

**Market Research for Norfolk off-season experiential tourism**

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# Glossary

|  |  |
| --- | --- |
| VFR | Visiting Friends & Relatives |
| MICE | Meetings, Incentives, Conferencing, Exhibitions |
| AB | Social Grade; Higher & intermediate managerial, administrative, professional occupations |
| C1 | Social Grade; Supervisory, clerical & junior managerial, administrative, professional occupations |
| C2 | Social Grade; Skilled manual occupations |
| DE | Social Grade; Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations |
| Bednight | A bednight is a hotel term which is a measure of occupancy of one person assigned to one bed for one night. Essentially, it is a hospitality industry term for a quantifying of bed occupancy. |

# Overview/Executive Summary

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# Objectives

* Identify Norfolk’s target markets both nationally and internationally and gain an insight into the visitors’ profiles, their key attributes and behaviours
* Identify key experiential tourism trends
* Explore what experiential tourism offer in Norfolk could look like post Covid-19; opportunities and challenges

# The shift to experiential tourism

Experiential tourism is a growing travel trend based on regional uniqueness. Authenticity is at the core of it (Travel.earth, 2019); travellers now seek off-the-beaten path, ‘live like a local’ authentic experiences throughout the year (Expedia & Skift, 2018). They yearn to immerse themselves in new cultures and explore local foods, activities and arts. Regions all around the world have shifted from destination-based approaches to successfully harness this new experiential trend to extend the season.

*Tourist versus Traveller*

As experiential travel continues to grow, the idea of the ‘tourist’ has become outdated and replaced by that of the ‘traveller’. Experiential travellers have an ability or desire to travel at different times of the year to try new things and they place greater importance on ‘to be’ rather than ‘to have’ (Trekksoft, 2018). They prefer shorter travel times and are happy to stay in their own regions and experience new things in a sustainable way (Joynplayce, 2019).

# Domestic Visitors

The UK’s domestic tourism market was increasing before Covid-19. More than half of the consumers surveyed by Barclays in 2019 said they would take most or all their holidays in the UK while 3 in 10 domestic holidaymakers were planning to spend more holiday time in the UK in 2019 than in previous years. Younger travellers lead the staycation surge; people aged 25-44 said they would most likely spend their main holiday in the UK and might mix in short UK breaks too (Barclays, 2019).

According to the same research, the East of England region was not far behind in consumer preferences compared to other more established destinations; 12% of those surveyed said they were planning to visit the region compared to 18% in the North West and 20% in Yorkshire and the Humber. In addition, the East of England saw an 11% increase in overnight trips taken by British residents during 2019 while bednights and expenditure in 2018 increased by 12% and 6% respectively (Visit Norfolk, 2019).

Visit Britain (July 2020 Tourism Forecast) predicted a 48% decline in overnights, leisure day trips and domestic tourism spending due to Covid-19. However, despite the huge decline, the domestic market is expected to recover more quickly than the international one.

## Domestic Market Segmentation

Visit England breaks down domestic visitors into five distinct sub-groups based on different attitudes, needs and behaviours (Figure 1). Segmentation of this type supports targeted marketing and tourism product development.

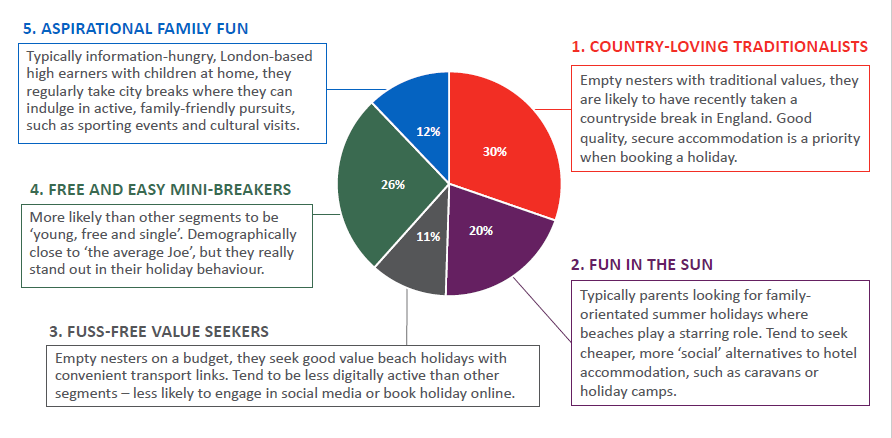


Figure 1. Domestic tourism sub-groups (Visit England 2016)

‘Country-loving Traditionalists’ and ‘Free and Easy Mini-Breakers’ are the segments of direct relevance for the development of off-season experiential tourism offer in Norfolk. Together, these segments represent more than 50% of all visitor types.

