

**Open Report on behalf of Richard Wills,
Executive Director for Environment and Economy**

Report to:	Environment and Economy Scrutiny Committee
Date:	16 January 2018
Subject:	Strategies to Attract Visitors

Summary:

This report provides members with a detailed analysis of the intelligence that is held on visitors to Lincolnshire and on current strategies to attract visitors. It shows that at a national level Visit England and Visit Britain are changing their tourism strategies to appeal to a younger market. The report also shows that LCC and the Greater Lincolnshire LEP have commissioned a substantial amount of research that will help LCC, district councils, and tourism operators to understand visitors' intentions. The report also describes the work that the council's PR contractor does to encourage the travel media to place stories about Lincolnshire.

Actions Required:

Members of the Environment and Economy Scrutiny Committee are invited to:

1. Endorse the work that LCC continue to do in promoting the county to the travel media;
2. Consider the breadth of information that is available to assist in the development of tourism strategies, and;
3. Task officers to work with the LEP and other partners in making this information available to tourism businesses to assist them with their planning.

1. Background

The winter period sees much planning for the upcoming visitor season, analysis of latest research and trends and gaining an understanding of Visit England/ Visit Britain forward work plans. This report summarises some of this work and looks at the latest Lincolnshire research.

World Travel Market (WTM) 2017

At this year's event Mayflower 400 had a stand promoting all the English partners which includes Gainsborough, Immingham and Boston, who are all part of the Mayflower Trail. Our PR specialist attends to represent Lincolnshire and he makes contact with leading national and regional travel media during September, October

and November to set-up scheduled appointments in the press room at WTM for Press Day. This is a great opportunity to not only contact a wide variety of journalists about meeting at the event, but also a chance to follow-up with 2018 story leads post WTM.

On the day itself, he holds a mixture of scheduled and ad-hoc meetings with journalists using the press room and this resulted in more than 20 sit-down chats; a mix of national freelance journalists, group travel media, travel bloggers and influencers. Key Lincolnshire stories for 2018 were the RAF Centenary (including the International Bomber Command Centre opening), the new North Sea Coastal Observatory and natural coast offer, and Lincoln Castle 950th anniversary. For many travel journalists 2020 is still some way off, but he did touch on Mayflower 400 with relevant media. Over the coming weeks and months he will undertake follow-up on conversations with contacts made.

Key contacts were as follows:

Freelance - The Sun; TravelGuru.tv; Editor, Group Leisure; Wanderlust magazine; Freelance - US and UK; Editor, Coast magazine; Freelance nationals; Editor, loveExploring.com; Hello Magazine Travel Online; Belgian freelance; Freelance People's Friend, Women's Weekly; Freelance nationals; TravelBeginsAt40 travel blog; TiredMummyOfTwo travel blog; Travel editor - Express & Star; Editor - Coach Tours; Freelance nationals; MiniTravellers - travel blog; Freelance Daily Telegraph; Content editor Travel GBI; Freelance nationals; Freelance – nationals; Freelance - Woman's Own, Woman's Weekly, TheTravelagazine.net; Freelance; Freelance; Freelance, and travel blog – MummyTravels; Freelance – nationals; Freelance - Daily Telegraph, Sainsbury's Magazine; Freelance; Freelance; Influencer - A Life Well Travelled; Travel editor – The Sun; Freelance for nationals; Britain Editor - Lonely Planet; Travel editor – The I; Online travel editor – The Guardian; Fabulous magazine (The Sun on Sunday); Sunday Express magazine; Travel blogger and freelancer for nationals; Editor Britain magazine; Tin Box Traveller.

Along with the media listed above, there are more key contacts who were unable to attend WTM but who asked to receive his 2018 story leads.

Working with Visit England/Visit Britain (VE/VB)

VE and VB have decided on an entirely new approach to marketing and PR, the clear message outlined at their PR conference being that the aim now is to put the target audience (Millennials/Generation Y) first – and to focus more closely on working with Influencers, and via social media channels. Following the conference VE held its annual Media Networking event, where it was possible to meet and discuss story ideas with national and international travel media. Around 90 journalists and influencers had signed-up to attend.

