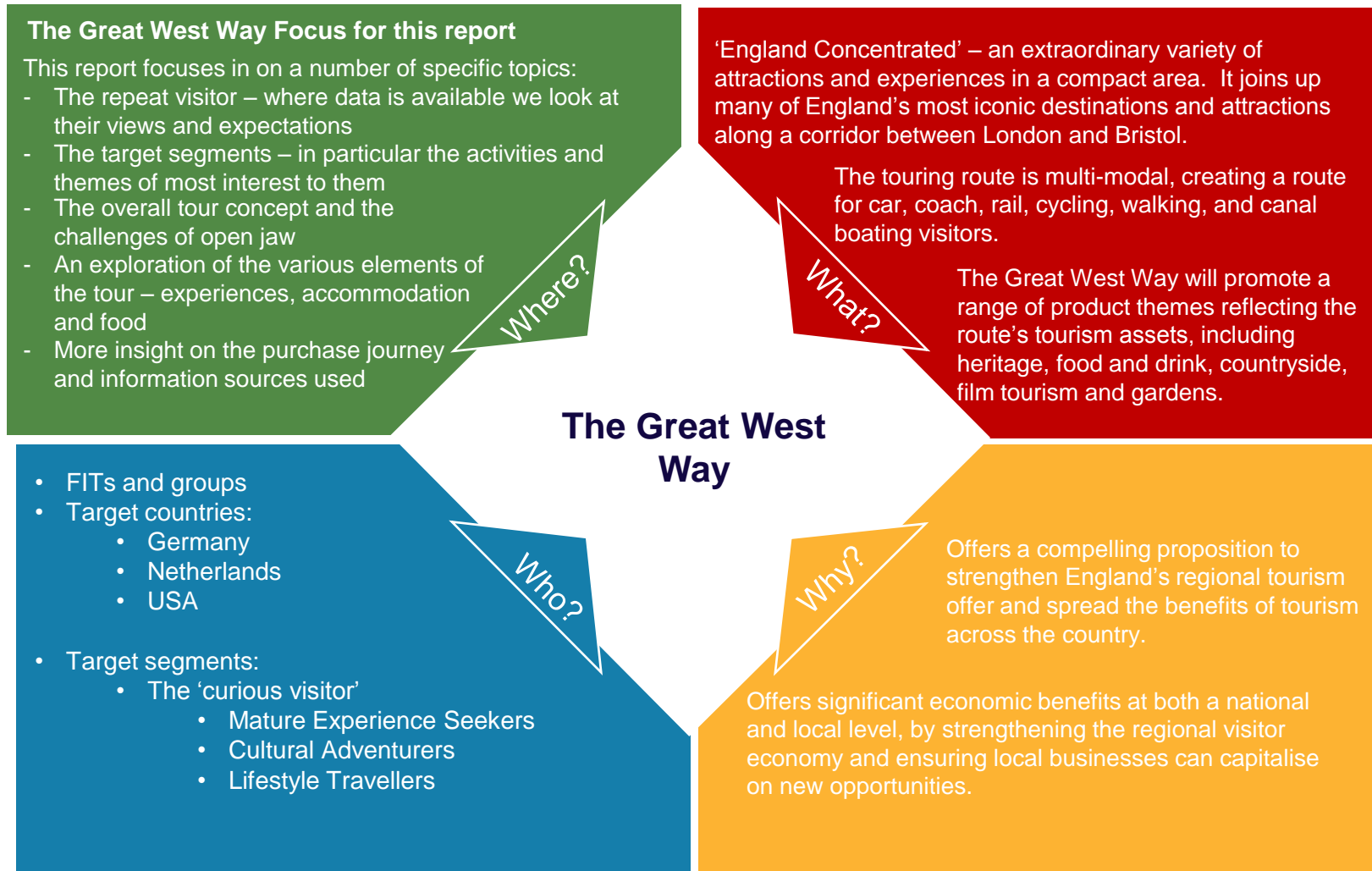


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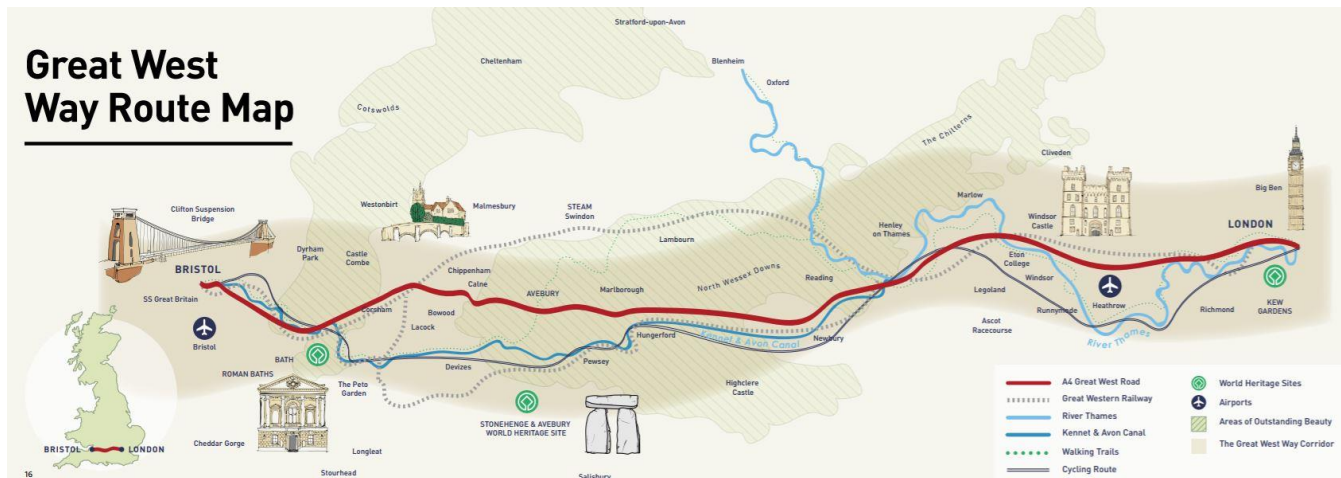
Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.

Project overview



Proposition

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



‘England Concentrated’



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Insight

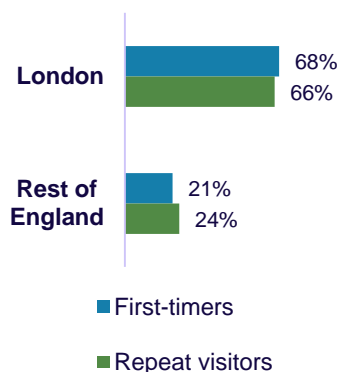
First Time Visitors Vs Repeat Visitors

How different are they?

Repeat Visitors are the majority, but their behaviour and attitudes are not hugely different to First Time Visitors

Market	Proportion of repeat visitors
Germany	62%
Netherlands	76%
US	58%

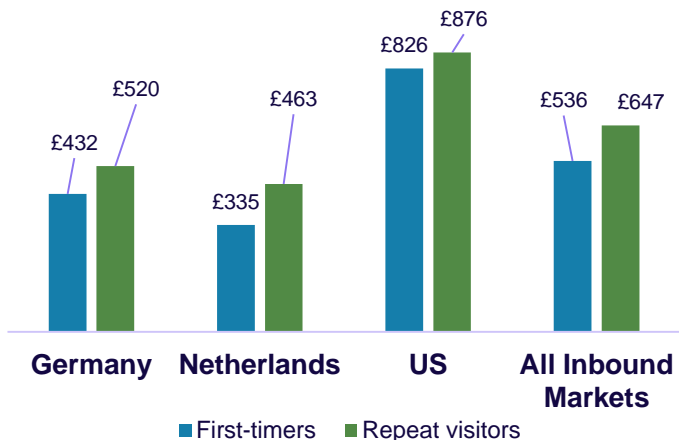
Region visited by Repeat and First-time holiday visitors



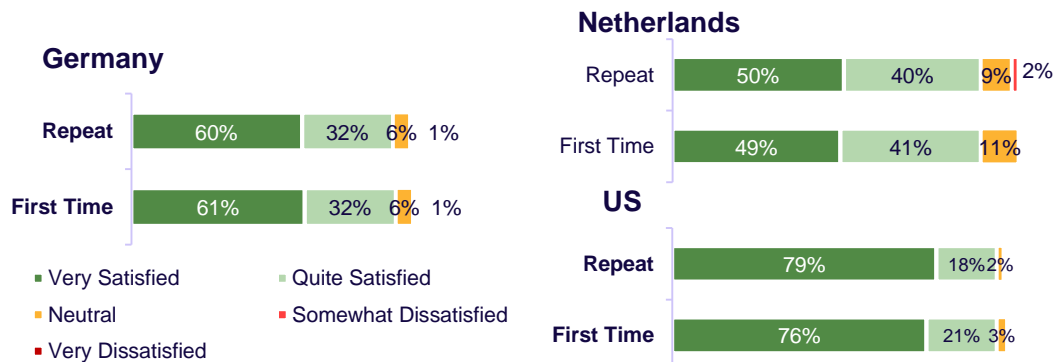
- Repeat Visitors do provide a greater revenue opportunity – they are the bigger share of visitor volume, spend more per visit (driven by spend per night and duration of stay) and are slightly more likely to travel beyond London
- The slides that follow explore a number of overall metrics to illustrate the similarities between Repeat and First Time Visitors
- However in many aspects of their behaviour and attitudes they do not differ dramatically from First Time Visitors
- Therefore, throughout this report, where possible we focus in on repeat visitors and/or those who have previously visited Britain. In some instances we include analysis of all visitors when it is not possible to look just at repeat visitor data, but we feel there is value and relevance in the analysis to the Great West Way

Up to three-quarters of visitors from focus countries are repeat visitors so they are clearly an important target

Av. Spend per visit



Attractions/Activities compared to expectations**



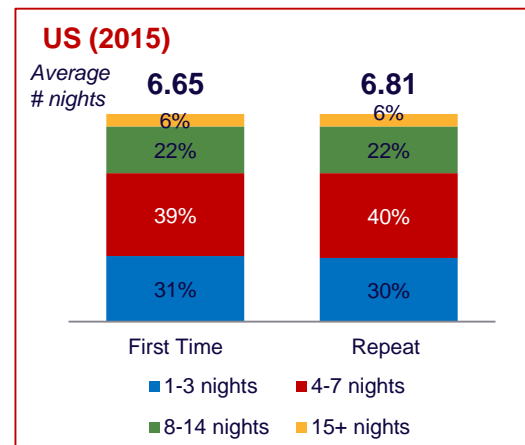
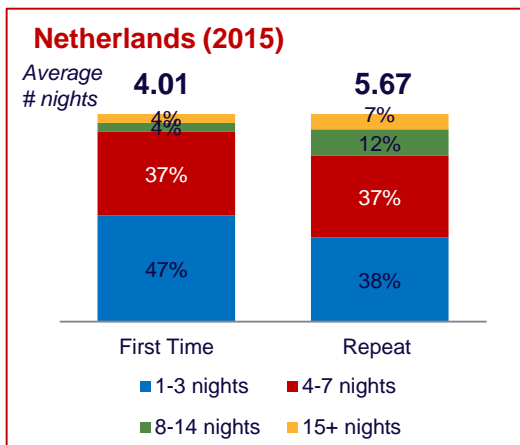
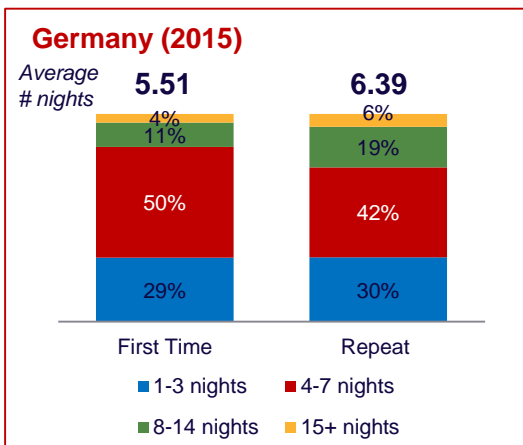
Source: IPS 2015

Note: Repeat visitor analysis is based on repeat visitors in the last 10 years, excludes ex-pats and is based on holiday visits only

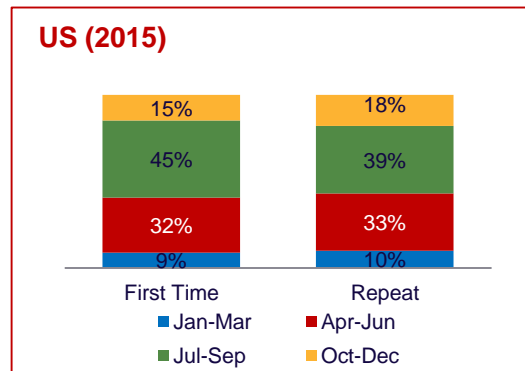
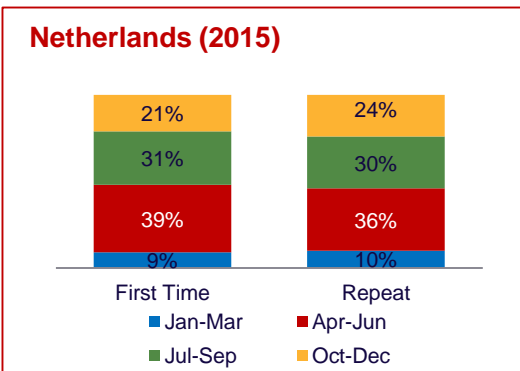
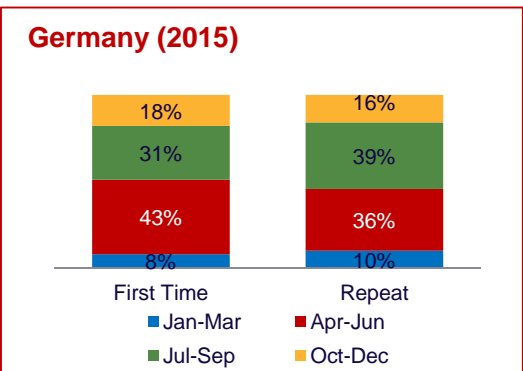
Repeat Holiday Visitors may be open to slightly longer itineraries

- With Repeat Visitors staying on average around 6 nights, itineraries can be slightly longer than if First Time Visitors were the target
- Seasonal trends are less consistent:
 - Repeat Visitors from Germany are more likely to visit July-September.
 - There is limited difference between First Time and Repeat Visitors from Netherlands and US. In both cases marginally more repeat visits are in Oct-Dec.