‘Country-loving Traditionalists’ are more likely to be aged 55 years and above with no children and live in East/Anglia and South East. They seek UK destinations with unspoilt countryside, offering opportunities to eat/drink local food/produce and a wealth of cultural experiences. This group prefers the personal touch of a B&B or rented accommodation instead of staying in a hotel.

The ‘Free and Easy Mini-Breakers’ are most likely to be under 55 years old, single with no children and are predominantly based in the North East or West. Cultural experiences are important: this segment is most likely to visit a museum or gallery and indulge in cultural entertainment during a mini-break. They seek beautiful countryside and interesting towns and cities from a holiday in England. Their top priority when choosing a holiday is a destination that is easy to get to by public transport.

The next two segments that could be targeted are ‘Aspirational Family Fun’ and ‘Fuss Free Value Seekers’ (23%). The former are more likely to live in London and they tend to be under 50 with children. They are looking for a good availability of festivals, music and cultural events and a range of water-based/beach activities. They usually have high income and are more likely to take a longer holiday than other segments. They are also eco-conscious and prefer to spend their holidays in England as this make them feel like they are doing less harm to the environment. However, their travel is generally limited to weekend day trips and school holidays.

‘Fuss-Free Value Seekers’ mostly live in Eastern England and are most likely to be single, with no kids. Almost 50% are aged 55 or above. This segment is looking for a destination that doesn’t take too long to get to, with 34% only considering English destinations when planning a holiday or short break. They seek deals and discounts when choosing a destination and prefer to spend their time shopping, at the beach and exploring small towns when on holiday.

The ‘Fun in the Sun’ segment is comprised mainly of families looking for sunshine and summer holidays. This is not relevant to the off-season focus of the EXPERIENCE project.

## Norfolk Domestic Visitors - Key demographics

A 2019 Visit Norfolk Survey revealed that 82% of people resident in the East of England have visited Norfolk, followed by those living in East Midlands (76%), Greater London (59%) and South East England (57%). Men (62%) are most likely to visit compared to women (48%) with most visitors between 18-34 (35%) and 35-54 (30%). Only 28% of visitors were over 55, however they are likely to have visited the county more than 10 times previously and they usually travel from the East and the East Midlands.

In terms of social grade, over 50% of those who have visited Norfolk belong to the middle and upper working classes (66% in AB, 53% in C1, 58% in C2) while only 46% of the DEs have ever visited Norfolk for leisure. Visitors are more likely to travel with their spouse/partner (66%), their children (under 16) (18%) and their adult friends (17%).

Around a third of visitors to Norfolk arrived for purposes other than leisure (e.g. business or other obligation). The Meetings, Incentives, Conferencing and Exhibitions (MICE) market, people visiting Norfolk for business, could be a market to consider targeting as those people are more likely to travel in the off-season and generally spend more than leisure travellers in less time (cbi.eu, 2016) however this market has been hit hard due to covid-19 and is not expected to recover soon.

## Perceptions of Norfolk & Most Appealing Areas among Domestic visitors

Participants in the 2019 Visit Norfolk Survey said that Norfolk is more appealing than Kent, Lincolnshire and Suffolk and less appealing than the Lake District, Devon, Scottish Highlands and Cornwall. They are more likely to describe the county as flat, rural, peaceful, interesting and beautiful.

Norwich, Great Yarmouth, Cromer, King’s Lynn and Hunstanton were the areas mentioned the most by participants. Contrastingly, they were less aware of the Brecks and Thetford forest. Older participants (55+) were most likely to know most areas in Norfolk.

The same report suggests that those living in the East and Greater London are likely to have visited 3 areas of Norfolk on average, whereas those from the North, South and West an average of two. In addition, those living in the North and West are significantly less likely to have visited Norwich. Eastern residents, and those with higher income (ABC1s), are more likely to have visited North Norfolk and Thetford Forest. Lower income visitors are more likely to have visited Great Yarmouth.