Overview

The 'staycation', born out of the recession in 2009, has been a growing trend ever since. Despite a dip in 2014, numbers recovered in 2015 and remained stable in

2016. Figures so far for 2017 show a 7% rise – a survey record. VisitEngland (VE) surveys domestic overnight tourism and measures the number of ‘holidays’ (short breaks), ‘VFR’ (visiting friends and relatives) and business stays. Over the last decade, the biggest year-on-year increase has been in short breaks lasting four-plus nights, but short breaks (1-3 nights) still dominate. Two thirds of trips are 1-3 nights - with four million more short breaks now compared to before the recession. Last year breaks of four-plus nights were up by 5%, mostly taken over Easter, August and September. Generally longer trips are taken by those aged 35-65 years. The VFR market, meanwhile, has seen a decline. With less disposable income, people choose to spend money on ‘holidays’, over the ‘duty’ of seeing friends and family.

Going forward, the target audience for VisitBritain (VB)/VE marketing and PR will be sharply focused on the Millennial/‘Generation Y’ market (16-34- year-olds), who last year took almost 1.4m fewer holidays at home compared to a decade ago. Five particular tourism trends were highlighted by VE:

1. ‘The Changing Demographic’ – although an ageing society, we are now seeing Baby Boomers hitting retirement and the ‘Punk Generation’ reaching their sixties. They are not looking for the same leisure activities as previous generations – rather, it is ‘The Age of Not Acting Your Age’. There are also more single-person and single-parent households.
2. ‘The Filter Bubble’ – the digital trend to filter search results and news feeds to reflect the user’s preference, trapping people inside bubbles rather than widening their choices. The challenge is how to reach those people and burst through the “bubble”, by using tools such as trending hashtags and coming-up with innovative ideas to target a particular audience.
3. “Performative Perfection” – people are using social media to connect, interact and share content with followers to showcase their digital lives. Utilising the importance of self-presentation can help people discover new experiences, creating “bragging rights” (and a status symbol) via social media tools. Travel and tourism is a great way to show off and brag.
4. “The Pursuit of Real” - people don’t want to think of themselves as tourists, but travellers. It’s now all about travelling to enjoy ‘authentic culture’ and real-life experiences. This is also an important global trend, so overseas visitors can see the mundane as exotic. It’s about having tea where the locals go, meeting locals, doing things locals do. But they still desire that shot of iconic locations and attractions, often for background to a selfie.
5. “The Leisure Upgrade” – doing rather than just visiting, it’s about immersive holidays, developing new skills, having-a-go and using a hobby as a tourism experience. Airbnb, for example, now offers not just accommodation, but experiences - from learning the art of taxidermy to spending time with an artist.

On the marketing front VB/VE feel that the problem Britain faces is that the world feels that it already knows what to expect. The international challenge, therefore, is how we move towards being seen as a stimulating and exciting destination: to change the opinion that Britain is a place to “see one day” to a country “bursting with things to experience now”.

One solution that VB has identified is to highlight experiences rather than things, under the following five “hero experiences” of Coastal and Country Life; Cool Cities; Living History; Great Tastes; 365 Days of Fun.

And these, in turn will be used to target the following audiences:

- Buzzseekers (making up 38% of the target audience) – younger, 64% aged 18-34, free spirited and spontaneous, holidays full of action and excitement.
- Explorers (23%) – older, 58% aged 55-plus, enjoy more relaxed pace, nature lovers, enjoy the outdoors as well as must-see sites, embrace local culture.
- Adventurers (16%) – older, 67% aged 45-plus, travel off the beaten track, spend time outdoors in nature and seek out new experiences.
- Sightseers (12%) – older, 57% aged 55-plus, stay within comfort zone, prefer cities to countryside, seek sensible, well-planned trips.
- Culture Buffs (12%) – average age of 37, image and brand conscious, travel often a status symbol, like well-known and safe destinations.

To do all this, VE and VB will now be working in a far more integrated way: repurposing stories sourced for the UK audience for the international audience; liaising more closely and more regularly with influencers for a global reach; sharing knowledge and resources as one combined team.

Domestic GREAT Campaign: Millennials/‘Generation Y’ has a low knowledge of geography, and little perception of what is on offer in Britain - and tend to take low cost overseas holidays. The new aim is to bring this audience ‘home’ by educating them on the geography and tourism product available - generating one million additional UK bed nights.