Duration of visit

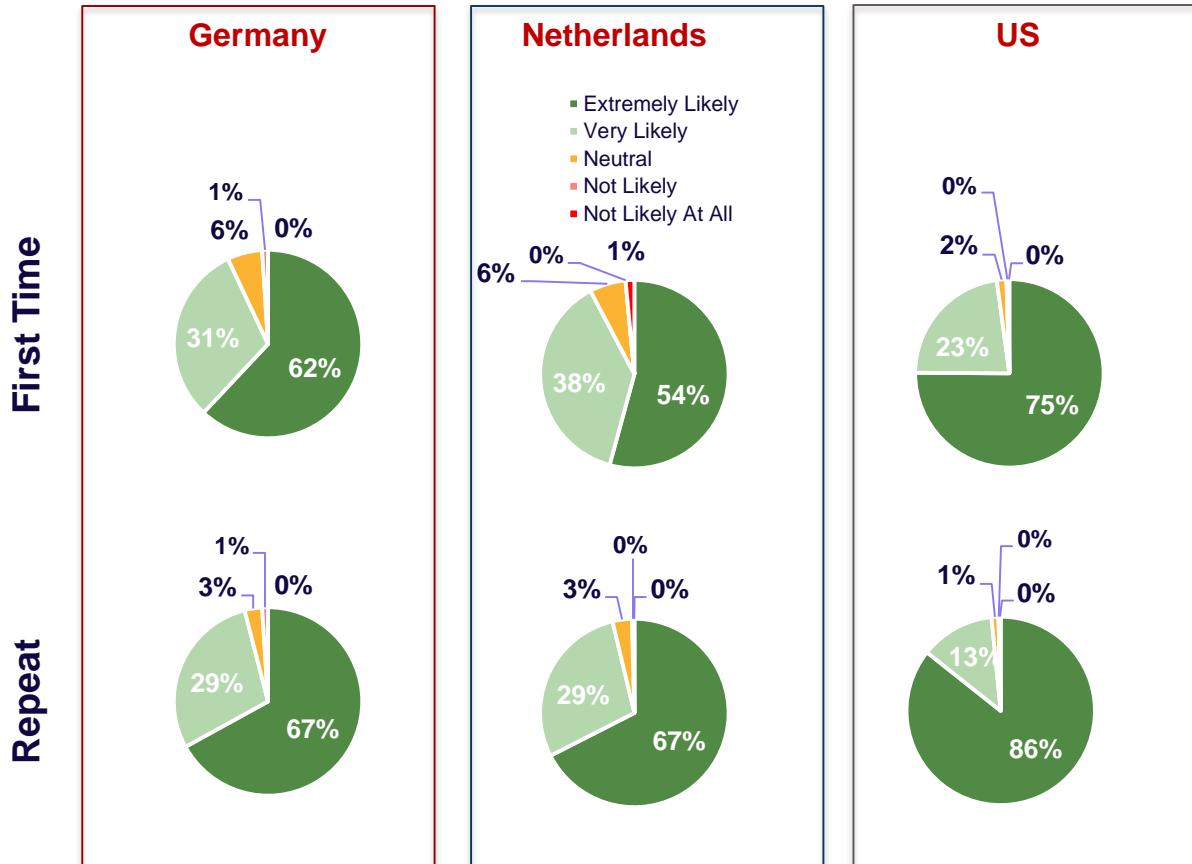


Seasonality

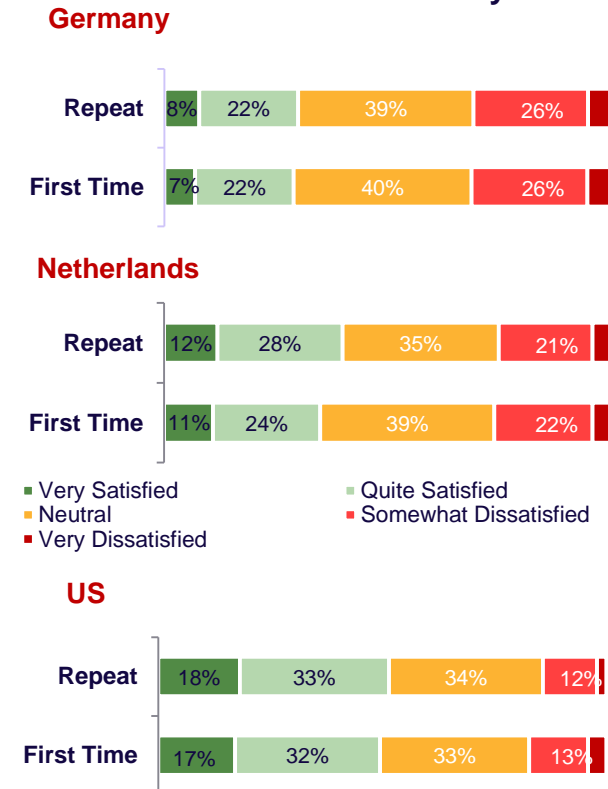


Repeat visitors unsurprisingly are more likely to recommend. There is very little difference in perceptions of value for money between First Time and Repeat Visitors

Recommendation



Value for Money





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Insight

Travel and Transport Gateways & Open Jaw

The Journey as part of the Experience

Getting to England and travelling along The Great West Way experience provides both opportunities and challenges

Gateways

- The two primary gateways for The Great West Way are Heathrow and Bristol.
- The two airports clearly offer a very different position in terms of flight route availability, airport experience and proximity to experiences along The Great West Way
- Heathrow allows for combination of The Great West Way itinerary with a stay in London. It also allows for greater connections for travellers touring multiple countries
- Bristol offers a more 'personal' experience that has potential to be positioned as start of the journey experience

Journey along the route

- Self-drive and public transport are potential transport options, as are more tailored options – taxi, minibus etc. Turning standard forms of transport into part of the experience will require strong messaging and itineraries that make the routes appealing
 - More 'unusual' forms of transport (cycling, boat etc.) provide more by way of experience and speak to the 'Pursuit of Real' trend, but may be more niche in their appeal
- * Whilst cycling and boating have been included as experiences within current research, they have not specifically been explored as 'transport'. Some analysis from other DEF projects that focus on cycling, boating and walking is included within the appendix

The Final Mile

- It is easy to under-estimate the importance of the simple journeys and clear solutions for the 'final mile'
- For example the lack of detailed information for the journey from the railway station to the final destination is a barrier to international travellers, for a variety of reasons:

Lack of knowledge and understanding of England beyond London (geography, distance etc.)

There is a tendency to over-estimate journey times between major destinations, which will add to the level of concern

We drive on the 'wrong' side of the road, adding an additional challenge to self-drive

For public transport, concerns are around information (where trains go from and to)

For those where English is not the first language there is a further barrier/concern

All this leads to a lack of confidence travelling in England

Bristol airport accounts for less than 1% of inbound visitors from the target markets. Whilst this allows for scope to grow, the connections are currently limited

Country of Origin	Share of holiday visitors coming in to England via....	First Time	Repeat
Total	Bristol	1%	1%
	Heathrow	29%	36%
Germany	Bristol	<1%	<1%
	Heathrow	17%	28%
Netherlands	Bristol	1%	1%
	Heathrow	8%	7%
US	Bristol	<1%	<1%
	Heathrow	57%	65%

The low Heathrow numbers for Netherlands reflect the greater number of gateways (around ¼ of German and Dutch visitors come to Britain via sea ports) – both air and sea (and some rail as the new Eurostar service gets established).

It appears from this that there is a slightly greater tendency for repeat visitors to come in via Heathrow for Germany and US.

*warning – low base sizes throughout this analysis

Implications

- Heathrow provides greater flexibility for visitors from all countries
- Circular routes may be preferable to A2B (Open Jaw) routes
- Itineraries starting and finishing in London would be preferable for the c. one quarter of Germans/Dutch who come by sea/tunnel.

Bristol Airport

- Daily options are limited to Amsterdam, Dusseldorf, Frankfurt, Hamburg and Munich.
- Of the airlines flying from Bristol only KLM also flies from Heathrow – meaning Open Jaw flights would be with different airlines as well as the different airports. This may impact ability to book and/or price.

Flights to Netherlands

- Direct flights to Amsterdam (several daily) – KLM & EasyJet

Flights to Germany

- Direct flights to
- Berlin (not daily) - Easyjet
- Cologne (not daily) - Ryanair
- Dusseldorf (daily) – Fly BMI
- Frankfurt (several daily) – Fly BMI
- Hamburg (daily) – Fly BMI
- Munich (twice daily) – Fly BMI

Flights for US Visitors

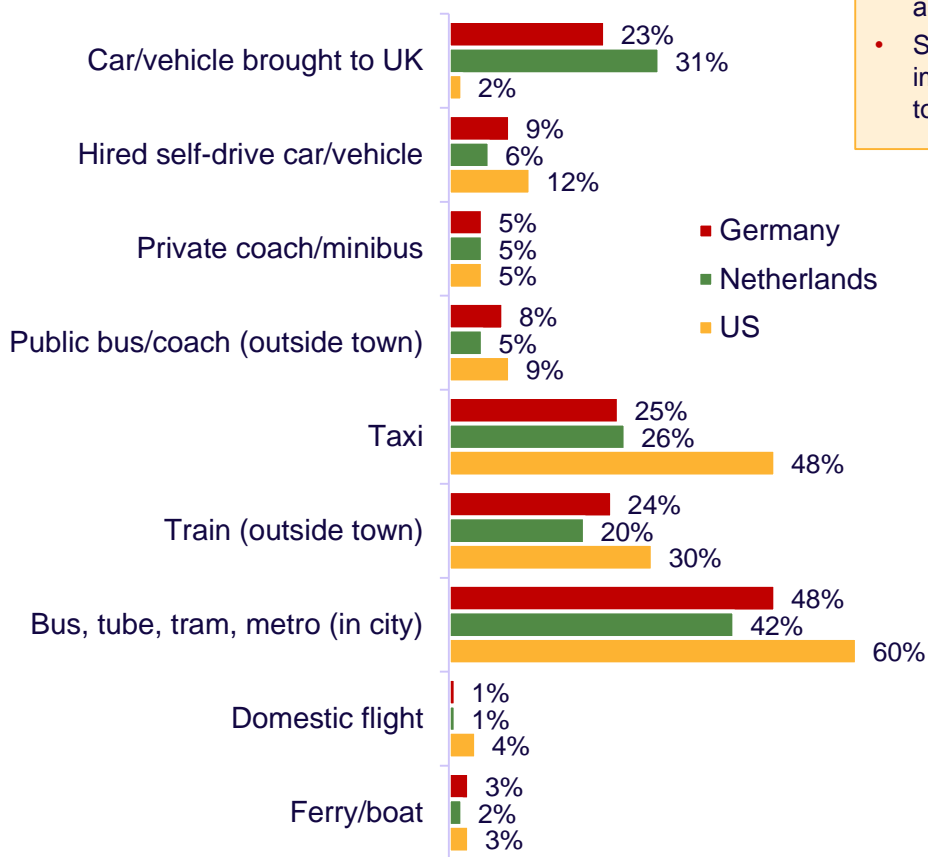
- There are no direct flights so US visitors coming directly from US will typically travel via Heathrow.
- However, 33% of US visitors go to another country as well as Britain either before and/or after. For these people routes to Bristol from other European countries becomes an option

Holiday Visits to another country	US
....Only before UK	10%
....Only after UK	14%
....before and after UK	9%

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

Use of personal transport is quite high for the European target markets, but public transport is frequently used, especially by US visitors

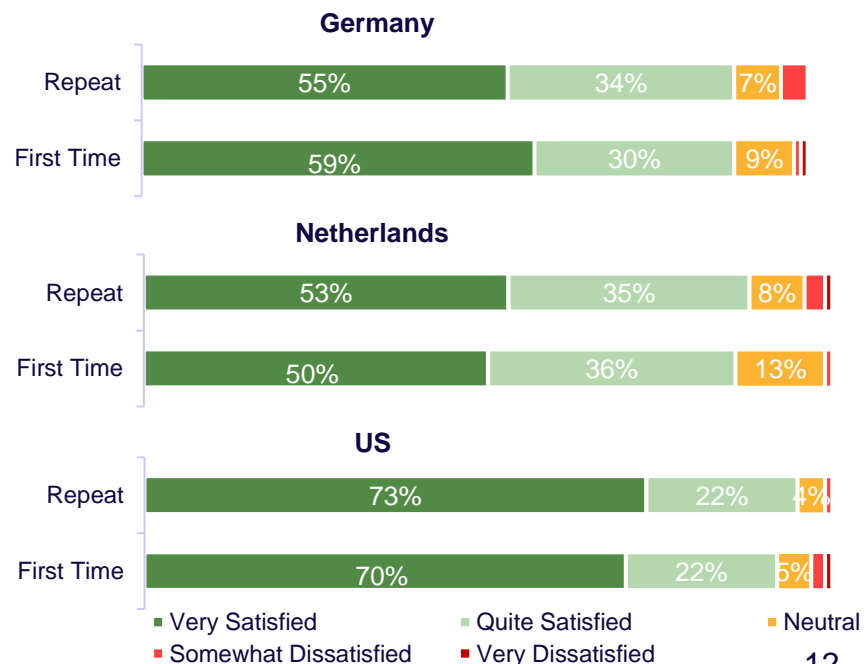
Modes of Internal Travel in UK used (all visitors)*