The majority of the frequent leisure visitors to Norfolk typically return to the same areas. However, those who always visit new areas are more likely to be 35+ and without children while those who always return to the same areas are more likely to be DEs.

Within Norfolk, the Broads are considered to be the most appealing area, followed by Great Yarmouth and North Norfolk. The least appealing areas are the Fens and Great Yarmouth. Those results indicate a split in the visitors’ views about Great Yarmouth something which should be considered during development of tourism activities in this region.

## Types of holidays & Duration

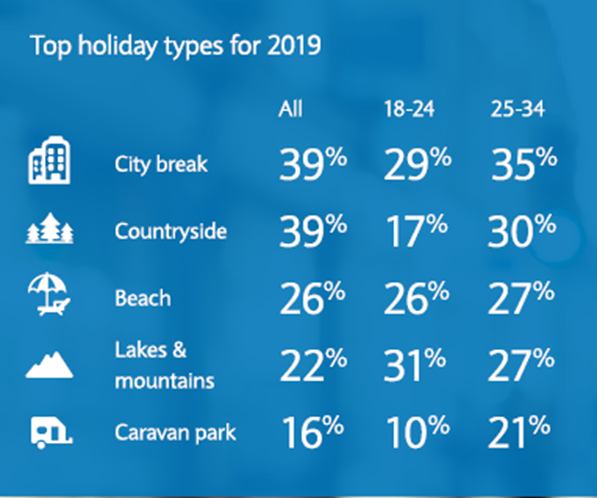
The most popular holiday types amongst domestic visitors (2019) were city breaks (39%) and holidays in the countryside (39%), followed by beach holidays (26%) and lakes and mountains (22%). Caravan park holidays, although not popular overall (16%), were favoured by visitors aged between 25-34.

Figure 3: Top holiday types for domestic market in 2019 (Barclays 2019)

Visit Norfolk research (2019) indicates that weekend breaks in Norfolk are most popular, followed by weeklong holidays. A very small number said they would stay for longer than a week. People who visited Norfolk in the past are significantly more likely to spend a weeklong holiday in the county. Younger visitors (18-34s) show a preference for weekend day trips and short breaks whilst older visitors (55+) prefer mid-week breaks and weeklong holidays. ABC1s are more likely to go on a short or long weekend break.

## Seasonality of visits

As expected, most visitors travel to Norfolk between May and September. Those aged 35-54 with children and DEs are more likely to visit during the summer months. However, younger people and those living in Greater London or within an hour’s drive-time are more likely to visit during the off-season (Visit Norfolk, 2019).

## Accommodation & Transport

According to Visit Norfolk research (2019), guesthouses and B&Bs are the most popular accommodation type for visitors in Norfolk followed by chain and independent hotels. However, due to Covid-19, this is likely to shift, linked to stronger demand for self-catering accommodation (Visit Britain & Visit England 2020) and lodge/caravan park holidays. Caravan and lodge bookings have increased 80% in East Anglia after the ease of the lockdown (Parkdeanresorts.co.uk, 2020).

Most visitors travel to Norfolk by car, especially those who have visited the county before and are 55+. Travelling by train is the second most popular mode of transport, especially to those who haven’t been to Norfolk and are also younger in age (Visit Norfolk, 2019). In general, “Norfolk is perceived as a place that offers unique experiences but not a place that someone can get to easily” (Visit Norfolk, 2019).

## Holiday planning

Younger visitors are less fixed on a destination and they usually start their holiday research with a number of places in mind. However, two thirds of visitors over 50 decide on a destination before researching their trip (Tripadvisor, 2018).

When planning their next trip, people usually ask their friends and family for advice and check the reviews on Tripadvisor. Visitors to Norfolk are most likely to be influenced by media such as newspapers and Tourist Board advertising while females are more likely to be influenced by social media (Visit Norfolk, 2019).