‘Join the World/Discover the UK’ is the new campaign aimed at changing the familiar perceptions of Britain - by encouraging ‘Generation Y’ to discover Britain like a global traveller, to see Britain through different eyes. These ‘free and easy mini breakers’ are budget conscious, make a spontaneous decision to book a holiday and look for deals. Activities highlighted will need to tap into one of their three emotional needs: **Rest** (a mental and physical break from the norm); **Treat** (to indulge); **Excite** (adventure that energises and rejuvenates).

And the three key activities identified to tap into these are:

1. A City Trip – a tried and tested formula for Gen Y that works anywhere, but with potential to extend the trip and add a few extras;
2. A Coastal Trip – again a tried and tested formula for Gen Y, not put off by weather, but with the opportunity to extend the trip;
3. A Countryside Trip – Gen Y is not as comfortable with this break, and has little idea of what to do when they get there.

The next step is the creation of a campaign hub and content creation. Social media and influencers will now be used to target the ‘Gen Y’ audience and utilise a new “Join the World” hub: www.visitbritain.com/jointheworld - featuring: Influencer content; Blog articles; User Generated Content (USG) imagery from Instagram - images that appeal to a millennial audience; Creating top-line inspiration with

added anecdotes and interesting details; Sending the user to various partners to book/find out more.

Targets for each overseas market are far more defined than ever before. They are selecting from five global audiences: Buzzseekers; Explorers; Adventurers; Sightseers; and Culture Buffs.

VB's PR team, meanwhile, will be promoting Britain as: "The world's most unexpectedly wonderful island"; and the PR teams are looking for "tales of the unexpected" for them to amplify on-territory.

The Netherlands: Targeting 'Explorers' and 'Buzzseekers', as well as specific areas of Britain, over the upcoming four quarters of 2018

Norway: Targeting 'Buzzseekers' and 'Explorers'

Russia: An increase in visitor numbers from Russia to the UK, but flights only to London now. Russian visitors are now interested in cities other than London, travelling by train, and 'authentic experiences in the UK (staying in B&Bs rather than chain hotels, eating where the locals eat, etc).

Spain: Music, food, drink and 'experiences' are key for Spanish visitors.

Sweden: Main target are the four regions of Britain: West Midlands (or potentially South West instead, depending on flight route changes); North West; Scotland; and South East.

APMEA (Asia, Pacific, Middle East, Africa): Looking for unexpected experiences – at the 5-star-plus end of the scale. (Visitors from this part of the world are more likely to ship their own cars to the UK, than travel by train).

Italy: Focusing on targeting different regions of the UK during the upcoming seasonal, quarterly calendar.

USA: Targeting 'Buzzseekers' and 'Sightseers'

Japan: Targeting groups, traditional routes

Australia: Tourism spend from Australia has increased 59% over the past ten years. Targeting 'Buzzseekers' and 'Explorers'. Working with London-based correspondents.

Brazil: Visitors from Brazil are starting to explore further afield than London. Happy to join day tours, or travel by train. Especially interested in music, history and heritage as well as anything royal and also TV/films.

Canada: Targeting 'Explorers'. Always interested in film/TV locations, food, literature and – this year – centenary of the end of WWI.

Germany, Switzerland, Austria: One of the few VB offices in the world still increasing in terms of staff, Germany remains a key market for Britain. Staff always highly selective and usually bases their requirements on the key trends and VB campaigns for the coming year.

China and Hong Kong: Looking for news to post on the Chinese VB Media Centre distributed to around 1,000 media contacts, and for use on social media channels. Visitor figures from China are still on an upward trend. Targeting 'Buzzseekers'. Chinese visitors are looking for culture, (easy access) countryside and shopping.

Denmark: All three Nordic countries (Denmark, Sweden and Norway) are now managed out of a VB office in Stockholm.

France: France remains a strong market for media coverage, and visitors. Staff looking for something new, unusual, or very topical. VB France now targeting 'Buzzseekers' and 'Explorers'.

India: Targeting cities outside of London (Liverpool, Edinburgh, Birmingham); and looking for practical information on how to travel around the UK (trains, buses, etc). Targeting traditional family visitors and younger explorers.

The Lincolnshire Perspective

In late 2015 LCC and Greater Lincolnshire LEP commissioned a Review of Tourism to look at future priorities and delivery arrangements. This report made five recommendations and all are in varying stages of delivery.