Implications

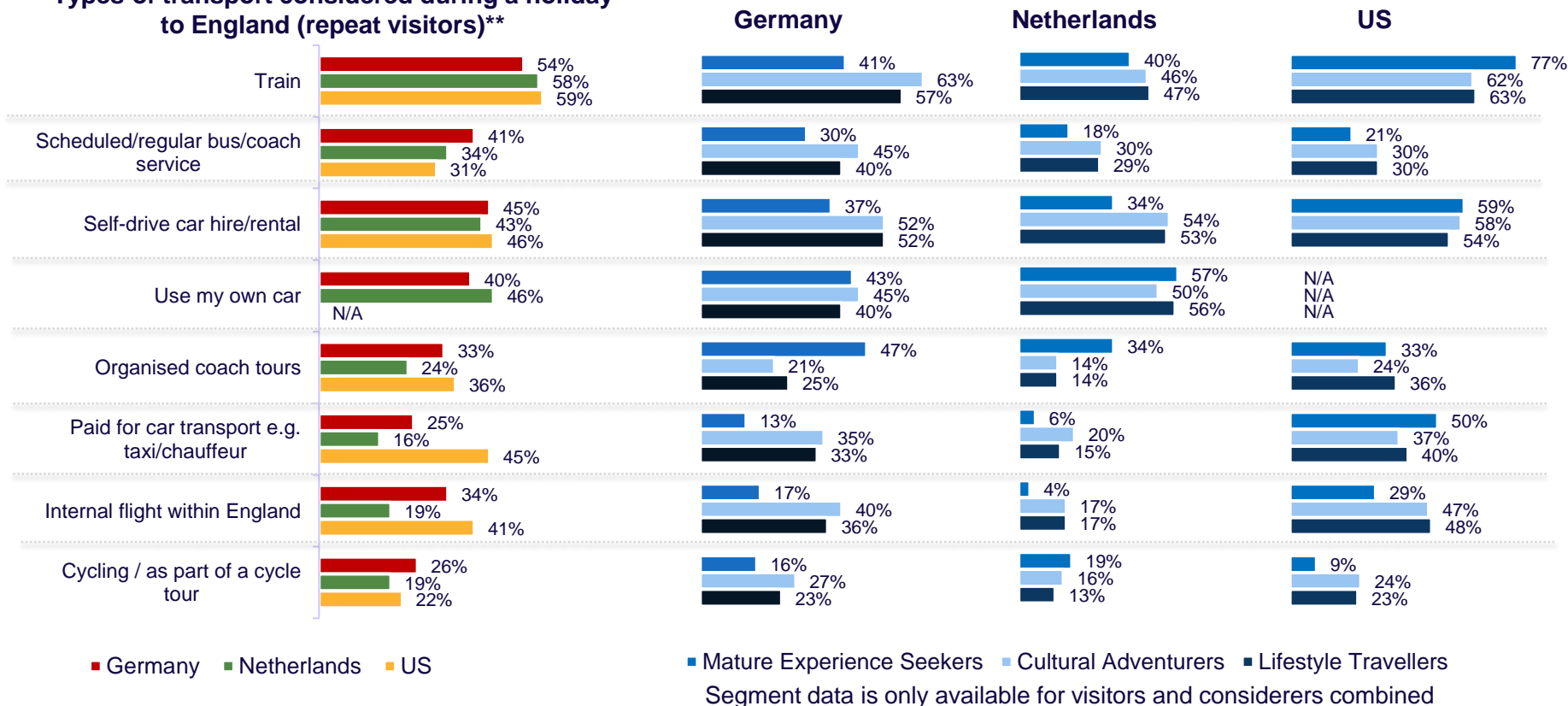
- Main transport options may need to vary by target country. The Germans and Dutch are more inclined to self-drive, while visitors from US look for a 'managed solution' using public transport and/ or taxis.
- Satisfaction with public transport is quite high, but there is scope to improve. Providing very clear instructions on tickets, routes etc. will help to improve ratings and address travel concerns

Satisfaction with Public Transport***



Consideration of transport types shows a willingness to consider a variety of alternatives, particularly among visitors from US

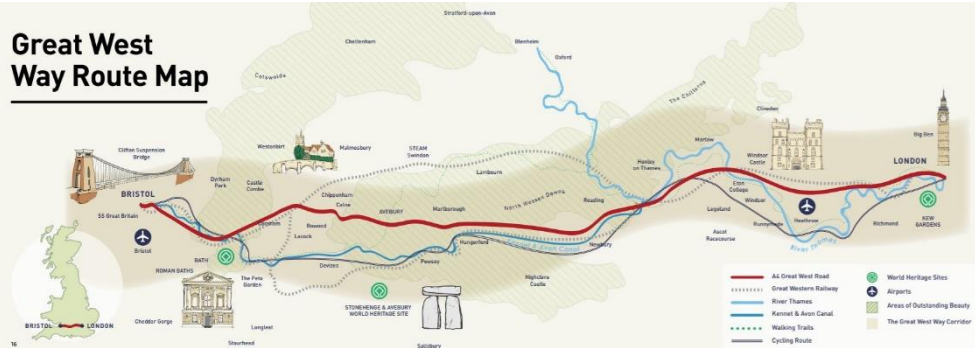
Types of transport considered during a holiday to England (repeat visitors)**



Implications

- Public transport is a popular option for all countries and across most segments.
- Mature Experience Seekers are more conservative in their transport considerations and are more likely to consider organised coach tours.
- It is notable that up to a quarter would consider cycling and for Germany and US this is mainly among Cultural Adventurers and Lifestyle Travellers

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



A need for focus

- The route map gives a wide variety of sights and places to visit along the 125 mile corridor.
- The Great West Way team will need to produce focussed itineraries grouping sights/places and showing travel times/options between each place to help visitors visualise what they could expect to experience.
- Journey options need to be shown/planned in order to maximise the time spent doing what the visitor wishes – which may be the long, meandering journey, but may be time spent visiting the sights. Peak season traffic will significantly add to journey times by road.

Road/ Train	Bristol	Bath	Stonehenge*	Malmesbury	Windsor
Bath	50 mins/ 15 mins				
Stonehenge	1h 30m/1h 20 to Salisbury	1h/ 1h			
Malmesbury	45m/ 1h 30m train+bus	50m/ 1h 30m train+bus	1h 15m/ 55m		
Windsor	2h/ 2h 30m	2h 40m/ 2h 30m	1hr 55m/ 1h 55m	1h 30m/ 2h 45m	
London (Westminster)	2h 30m/ 2h	2h 30m/ 2h	2h/ 1h 45 from Salisbury	2h 15m/ 2h 45m	1h/ 1h 15m

* Journey times calculated out of season

Open Jaw vs Circular Routes

- Airport routes and airlines for Bristol and Heathrow suggest a circular route in and out of the same airport may be preferable. However, journey times along the Great West Way point towards linear routes being preferable, to minimise travel time during the holiday.





PASSES

TICKETS & RESERVATIONS

TIMETABLES

EXTRAS

Product

BritRail South West – Travel throughout Great Britain’s charming Southwest region to popular destinations including: London, Bath, Oxford, Windsor Castle, Salisbury Cathedral, King Arthur’s round table in Winchester and any stop in between.

Scope

Coverage

Length pass is valid for

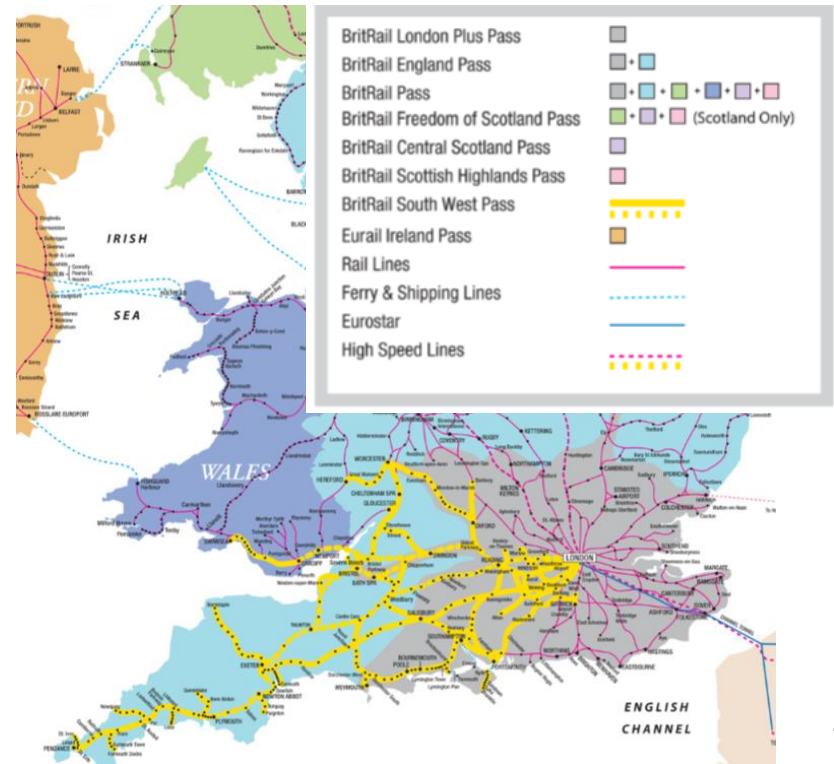
Discounts: Low season, group, family, youth, senior.
241 on attractions.

Most mainline and branch line carriages operated by First Great Western, South West Trains and Heathrow Express trains

3 days – 1 month consecutive
3 – 15 days flexi within 1-2mths

Flexible	Standard Class	First Class
3 days within 1 month	123.00 EUR	177.00 EUR
4 days within 1 month	149.00 EUR	220.00 EUR
8 days within 1 month	213.00 EUR	320.00 EUR
15 days within 2 months	320.00 EUR	476.00 EUR
Consecutive	Standard Class	First Class
3 days	96.00 EUR	145.00 EUR
4 days	117.00 EUR	177.00 EUR
8 days	170.00 EUR	252.00 EUR
15 days	252.00 EUR	373.00 EUR
22 days	316.00 EUR	470.00 EUR
1 month	373.00 EUR	555.00 EUR

- Fully functioning website which allows visitors to directly **book BritRail passes in their local currency**
- Website content **fully translated to German**
- **Flexibility in the length of pass** you can buy – consecutive use pass or set number of days you can travel over 1-2 months
- Good reviews among users
- Advertised on VisitBritain website





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Insight

Tours and Multi-destination



Encouraging visits to The Great West Way will start from raising awareness and curiosity in what the region has to offer

- The region performs well currently in comparison to other regions in terms of volume of visitors, however there remains a considerable lack of awareness and understanding of what is on offer. The strong narrative that both informs and inspires (such as the example below) will provide a strong foundation for the communications
- Currently, only a small proportion of holidays to England are tours/multi-centre, so the aim will be to both communicate the appeal of tour and specifically The Great West Way

The Great West Way Wander through the Wonders

The Great West Way is a journey of discovery. It links the world-famous with the yet-to-be-discovered. Wonder at England's icons and go further.

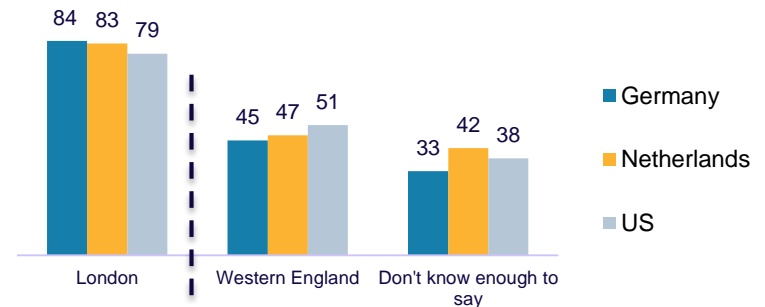
To meet the people and see the places with new stories to tell. Be amazed by English jewels like Bath, the Cotswolds and Windsor and delve deeper. To uncover the gems that make your journey a memory you'll want to share. Perfect settings like Marlow and Malmesbury. The historic market town of Bradford on Avon. Bristol, the home of England's spirit of discovery and creativity.

Become an England insider. Find the path less trodden but no less fascinating.

The Great West Way is a route without routine, where the journey matters just as much as the destination.

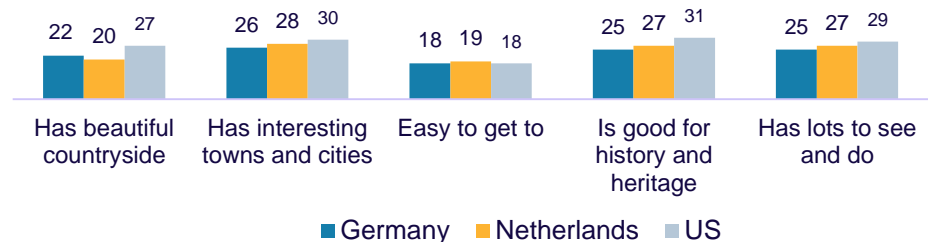
Heavenly Group Ltd

Interest in visiting England's regions (% Definitely/quite like to visit)*



Example places cited: e.g. The Cotswolds, Oxford, Bath, Bristol

Agreement with statements about Western England* (% Strongly & somewhat agree)



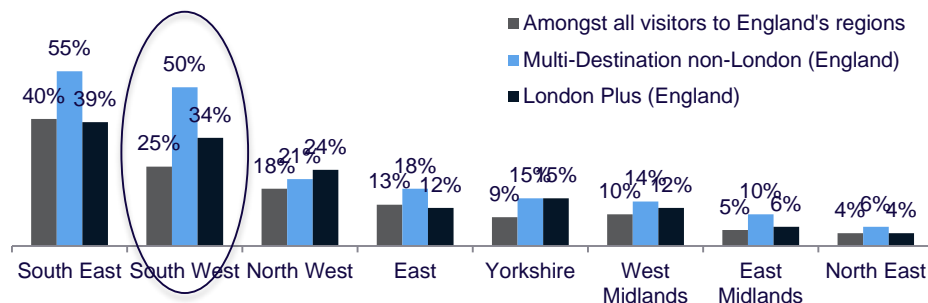
Implications:

- Interest in visiting the West of England is quite high, though many of those not interested simply don't know enough about the region
- Communications that are both educational and persuasive will be needed to encourage people away from London, both in showcasing the offer as well as demonstrating easy transport links.
- The lack of knowledge is reflected in the assumptions about the region. Less than one in 5 currently believe the West of England to be easy to get to and so positive, informative communications will be needed to educate and reassure

Multi-destination holidays account for 9% of inbound visits to England, which presents an opportunity and a challenge for the Great West Way team

Regions stayed in by England multi-destination holiday visitors

Base: Holiday visitors from all inbound countries

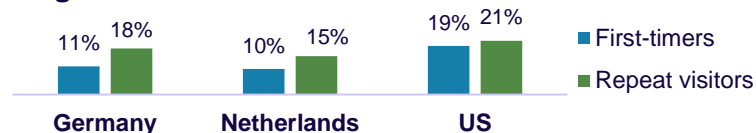


- The South West out-performs in terms of multi-centre, so there is some awareness and experience to build from.
- Visitors from US are most likely to stay in more than one region and the proportion is slightly higher among Repeat Visitors
- Whilst only 11% First Time Visitors from Germany stay in more than one place in UK, that increases to 18% among Repeat Visitors.

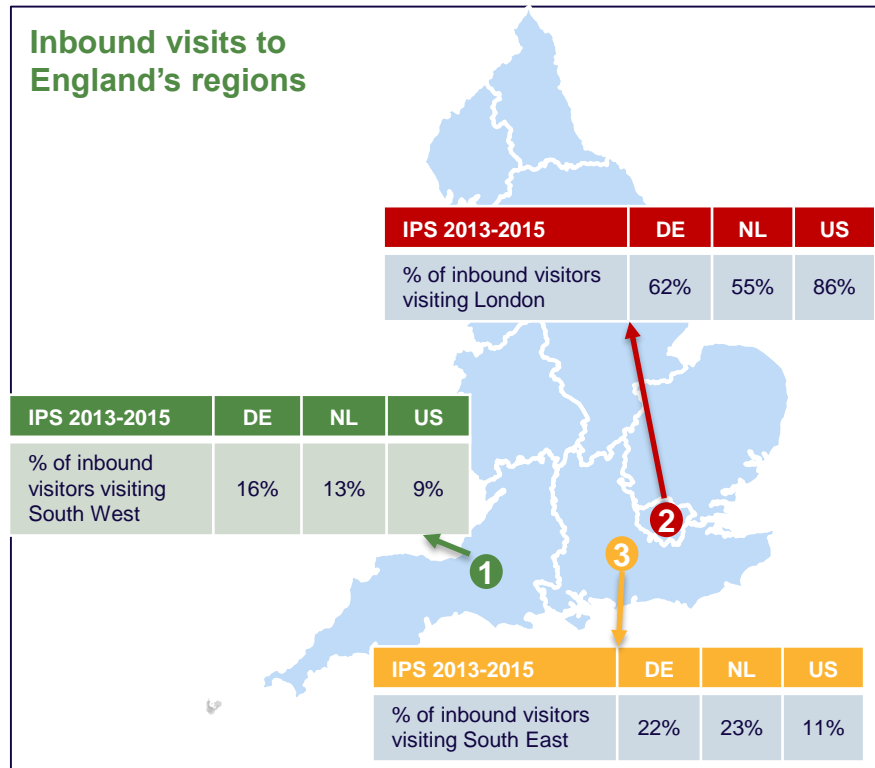
Implications:

- Multi-destination holidays represent a very small proportion of visits to England currently which presents a strong market opportunity.
- The primary challenge is to get visitors to go beyond London to the South West, the secondary challenge is to encourage them to visit multiple destinations along the Great West Way route as overnight stops, not just day trips.
- The product needs to resonate emotionally to encourage visitors and be sufficiently different to stand out from other market destinations.

% who stayed in more than one region in the UK



Inbound visits to England's regions





How to differentiate and optimise the Great West Way Opportunity



Itineraries that include a variety of activities and experience will appeal, particularly when connected by a theme or story

Interest in England	Germany	USA
Getting off the beaten track	64%	66%
Train to travel from place to place	44%	66%
Rent a car	53%	52%
Day trips	65%	63%
Full guided tour	39%	52%
Planned itinerary	40%	53%

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

Travellers want 'off-the-beaten track' experiences, but are also interested in guided tours and planned itineraries, suggesting the appeal of 'safe exploration'.

The trade perspective and traveller interests in specific activities and themes can be addressed through the itineraries and how they are communicated, as illustrated in the example narrative – A Journey in Time

The Great West Way A Journey in Time

Travel England's first great historic route. 125 miles long and centuries in the making. Journey past turnpikes, tollhouses, canal locks and coaching inns as you voyage through time. From the dawn of history to today's towns and cities brimming with things to do, around every corner you'll discover how time has shaped the character of England's Great West Way. Touch ancient history at Avebury, immerse yourself in Roman Britain at Bath, and walk in the footsteps of Kings and Queens at Royal Windsor. Journey on the Kennet and Avon Canal and the Great Western Railway – the arteries which made England the first modern nation. Arrive in Bristol Airport or Heathrow and you'll be on the Way in no time. There's no time like the present: let England come alive today. Don't just read about it - touch it, taste it, ride it, live it.

Heavenly Group Ltd

Initial Travel Trade feedback identified a number of focus areas that can be explored in more detail from the traveller perspective

Create bookable, cohesive, story-led itineraries
Include a mix of iconic and 'off-the beaten track' experiences
Address the concerns around transport and accommodation

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.

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.
- Want more cohesion in regional products and more proactive development – information & genuine packages.

US

- Looking for new experiences and destinations. Consumer data driven & unlikely to develop new product / packages unless proven consumer demand.
- Demand is for 'off the beaten track' and authentic experiences - "sightdoing not sightseeing".
- Accommodation outside London seen as an issue – availability, value and consistency of pricing.
- Lack of awareness beyond London makes it hard to sell regional England.
- Public transport is an issue – nervousness about travelling around England.
- Want bookable package products that include all travel and accommodation and themed products.

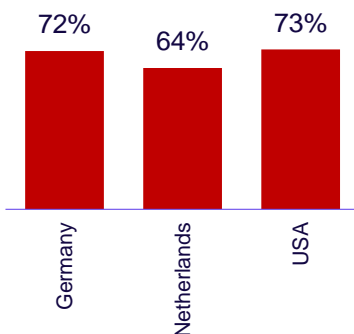
Two general tourism trends are particularly relevant when constructing itineraries for the Great West Way

Future Traveller Trend

#The Leisure Upgrade

Skill-seeking future travellers will prefer tourism products that combine fun and an opportunity for learning or self-improvement.

“Entertainment should be about learning new things as much as simply having fun” | % who agree strongly or agree

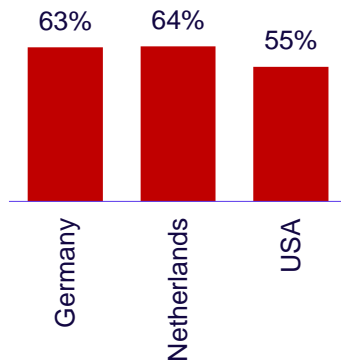


Future Traveller Trend

#Pursuit of Real

Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

“When I go on holiday, the most important thing for me is to experience the authentic culture of a place”
% who agree strongly or agree



These trends align well with the Visitor Benefits identified for the Great West Way.

Rational Benefits	Emotional Benefits
Concentrated	Exploration
Choice	Enrichment
Connected	Empathy

Whilst there is a need to include iconic and historic destinations it is important also to ensure that the experiences are immersive.

The journey between destinations can also add to the ‘real’ experience – hands-on boating, historic trains etc.

“Don’t put everything into a glass box and expect people to come, because they will just be bored. If you look at the average consumer today, they are more demanding, more sophisticated, more culturally aware, have travelled further. There is built heritage, natural heritage and cultural heritage. Cultural heritage is all about people and food and wine and that one has become more important than the others. Culture is no longer dead, the cultural is alive and that experience economy is driving everything”.

IAN YEOMAN, TOURISM FUTURIST

Concept testing Germany and US

Concept Tested

Follow the paths taken by generations of travellers and discover an essential strand of England.

Based on one of the first Great Roads commissioned by the Kings of England, the Great West Way winds its way through lush green landscapes filled with the world-famous and the yet-to-be-discovered. Touch Royal Windsor, Roman Bath and timeless Stonehenge, immerse yourself in English village life and Bristol's city energy.

On the Great West Way, extraordinary history rubs shoulders with everyday life. Traditional pubs and inns with World Heritage Sites on their doorsteps, serving craft ales and local farm food. Churches which have watched over their parishes for centuries. Independent shops and galleries filled with contemporary designs and creations.

You don't have to travel far to explore further and delve deeper into England. The Great West Way links London with Bristol through 125 miles of twists and turns and new discoveries. Explore by road, by railway or by waterway. Slow right down, base yourself along the route, walk it or cycle it.

Welcome to the real England. It's England undiluted. It's England concentrated.

'England Concentrated' – presenting an extraordinary variety of attractions and experiences in an easily accessible compact area.

Search terms that would be used to find this type of holiday



To know the real life of England; Also not so well-known sights and landscapes

The freedom to decide where to stop when and how long to stay

Easy to drive and stop where you want

Positive take-outs

- Stonehenge is recognised by both markets as an appealing element of the concept (also Bath for US). This illustrates the need for a 'big name' in the communications to draw people in
- The key additional benefits seen in the concept were the **variety**, **authenticity** and **Englishness** of the experience

Accommodation in hostels and staying with other holidaymakers

Uncertainty, boredom, unfriendly people

Concerns

- Price perceptions particularly in Germany
- Some concern also around accommodation and a perceived lack of flexibility

Would certainly be price-intensive

Too little independent action

Implications

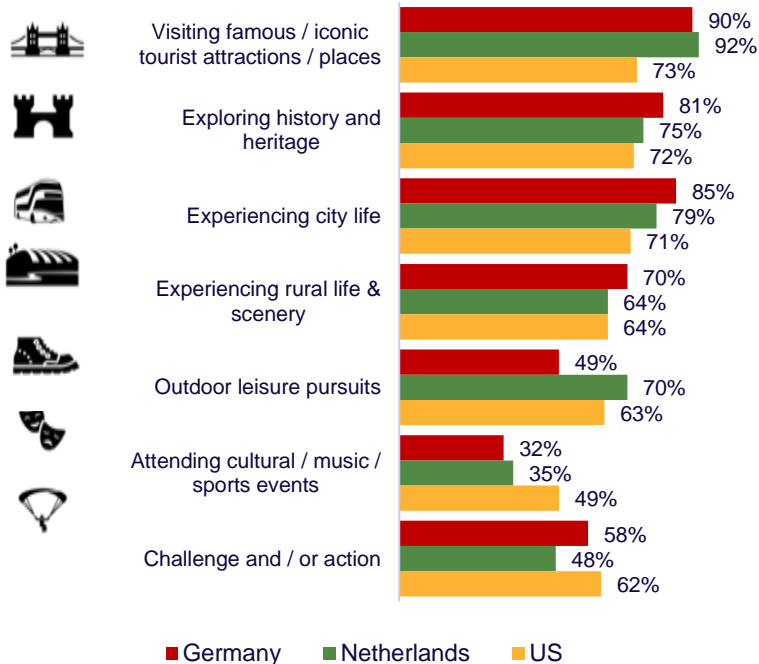
- The Search words (left) illustrate the similarities in the two markets with Stonehenge, Bristol and London featuring, though some differences in the accompanying associations. This analysis will help with positioning and language used within the communications
- This was the first stage of the concept testing and as the Narratives have been developed they build on the key motivating messages.
- It is understood that further concept testing is currently taking place



How to differentiate and optimise the Great West Way Opportunity **Themes & Activities**

The Motivating Messages for The Great West Way can be reflected in the choice of experiences and the connections between them

Activity likelihood (would/very likely do) in England (repeat visitors)*



The interest in a wide range of activities has been well-documented.

Building cohesive stories for travellers across both the famous and less well known activities will strengthen the Great West Way 'brand'.

This narrative will be important both in the marketing activity around the product and during the holiday itself, in order that the traveller feels part of a complete experience rather than a trail of individual attractions.

Motivating GWW Messages Summary



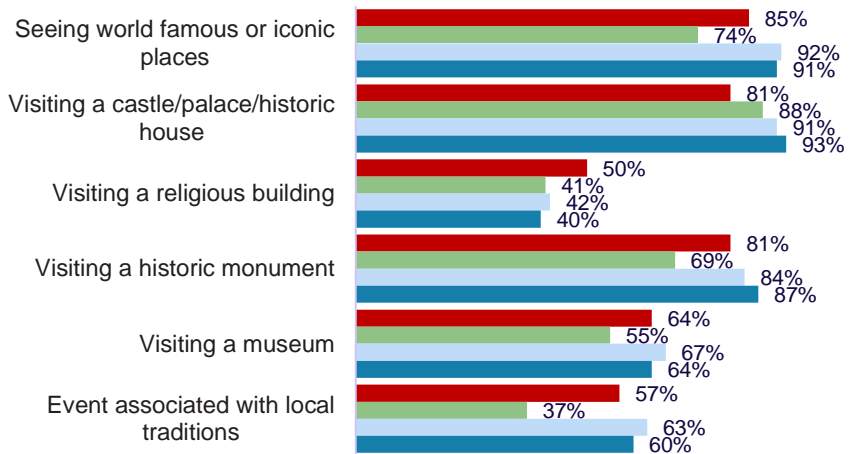
Heavenly Group Ltd

Differences between the markets show the importance of testing itineraries and concepts in-market prior to launch. The following breakdown of 'Activities' is split out into individual markets to allow the Great West Way team to look in greater depth for developing communications priorities.