One of these recommendations was to: 'Produce a comprehensive body of information about visitors to Greater Lincolnshire' and much progress has been made on this. Good market intelligence will support good decision making. It can be used to direct investment, guide promotion, develop product and promote collaboration where there are common interests. Essentially it will help Lincolnshire to become customer focused. We were advised that this body of information should contain:

- Visitor profiling/segmentation: a clear picture of who is visiting, an analysis of their characteristics, interests, information channels, motivations and as well as good understanding of future visitor trends.
- Visitor satisfaction: information about what visitors like, don't like and what would encourage them to stay longer and return more often.
- Identification of non-visitor groups: better understanding of who isn't visiting Lincolnshire and why, to help develop new product and new audiences.

It was thought that both county and districts had much existing data and that this should be gathered together to identify what is and isn't known. Recent work by the Nature Partnership, the Cultural Partnership, a LEP-led study to look at supply and demand in the hotel accommodation sector are just three examples where research has been undertaken and doesn't need repeating. There will be gaps and once these are identified they can be filled to produce a comprehensive picture.

Much of what is instinctively known and understood by the businesses and organisations active in the visitor economy will be confirmed in this process and new intelligence will help everyone look forward and adjust their activity.

What follows is a brief summary of the key findings:

- Almost 20 million people visited Lincolnshire in 2015
- Visitor numbers have grown 15.5% between 2009 and 2015
- The visitor economy had an impact of £1.34bn on the Lincolnshire economy in 2015
- The impact of the visitor economy has grown 38.4% between 2009 and 2015
- Over 15,600 people are directly employed in the visitor economy
- Direct employment has grown by over 13% between 2009 and 2015.
- Staying visitors account for 17% of overall visitor numbers but contribute 57% of the economic impact.
- Staying visitors spend supports almost twice the number of jobs than day visitors
- Shopping, food and drink and indirect expenditure are the main beneficiaries of the visitor pound

As well as segmenting Greater Lincolnshire's visitors Arkenford's survey has produced additional basic visitor intelligence. The headlines are:

- The top four destinations for visitors are Lincoln, Mablethorpe, Skegness and the Lincolnshire Wolds
- The main demographic of visitors that completed a survey were aged over 45 with no kids living at home
- People aged between 25 and 44 are interested in visiting Lincolnshire
- The most used source of information before visiting is the internet
- The most used source of information during a trip is a TIC or brochure but internet is second
- Lincolnshire exceeds expectations for over half of the people surveyed
- Lincolnshire compares well to other UK destinations, in particularly for rural and coastal getaways
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- Visitors associate Lincolnshire with open space, attractive countryside and big skies.
- The activities that visitors associate with Lincolnshire are walking, cycling and coastal activities
- The family offer is not strongly associated with Lincolnshire despite the area having family product
- The top two types of holiday taken by those surveyed were rural and traditional holidays
- Lincolnshire is perceived as a place to enjoy peace and quiet and the outdoors
- Limited awareness of the destination and knowledge of what it has to offer are the two main barriers to people visiting

In 2009 Arkenford produced a comprehensive segmentation study for the county. 3000 interviews were conducted to produce insights into the people visiting the county, and grouped them into value-based segments, with portraits of each group. The report provided ideas on segments that could be targeted in the future as well as insights into image and awareness of the destination. Arkenford's work was well

received across the county and was used to inform marketing and development activity. In 2016 a smaller study comprising 748 surveys and analysis of 87,000 postcodes has updated the earlier report looking at what has stayed the same and any significant differences.

The headlines are:

- The top two segments visiting in the last 2 years are Traditionals and Functionals.
- Cosmopolitans and High Streets say they have visited but less recently.
- Traditionals, Functionals, Cosmopolitans and High Streets are most likely to express an interest in visiting Lincolnshire.
- The number of Functionals visiting in 2016 is higher than in 2009. This may be to visit specific events which is a popular type of break for this group.
- The number of traditionals visiting has decreased.
- Functionals and Traditionals take more short breaks or longer holidays than day trips.
- Cosmopolitans and High Streets take a roughly equal number of staying and day trips to the county.
- Functionals are more likely to have visited for a specific event.
- Traditionals show the strongest interest in visiting attractions, and family and historical attractions in particular.
- Countryside walking and enjoying the outdoors is more popular than average with Functionals.
- Lincoln and Skegness are the top two destinations for all four top segments.