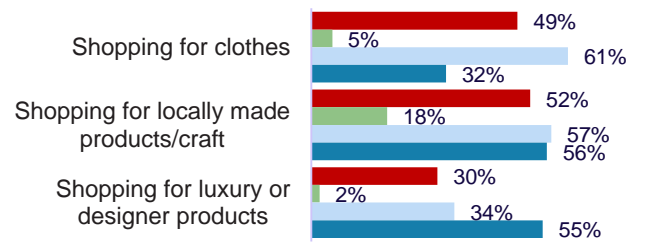
GERMANY: Besides visiting the famous and historic sites, Germans are most interested in parks/gardens, short walks and exploring villages

Living history

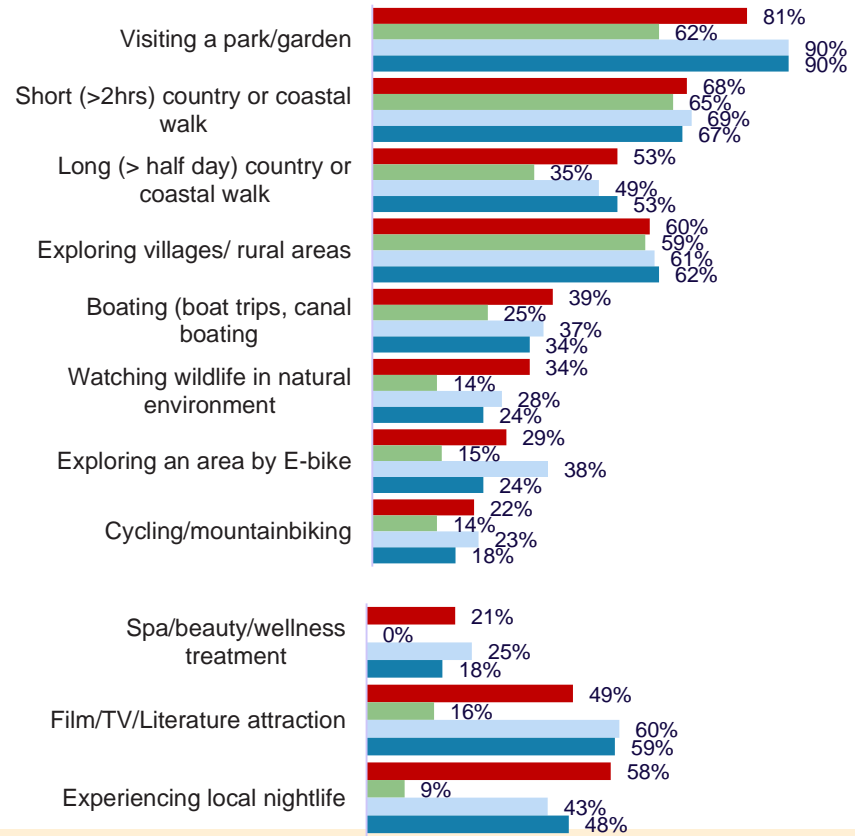
Germany (repeat visitors) Mature Experience Seekers
Cultural Adventurers Lifestyle Travellers



Shopping



Outdoors/nature pursuits



- Iconic destinations such as Windsor, Bath and Bristol are important for all segment groups
- The market level interest in parks/gardens can be exploited through promotion of Kew Gardens on the itinerary. Malmesbury/the Cotswolds or other villages along the route should be of interest and can be combined with a pleasant country/canal walk.
- The interests of Lifestyle Travellers and Cultural Adventurers are broadly similar, while Mature Experience Seekers generally show lower interest in activities overall.
- Cycling and boating are of little interest to the majority, however Cultural Adventurers rate these activities higher than the other target groups.
- Lifestyle Travellers may be interested in the Swindon Designer Outlet due to their interest in luxury or designer shopping.

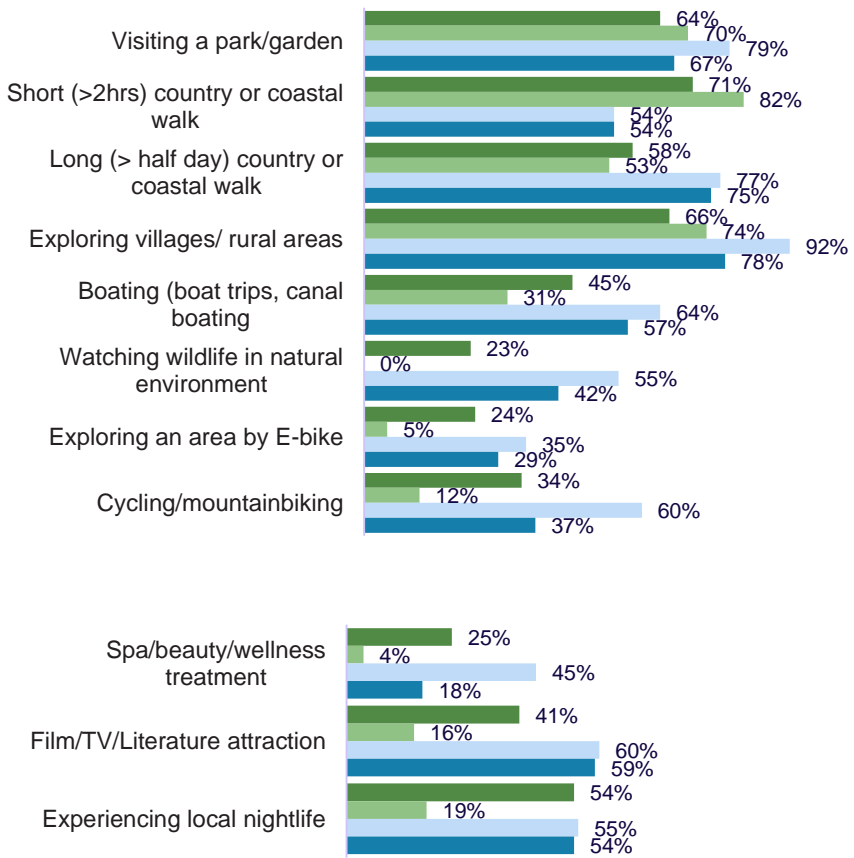
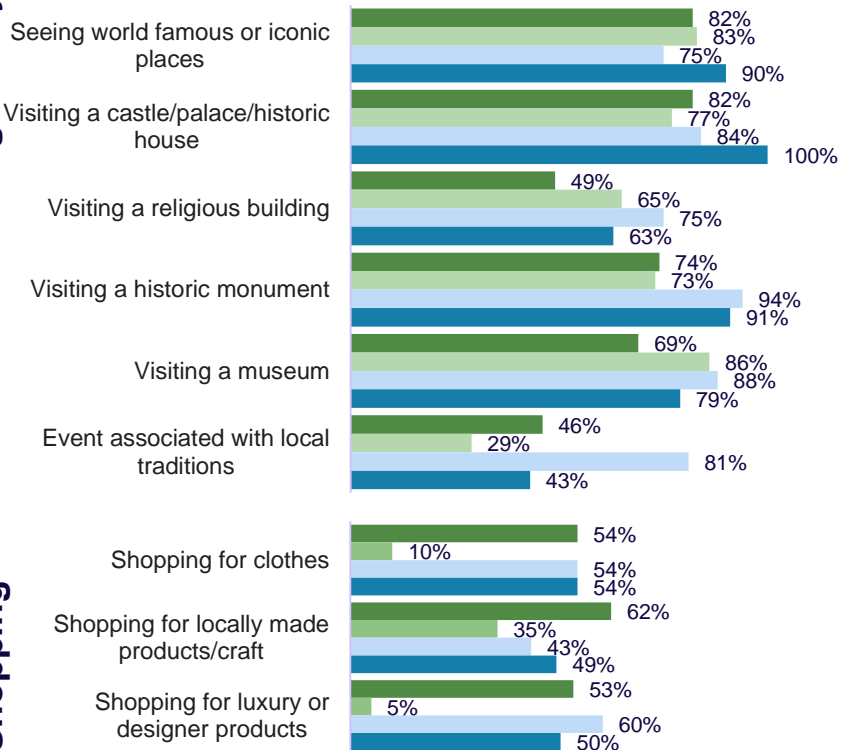
NETHERLANDS: Besides visiting the famous and historic sites, Dutch visitors are most interested in short walks and exploring rural villages

Living history

Shopping

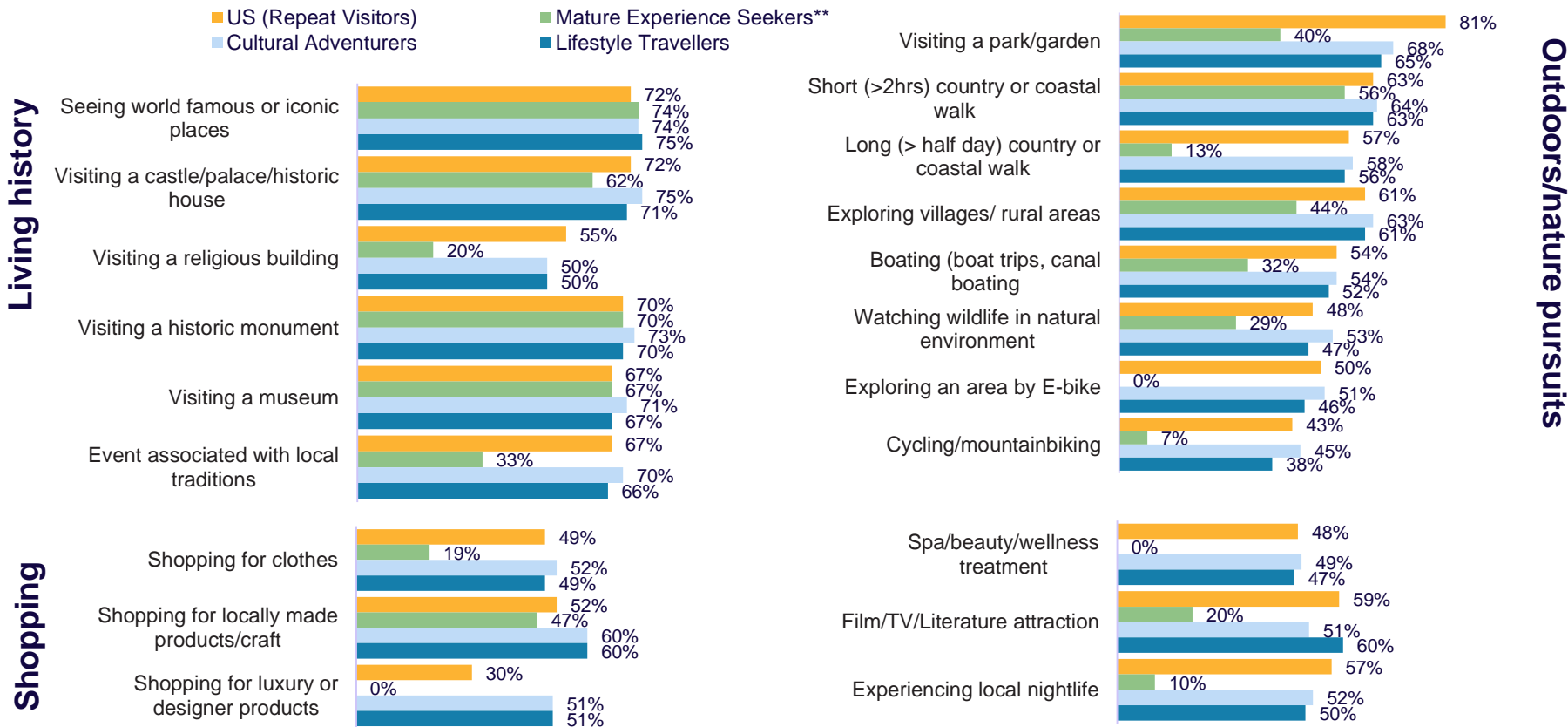
Outdoors/nature pursuits

■ Netherlands (Repeat Visitors) ■ Mature Experience Seekers*
■ Cultural Adventurers* ■ Lifestyle Travellers



- Iconic destinations such as Windsor, Bath and Bristol are important for all segments groups.
- The market level interest in short walks and villages presents plenty of opportunities for the Great West Way route and can be combined with shopping for local craft products. Parks/gardens can also be harnessed through Kew Gardens and other country estates and parks along the route.
- Cultural Adventurers show the most varied interest in activities, including cycling/mountain biking and boating. They also show highest interest in shopping for luxury products – the Swindon Designer Outlet could be a potential itinerary addition for this group.

US: The highest interest for US visitors is parks/gardens. Interest in history can be seen through 'tradition' – interest in museums, local villages and local traditional events



- Iconic destinations such as Windsor, Bath and Bristol are important for all visitors
- The market level interest in parks/gardens can be exploited through promotion of Kew Gardens on the itinerary. Malmesbury/the Cotswolds or other villages along the route should be of interest and can be combined with a pleasant country/canal walk. It is worth looking to add local events (maypole dancing, carnivals, village fairs/other events etc.)
- The interests of Lifestyle Travellers and Cultural Adventurers are broadly similar, while Mature Experience Seekers generally show lower interest in activities overall (apart from visiting famous/historic attractions and museums).
- Cycling and boating are of higher interest to US than German or Dutch. Cultural Adventurers rate these activities higher than the other target groups.
- Lifestyle Travellers and Cultural Adventurers may be interested in the Swindon Designer Outlet.



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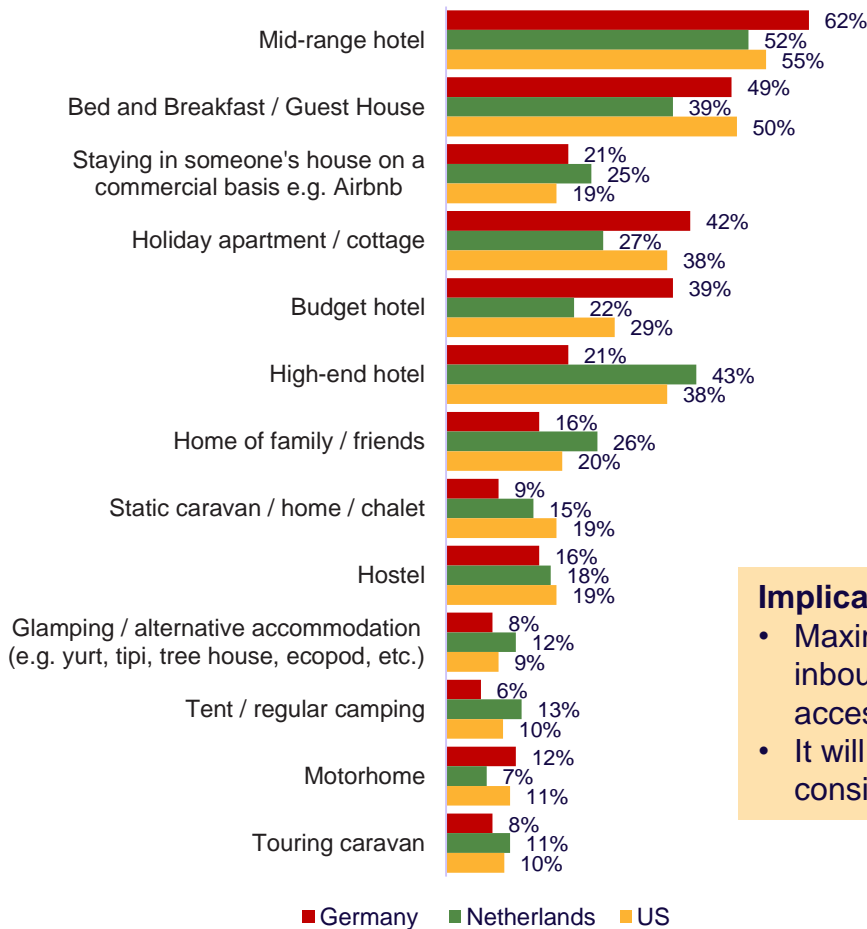
Insight

Accommodation



Types of accommodation considered illustrates the potential for growth of a range of diverse options

Types of accommodation considered as part of a holiday to England (repeat visitors)

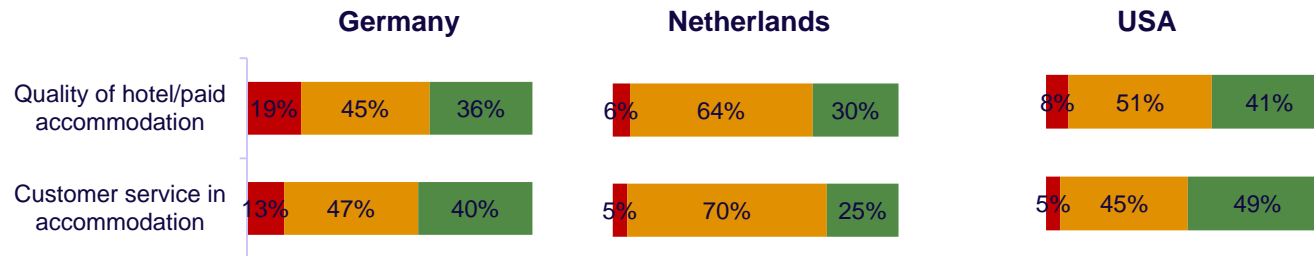


- Whilst hotels are overall the most considered accommodation option, there is clearly potential for others.
 - Germans and Americans are the most likely to consider a holiday apartment.
 - The interest in camping is highest amongst the Dutch and it is reasonable to assume this will grow particularly as glamping options increase.
- Mid-range hotels are most popular but there is still a significant minority interested in high end (especially Netherlands and US) and/or budget hotels (Germans).

Implications

- 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.

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



The 19% in Germany who say 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

Accommodation suggestions for overseas visitors need to be carefully chosen to reflect the expected standards and should be monitored to ensure quality standards are maintained.



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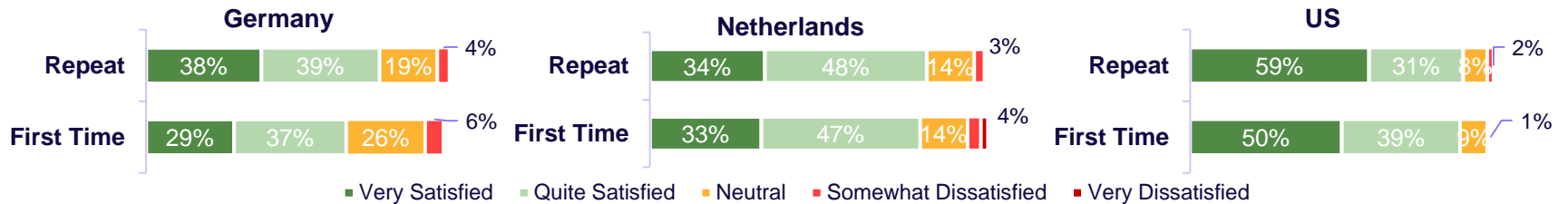
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Food & Drink

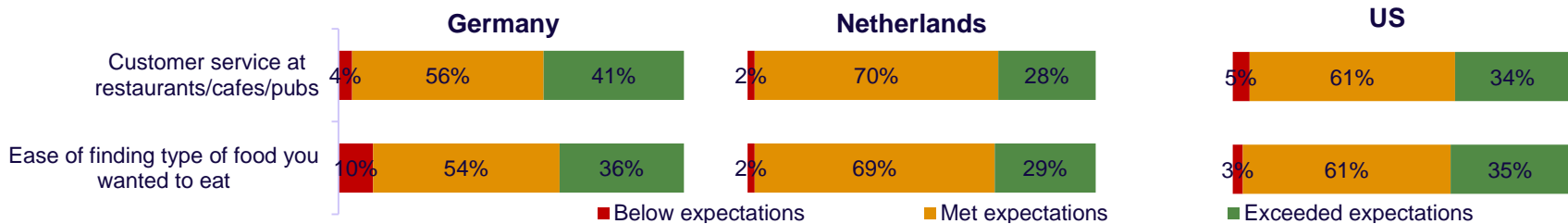


Visitor satisfaction with the food and drink offer is high and expectations are often exceeded

Satisfaction with Food & Drink among visitors to Britain*



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



Implications

- Satisfaction with food and drink is generally high; German and US repeat visitors are more satisfied than first-timers.
- Up to a third of visitors say that service levels in restaurants exceeded their expectations and that they were able to find the type of food they wanted to eat. 1 in 10 Germans said they struggle to find the type of food they would like to eat.
- Itineraries need to provide links/suggestions to a variety of food outlets to give visitors a choice. If restaurants are being suggested in an itinerary, food quality and customer service standards need to be monitored to ensure they meet the expected levels.

“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



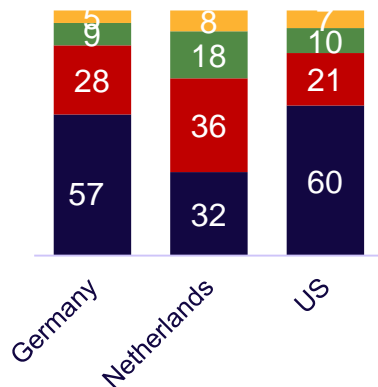
Path to Purchase



The planning process: The length of the booking process varies greatly by market and by age for repeat visitors; the lead time to booking is longest in Germany and the US and shortest in the Netherlands. Timing of marketing campaigns will need to reflect this

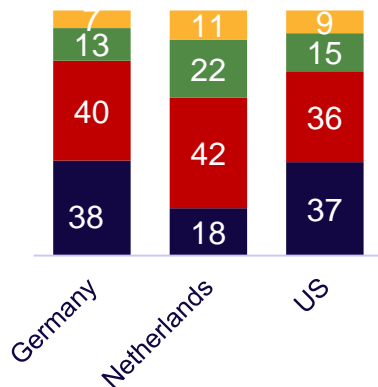
Started thinking about their trip (%)

- Over half of those in Germany and the US started to think about their trip at least 6 months in advance.
- In the Netherlands a third started thinking 6 months in advance, and a third between 3 and 6 months.



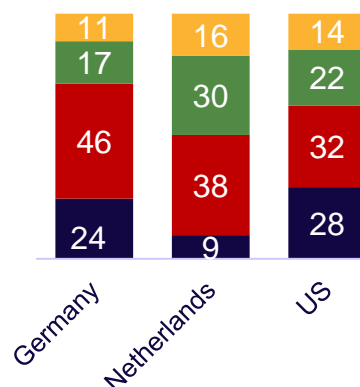
Decided on the destination (%)

- Typically between 3 and 6 months prior to the visit.
- Although German and US visitors to England may well have decided more than 6 months in advance.



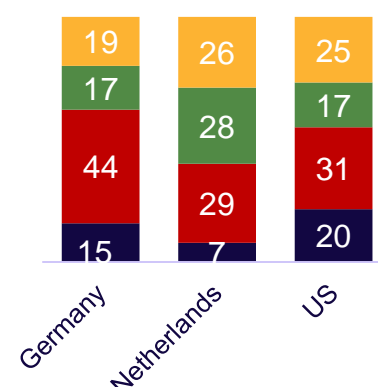
Looked at options / prices (%)

- Typically between 3 and 6 months in Germany and the US.
- In the Netherlands many start to review options / prices in the last 2 months. 26% of those travelling from the Netherlands do not do any price comparisons.



Booked the trip (%)

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

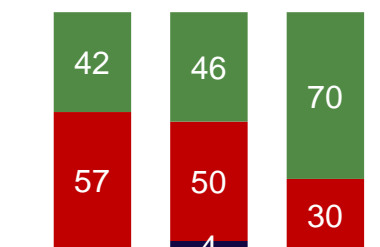


Making the booking: Travel and Accommodation is often booked separately, apart from the US where it is more likely a package

Travel & Accommodation Booking

(visitors to Britain)

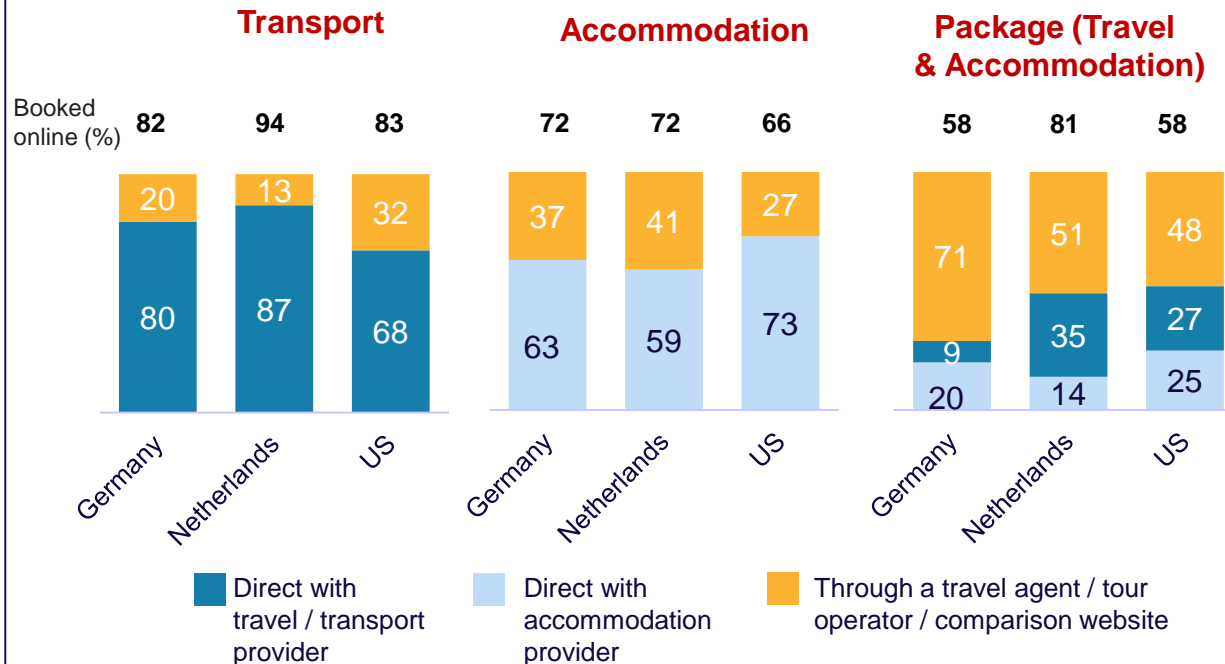
- 70% of those in the US booked their holiday to Britain as part of a package.
- The European markets are more likely to book travel and accommodation separately.



- Booked travel & accom together
- Booked travel & accom separately
- Don't know

Channel used to book trip elements (visitors)

- Typically when transport and accommodation are booked separately, they are booked direct with either the travel / transport provider or direct with the accommodation provider.
- Package holidays are typically booked through travel agents.
- The majority of trips to Britain were booked online, especially in the Netherlands.