Arkenford produce fuller portraits of each segment and these highlight where large proportions of each segment can be found, demographics, leisure preferences and motivations, media preferences, internet use and social media use. Brief definitions of the two main groups for Lincolnshire are given here.

Traditionals:

- Self-reliant and independent
- Hold traditional values
- Unlikely to justify spending on expensive alternatives
- Value more traditional established brands
- Functionality is far more important than style and individuality
- Value, and will pay for, good service, which for them means recognition and individual attention
- Relaxed pace of life
- Enjoy intellectual challenges, arts and culture

Functionals:

- Self-reliant
- Very price driven and value functionality strongly over style
- Traditional values
- Not prepared to pay for fashion, style or individuality
- Not early adopters of new ideas
- Interested in new ideas and willing to try things new to them
- Enjoy intellectual challenges, traditional arts and culture

- Resistant to spending
- Service is something they expect, as opposed to something they will pay extra for

Taken together it is possible to gain a general sense of the visitor experience to Lincolnshire from surveys undertaken by the County and Districts.

- Customer service is generally rated highly. For example in the Lincoln report 50% of visitors rate the level of customer service as excellent and it is rated highly in the Skegness visitor survey, the Lincoln Cathedral TripAdvisor report and the North Kesteven attractions reports.
- Services and facilities, such as catering, toilets and car parks, are generally rated lower than other aspects of a visit. In the County Heritage report they have the lowest rating as they do in the Skegness Visitor Survey and the North Kesteven attractions reports.
- The rating of the quality of product differs. It is rated highly in Lincoln, County Heritage and in North Kesteven reports but lower in Skegness.
- Quality of experience is consistently rated highly with 38% rating it exceptional in the Lincoln report and positive scores the North Kesteven and the County Heritage reports.
- Public realm is rated in two reports, Skegness and North Kesteven attractions report, and is rated lower than other aspects of a visit.
- Value for money has generally good scores though there are some differences, with a good rating in the County Heritage report, a high score in Skegness but a mixed picture for the Lincoln Cathedral TripAdvisor report and North Kesteven's attractions report with some visitors giving this category an average score.

Non-Visitors to Lincolnshire

It is also important to understand why visitors don't come to Lincolnshire and in 2017 we were able to commission some non-visitor research. What follows is a brief summary of its findings.

Not knowing enough about the place is the key reason for not visiting, with 43% of respondents stating this as a reason. It is not that Lincolnshire doesn't offer what they want, they simply don't know what it offers. The second most ticked reason is that there are other places that they would like to visit. Amongst non-visitors, knowledge of the area is fairly low. When asked about their associations with Lincolnshire it was found that only a small proportion of the sample had any strong associations or perceptions of the area.

Lincolnshire scores best as a destination for a coastal holiday, with Skegness in particular being perceived as a destination for a lively seaside resort holiday/short break. The rural offer is where Lincolnshire struggles to compete with other destinations in the north of England. Raising its profile as a rural destination will help to broaden its appeal and attract more first time visitors. In terms of city breaks, Lincoln scores most highly when it comes to arts, culture and heritage – the most popular type of city break.

Scenery, history and culture are the key themes which would attract non-visitors to Lincolnshire. The county is best known amongst non-visitors for its natural coastlines, with 50% of the sample saying that they have good knowledge of this offer. However there is a higher number of people who are unaware of the offer than people who are aware. Aviation heritage has the highest number of people unaware of the offer. It also has a relatively low proportion of people who would be more likely to consider a visit knowing of the offer, suggesting that aviation heritage is more of a niche offer. After seeing a list of the types of things that Lincolnshire offers, only 11% of the sample said that they would not consider visiting.

2. Conclusion

It is clear that a good body of information exists to inform strategies to attract visitors to Lincolnshire. National strategies appear to be partly directed towards potential visitors to Lincolnshire, but partly not. It is important therefore that partners in Lincolnshire work together with national bodies where our objectives are aligned because that will achieve added value, but that we continue to have the capacity to promote Lincolnshire to likely visitors even if they are not within national priorities.

3. Consultation

a) Have Risks and Impact Analysis been carried out?

N/A

b) Risks and Impact Analysis

N/A

4. Background Papers

No background papers within Section 100D of the Local Government Act 1972 were used in the preparation of this report.

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