The decision-making process relies on a wide range of information and inspiration sources, highlighting the need for a multi-channel marketing strategy

- There are considerable differences in the purchase journeys of travellers from Germany and US.
- Americans are much more likely to visit a travel agent in person, but also to make more use of social media and online blogs
- In contrast the Germans use OTAs more, particularly in the early stages of the decision making process – this points to a need to have inspiration content available through these channels
- The Germans will also use ‘official’ resources- tourism boards, brochures and other printed guides throughout the booking journey including the time between booking and travel

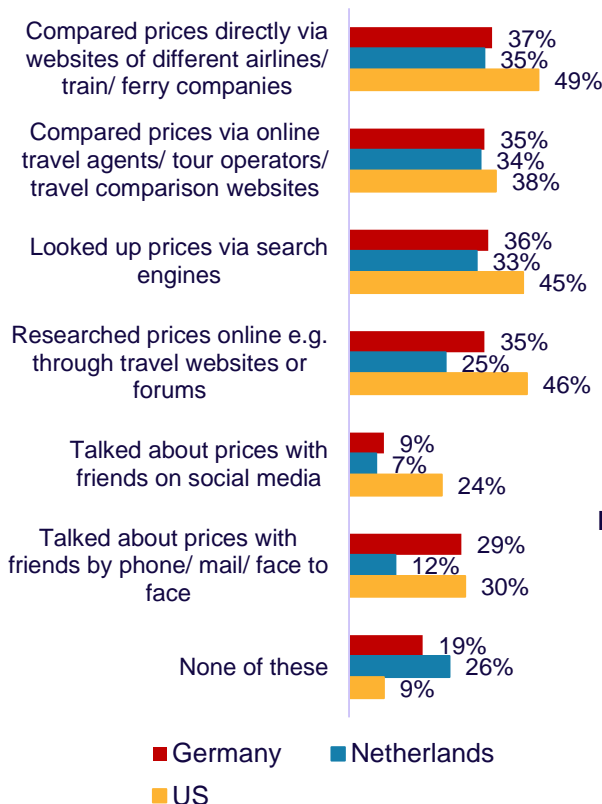
	Stage 1 - Inspiration		Stage 2 - Making the destination decision		Stage 3 - Making the big bookings (accommodation, transport)		Stage 4 - Making the itinerary		Stage 5 - Daily inspiration and support on your trip	
	DE	USA	DE	USA	DE	USA	DE	USA	DE	USA
Travel agents in person or by phone	17%	56%	22%	52%	31%	39%	24%	44%	22%	44%
Movies, books, magazines, television shows	44%	36%	34%	34%	18%	18%	33%	33%	33%	33%
Online travel blogs/vlogs	13%	34%	12%	39%	12%	49%	17%	34%	17%	28%
Online reviews (e.g. TripAdvisor)	29%	25%	35%	35%	34%	34%	25%	25%	27%	27%
All-in-one travel websites (e.g. Expedia, MakemyTrip, Booking.com)	34%	24%	39%	21%	49%	16%	34%	30%	28%	32%
Specific websites (e.g. airline sites, hotel sites, train travel sites etc).	17%	23%	20%	23%	36%	23%	23%	30%	18%	31%
Friends, family and colleagues I know	56%	20%	52%	20%	39%	36%	44%	23%	44%	18%
Facebook or other social or digital media posts and blogs	8%	20%	7%	22%	6%	31%	9%	24%	11%	22%
Facebook or other social media advertising	6%	16%	5%	11%	5%	8%	5%	11%	7%	14%
Instagram or Pinterest images and amazing photos	15%	13%	11%	12%	8%	12%	11%	17%	14%	17%
Hotel alternatives such as AirBnB	12%	12%	12%	12%	16%	16%	10%	10%	8%	8%
Tourism board sites or resource centres	21%	11%	23%	7%	23%	6%	30%	9%	31%	11%
Brochures, leaflets or books like Top Ten, Lonely Planet	21%	8%	21%	7%	16%	7%	30%	7%	32%	8%
Celebrity/ trusted expert endorsement	6%	3%	7%	5%	7%	5%	7%	5%	8%	7%

Netherlands data not available

Price research is widespread, particularly among US travellers

There is some dissatisfaction with value for money among visitors from all countries, but in particular Germany and Netherlands. It is therefore important to not only be price competitive against competitor products in England and beyond, but also to ensure that all elements of the package provide good value for money; which is as much about quality as it is absolute price

% who would do this before booking a holiday to Britain

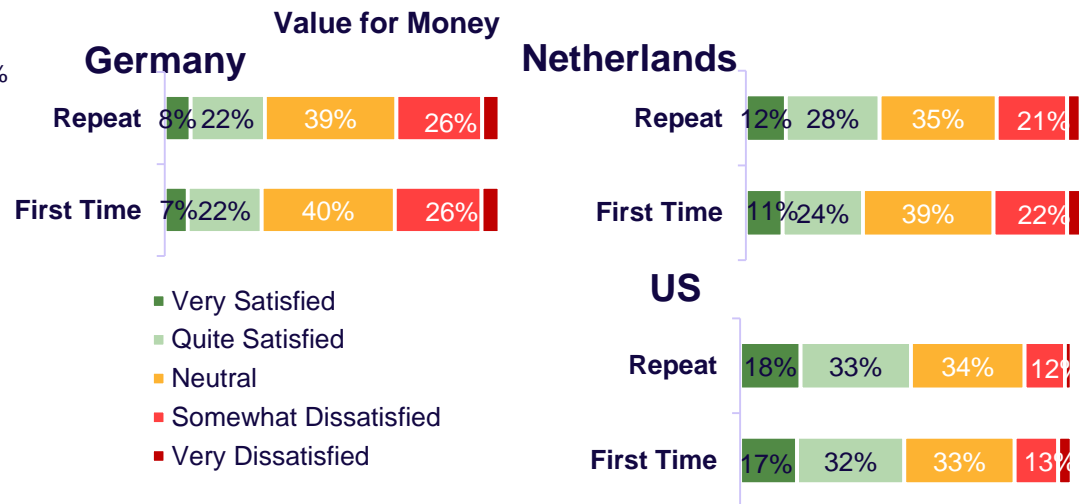


Future Travel Trend – Conversational Commerce

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".

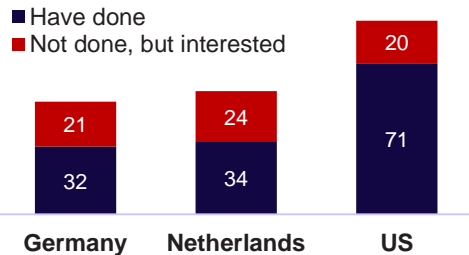
MALE, 64, GERMANY



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

- US travellers are most likely to have already used their smartphones for finding reviews. The high level of review use is important to consider when selecting restaurants and attractions for within itineraries as many travellers will check what other visitors have written.
- This importance is even greater among younger US travellers and the age pattern is consistent across all countries.

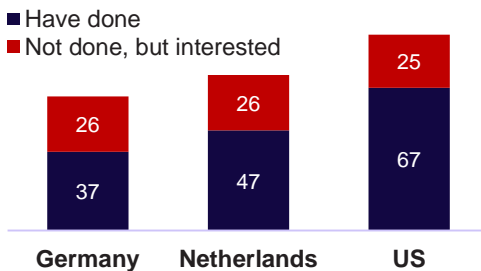
(%) Have used or interested in using smartphone to access reviews about places to eat or drink



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%
	Not done, but would do	20%	20%	23%
Netherlands	Have done	44%	32%	21%
	Not done, but would do	28%	26%	17%
USA	Have done	76%	67%	43%
	Not done, but would do	18%	22%	24%

(%) Have used or interested in using smartphone to access reviews about places attractions / places to see



Access reviews about attractions / places to see using a smartphone

		18-34 years	35-54 years	55+ years
Germany	Have done	50%	35%	25%
	Not done, but would do	20%	27%	25%
Netherlands	Have done	57%	44%	29%
	Not done, but would do	27%	29%	23%
USA	Have done	73%	69%	39%
	Not done, but would do	23%	20%	28%



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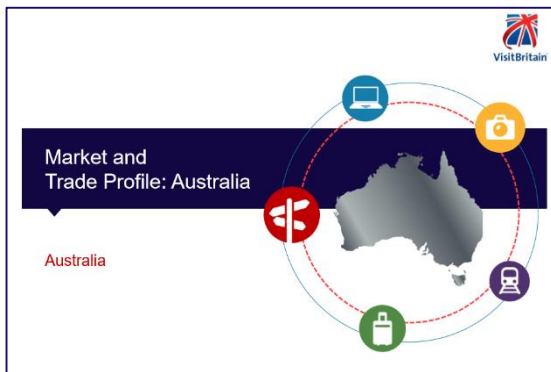
Potential Additional Market
to Consider:
Australia



The Great West Way has potential to appeal to visitors from a number of other countries, as well as the domestic market

Drawing on analysis carried out for other Discover England Fund Projects, the team may wish to look at Australia as an additional target market.

Further analysis and investigation would be needed, ideally with testing of the concept with travellers and the trade in Australia



Detailed insight into the travel sector in Australia can be found in the recently published Visit Britain country report https://www.visitbritain.org/sites/default/files/vb-corporate/markets/visitbritain_marketprofile_australia_v3.pdf

The following slides provide an overview of key metrics that point to Australia being a market to consider. Key points include:

- Greater confidence and willingness to travel and explore beyond London
- A specific interest in visiting the South West
- An interest in visiting both iconic/historic places and exploring less well known destinations.



Australia

Historically close ties with the UK but dissipating with changing demographics

Often take multi country visits to Europe

Very strong food and drink culture and into history and heritage

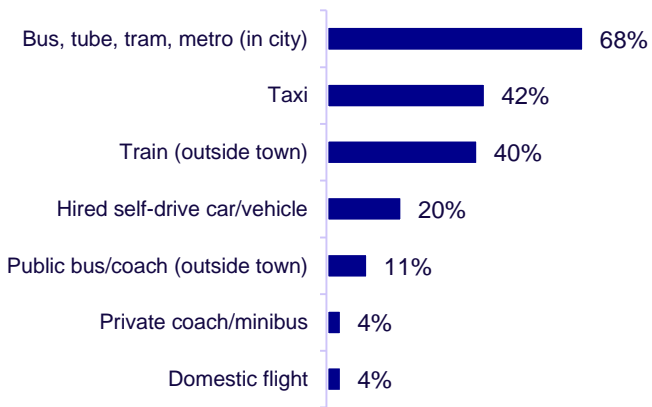
A lot of status in exciting travel stories

But for the adventurous stuff – *I can do all that back home*

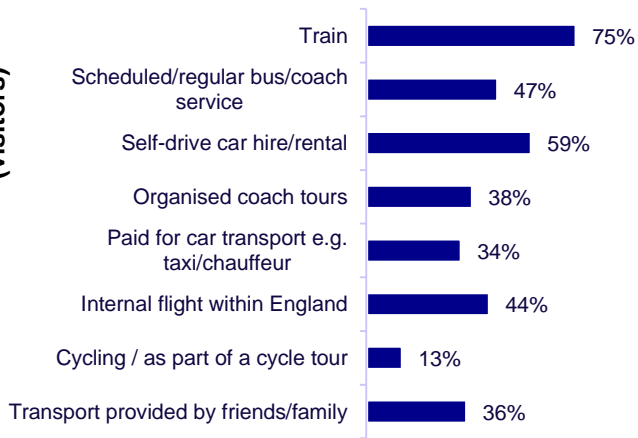
Australians are more likely to visit regional England and have an awareness and interest in the South West

Australians have a much higher usage/consideration of public transport and self-drive than the main target markets. Their willingness for self-drive is likely due to driving on the same side of the road as the UK.

Modes of internal transportation used while in the UK (visitors)*



Types of transport considered (visitors)*



62% of Australians who visited for a holiday in 2015 were repeat visitors***

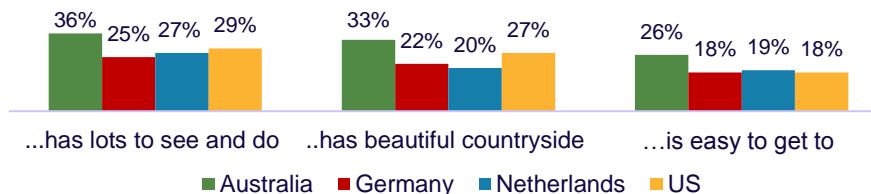
43% of Australians visit regional England on their trip and stay an average of **11** nights***

23% of Australians mention the South West spontaneously as an area they would like to visit**

65% of Australians would 'definitely' or 'quite like' to visit Western England**

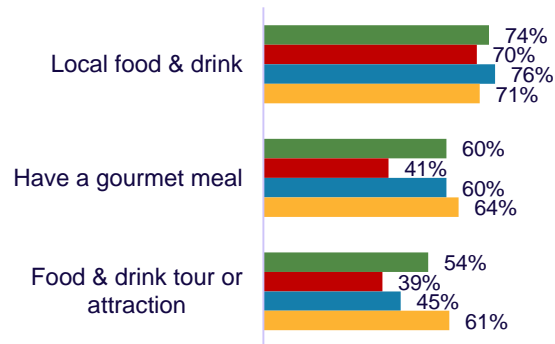
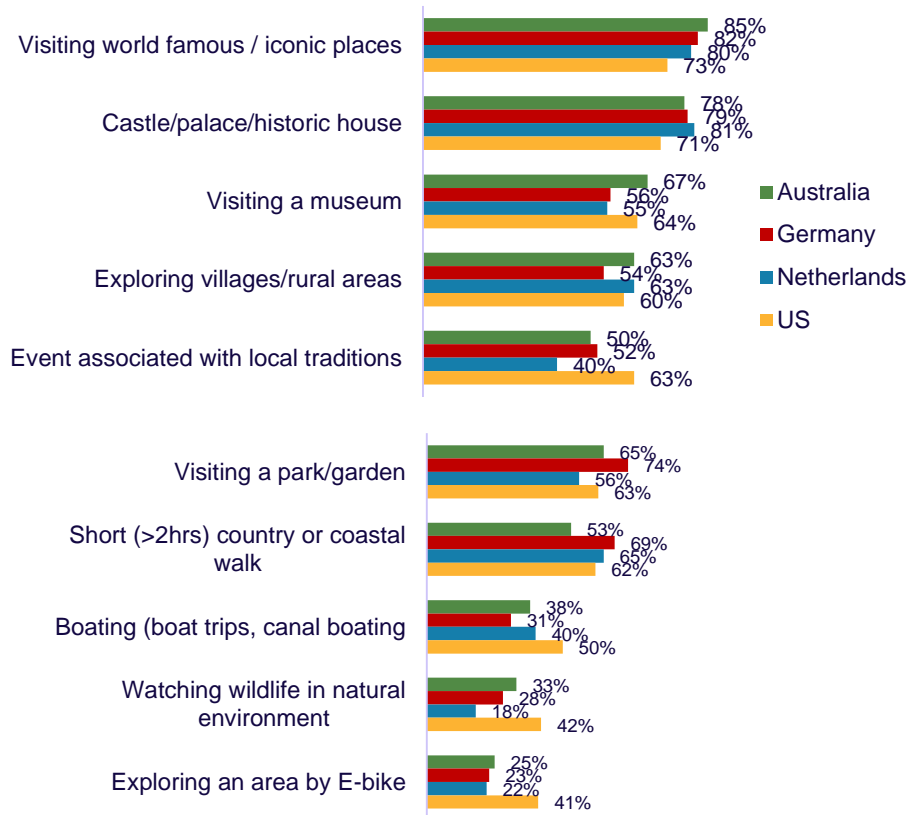
Definitely agree that (Western England region)...**:

e.g. The Cotswolds, Oxford, Bath, Bristol



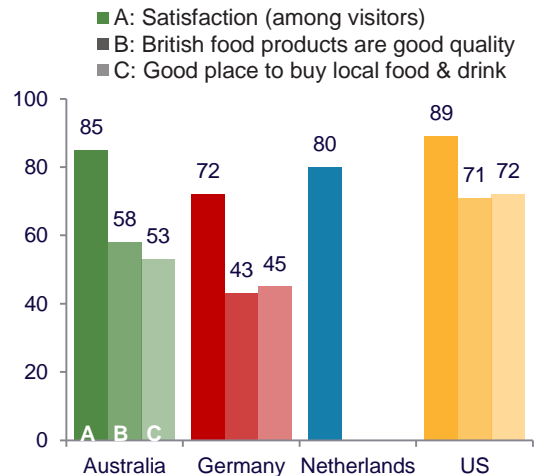
- Australians have a more positive perception of the Western region of England compared to the other target markets.
- They also have higher interest in visiting the South West than Germany, Netherlands and the US.

Australians have an interest in both iconic/historic destinations and experiencing 'real' England – a good fit with the Great West Way concept



Note: data is sourced from the DEF Summary Research Report: Making Great memories in England's National Parks and countryside 2017. Data is for visitors and considers combined, not specifically repeat visitors.

- Australians show a higher interest in visiting museums, exploring villages/rural areas. They are also interested in trying local food & drink and have high satisfaction with British food on their holiday..



Satisfaction with Food & drink among visitors to Britain (%)



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Key Take-Outs

Implications for The Great West Way



Key Take-Outs (1)

Take-Out	Implication
First Time Vs Repeat Visitors: The primary target for the Great West Way is Repeat Visitors. They are prevalent in the target markets, staying longer, spending more and more likely to go beyond London.	The differences are generally relatively small and therefore it is reasonable to assume that a product that appeals to Repeat Visitors should also resonate with First Time Visitors.
Gateways: There is a benefit in having international gateways at each end of the route	The contrast between Heathrow and Bristol are marked and the differences in their proposition, destinations covered and airlines present mean that Open-Jaw options may be challenging to implement
The Journey as Part of the Experience: Whilst not specifically explored in research thus far, it is likely that some of the transport options can be part of the overall experience, particularly where they are quintessentially English (e.g. canal boat) or where they give increased access to English authenticity (trains through scenic countryside, driving routes through quaint villages etc.)	It is however important to ensure doubts and concerns are addressed in communications by providing clear route information (stations, waypoints, ticket requirements etc.). Without these, the journey complexity or lack of understanding will impact the appeal of the Great West Way
Transport Options: The Great West Way has a number of transport options, ranging from boats and cycle to cars and trains	These transport modes differ in appeal across countries and within segments. Matching the combination of transport option to the right types of activities and themes will be key to building a coherent package in which the journey is part of the experience
The Last Mile: Linked to the overall journey, the importance of getting the 'last mile' right cannot be under-estimated	Ensuring clear and accurate information is provided for the last part of the journey – from the station to the hotel, the canal mooring to the restaurant, from Clifton Suspension Bridge to SS Great Britain, details of how, how much and how long should always be provided

Key Take-Outs (2)

Take-Out	Implication
<p>Building the market for Tours and Multi-destination holidays: Currently a small minority of inbound visitors take tours or multi-destination holidays in Britain. This is connected to the generally low awareness and visitation of regions beyond London</p>	<p>Great West Way collectively along with the other tour-based products being developed through the DEF will generate increased visibility for touring in England. This should increase the overall market opportunity, within which the Grate West Way will look to optimise its share.</p>
<p>Branding and ‘Signage’: There are a number of different sources that all point to a need for coherent branding and identification of the route and destinations as part of the Great West Way</p>	<p>Case studies of successful tour routes highlight the strength of branding. Creating a clear and strong identity will be important for trade, participating destinations, accommodation providers etc. and potential visitors. ‘Signage’ whether through maps, tour literature or on-site material at experiences, should provide the traveller with confidence that they are ‘in the right place’. These communications can also be used to reinforce the narrative that creates the coherent story through the destinations</p>
<p>Optimising the Great West Way: The Great West Way has an array of potential products, drawing on a number of different themes, an extensive portfolio of varied destinations and experiences, supported by many transport and accommodation options</p>	<p>This provides an excellent platform to build coherent and authentic products from. It does however also present some risk of being too ‘all encompassing’. Creating a clear and strong identity for the trade and the traveller will be important to the projects’ success</p>
<p>Pursuit of Real: The travel trend which speaks to authentic experiences</p>	<p>Tapping in to the travel trend, the Great West Way can provide authentic, immersive experiences that feed the growing traveller need to be ‘sightdoing’ not ‘sightseeing’</p>
<p>Accommodation: It is important to ensure accommodation providers are able to deliver the quality and value demanded by the inbound traveller and the trade</p>	<p>Whilst accommodation providers can add to the authenticity and Englishness of the Great West Way, they still need to provide the right level of service and good reviews</p>

Key Take-Outs (3)

Take-Out	Implication
<p>Fine-Tuning for Segment Needs: across the portfolio of experiences accessible to the Great West Way. As noted earlier each segment has differing transport preferences and similarly they have differing theme and activity interests</p>	<p>Packages can therefore be designed with specific segments in mind and communications content and messaging created to resonate with that segment. For example the Mature Experience Seekers are more likely to opt for organised coach tours and have greater interest in more relaxed activities including parks and gardens and rural areas</p>
<p>Travel Trade Engagement: The travel trade are key to the success of the Great West Way</p>	<p>The initial trade research has flagged some key areas that suggest opportunity for the product, but also some potential barriers that must be addressed, particularly around transport, accommodation and value</p>
<p>Source of information – Throughout the purchase journey, and in the period between booking and travel, visitors consult a wide range of sources, which differ between markets</p>	<p>Providing inspiration and information to travel agents in the US is key. For Germany early engagement with OTAs again providing inspiration and information. Activity to increase relevant and positive content on social media can increase awareness and consideration, particularly in the US</p>
<p>Package vs Independent Travel – Reflecting the higher reliance on travel agents in US, they are more likely to book a package, whilst around half of Germans and Dutch book independently, typically directly through the transport/accommodation providers</p>	<p>This has implications for the messaging. The US audience will be comfortable with the ‘package’ concept, whereas for the Europeans a greater flexibility might need to be communicated. It is perhaps also possible for partnerships with accommodation and transport to promote or sell the Great West Way package through them</p>
<p>Purchase Journey Duration. While the US market begins the decision-making process earlier, the actual booking is typically made at similar times to European Travellers</p>	<p>For the US, whilst the longer lead time may be linked to Visa applications, it does mean marketing will need to support that longer purchase journey, continuing to inspire and inform through until the point of booking</p>

Key Take-Outs (4)

Take-Out	Implication
Price – Although the US travellers use travel agents they are price sensitive too	They therefore will still use various (mainly online) channels to compare prices. Packages sold through travel agents will therefore need to be comparable on price with OTAs.
Value – Cutting across the whole offer is the need to deliver value to the traveller	Currently visitors from Germany and Netherlands often perceive England as not delivering value for money. Exchange rates will also impact this perception, but providing value requires a focus on both the quality of the experiences and the service levels as well as the absolute price.
Learning from competitors – there are a number of well-documented case studies of other touring routes	As well as the advantage of longevity which brings established awareness and positioning, most of these products e.g. the Wild Atlantic Way and NC500 have established visible brands, with dedicated websites that inspire and inform. Much can be taken from these examples and applied to the Great West Way concept in terms of branding, communications and website/app content
Other potential target markets: The Great West Way has potential to appeal to a wide audience, both domestic and inbound	Australia is highlighted as one illustration, based on their greater confidence and willingness to travel beyond London. Their interest in experiencing the 'real' England as well as seeing iconic sites makes them a good target for the type of product themes being developed by Great West Way



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An aerial photograph of a large, historic stone castle with multiple towers and a central courtyard. The courtyard features a large fountain and manicured lawns. The castle is surrounded by lush greenery and trees.

APPENDIX

Tours and Multi-destination

Case Studies

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

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

The Wild Atlantic Way, Ireland

What it is

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

Key learnings

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



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

NC500, Scotland

What it is

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

Key learnings

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



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

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



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

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



WILD ATLANTIC WAY

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



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

There are many European touring routes, both inland and coastal that may be of interest to the long haul visitor in particular and therefore be competition for The Great West Way

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

La Route des Grandes Alpes, France

What it is

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

Key learnings

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



Selection of Other Routes in France

Including, but not limited to:

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



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

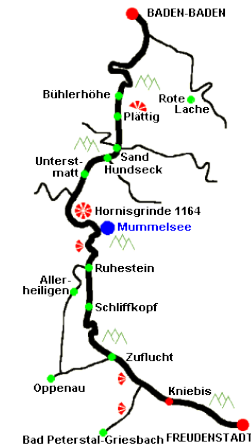
Black Forest High Road, Germany

What it is

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

Key learnings

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



Selection of Other Routes

Including, but not limited to:

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

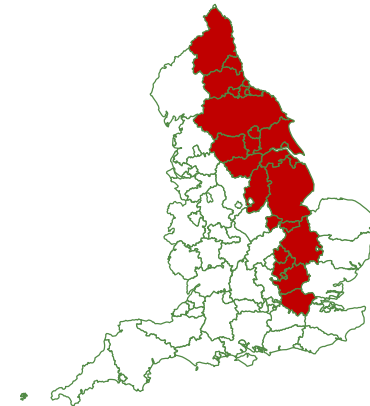


Discover England Fund – East of England Touring Route

Potential similarities and therefore shared learning for The Great West Way

Proposition

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



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

Highlights	Visiting
- Drink beer in English pubs - Explore English Civil War - River lunch cruise - English chocolate making	- Oakham - Stamford - Grantham - Nottingham - Newark-on-Trent - York

Itinerary - sights and key stops
<ul style="list-style-type: none"> • Stamford walking tour • Lunch at Bull and Swan, a former coaching inn • Afternoon tea and Croquet at Barnsdale Gardens • Clipsham Yew Tree Avenue • Angel and Royal – one of Britain's oldest inns • Belvoir Castle • Colston Bassett Dairy • Ye Olde Trip to Jerusalem – tour of oldest pub in England • Nottingham City of Caves • Lunch cruise on the River Trent • Newark National Civil War Centre • Brodsworth Hall & Gardens • York Walmgate Ale House • York Chocolate Story

Key facts:	
 4 days	 40% itinerary elements currently work with travel trade
 £ 2,199 for 2 people	 Self drive
 329 miles	 Arrive Port of Harwich  Depart Port of Hull

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

Highlights	Visiting
- Discover England in 1842 - Fly birds of prey - Take a cycle tour - Dine at Medieval banquet	- Leeds - Ripon - Darlington - Gateshead - Newcastle-upon-Tyne

Itinerary - sights and key stops
<ul style="list-style-type: none"> • Thackray Medical Museum • Man Behind the Curtain Seven course tasting menu • Kirkgate Market • Himalayan Garden & Sculpture Park • Lunch at Royal Oak 18th century pub • Walworth Castle Birds of Prey Centre • Raby Hunt Inn – 2 Michelin star restaurant • Angel of the North • Tour of this Georgian Gipside estate • Cycling with Saddle Skedaddle • Blackfriars Medieval Banquet

Key facts:	
 3 days	 54% itinerary elements currently work with travel trade
 £ 1,356 for 2 people	 Self drive
 175 miles	 Arrive Leeds or Bradford airport  Depart Newcastle airport



Appendix: Sources



Links to data sources/research titles

- 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
- Discover England Fund Travel Trade Research, 2016
 - https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/def_travel_trade_research_-_final_report_22_june_2017_v2.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
- VisitBritain Segmentation, 2017
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 - <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>



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