The majority of visitors to Norfolk heard about the county as a leisure destination through word of mouth. The internet is the most popular information source for planning holidays or a day trip to Norfolk and it is most likely to be used by younger audiences (18-34s) according to the 2019 Visit Norfolk’s Research Report. This means that in order to attract younger audiences, Norfolk as a destination needs to have a strong online presence (especially on social media) as young people usually look for destination trends and book their holidays online. In addition, people in younger age brackets (25-34s) are more likely to be attracted by a great deal and 16% started thinking of trip because of a bargain (Tripadvisor, 2018).

DMOs such as Visit Norfolk are most likely to be used to find information about the area and the types of activities available, but are less likely to be used for accommodation information. They are also more likely to be used by older audiences (55+) and people with high income (ABs).



In terms of planning accommodation, the majority of the participants in the 2019 Visit Norfolk Survey were most likely to book their accommodation online. ABC1s and younger people (18-34) are significantly more likely to use online resources. C2DEs and older visitors (55+) are more likely to book via telephone.

Figure 3. Primary motivators when booking accommodation (Barclays 2019)

Digitally enabled services will continue to gain popularity among younger audiences. Smartphone check-in is currently only offered by 15% of accommodation owners in the UK but would be incentive to book for 47% of the 25-34 age group and for 43% of 18-24s (Barclays, 2019). Due to Covid-19, the popularity of advance booking online and online services to minimise contact/increase safety is expected to increase in older demographics.

In general, due to Covid-19, British tourists will be looking for flexibility from businesses, citing deals and discounts, money back guarantees, and free cancellations as incentives to encourage them to book a trip in the next year (Visit Britain & Visit England, 2020).

## Spending

The 2019 Great British Tourist Report from Visit Britain suggests that 27% of overnight tourism spend in East of England is from residents in their own region, followed by residents in the South East of England (17.5%), London (15.2%), Yorkshire & the Humper (10.9%) and East Midlands (7.3%).

In terms of age group, the biggest spenders among the British holidaymakers are the 35-44 age group who typically spend £1072 on their UK holidays. Those are followed by the over 65s (£934) and the 25-34 group (£881). In addition, consumers based in London spend by far the most at £1458 (Barclays, 2019).

From those visiting Norfolk, the mean spend per adult per night on accommodation is £99.67 while the mean spending allowance per adult per day is £63.21 which means that an adult visiting in Norfolk spends on average around £163 per day on both accommodation and other activities (Visit Norfolk, 2019). In general, according to the 2019 Barclays Report, accommodation typically accounts for a quarter of the holiday budget, followed by meals out (17%), leisure travel (17%) and visits to museums, galleries or historical buildings (16%).

## “Experiences” and the Domestic Market

Experiential tourism has become more popular across the domestic market over the recent years. People are looking for real experiences which will help them to better understand the place they are visiting. They want to interact with locals and feel like a local themselves. Many are also looking to develop their skills during their holidays and combine fun with an opportunity to learn (Visit England, 2019).

The domestic market is more interested in experiences in rural areas/the countryside, in coastal areas or in smaller towns (Visit England, 2019). This interest is expected to rise due to Covid-19 as people are looking for space and quieter places. Norfolk can capitalise on this interest and develop experiences that showcase its countryside, the coast and the picturesque small towns.

The below table illustrates what kind of experiential activities interest the domestic market the most, which of them are well established and which have a potential for growth.

|  |  |
| --- | --- |
| **Domestic Market Interest on Experiential Activities** | |
| **Growth Potential** | **Established** |
| Chocolate making class | Experience Life behind the scenes |
| A remote wellness retreat | Street food tour & tasting |
| Photography class | Guided nature-experience |
| Baking school | Distillery or brewery experience |
| Cookery class | Vineyard tour and tasting |
| Cheese making class | A spa experience |
| Authentic craft workshop |  |
| Shadowing\* |  |
| Mindfullness or meditation class |  |
| Volunteering or working holiday |  |
| Foraging |  |

*\*e.g. go out with a park ranger as they care for the landscape*

**Table 1. Domestic Market Interest on Experiential Activities (Visit England 2019)**

A distillery/brewery experience ranks first in the preferences of the domestic travellers followed by the vineyard tour & tasting and the experience life behind the scenes (e.g. enjoy exclusive access to a historic building). Street food tour & tasting, guided nature and spa experiences are also among the most popular experiences across the UK holidaymakers. There are also experiences with high growth potential; chocolate making classes are ranked quite high in the domestic market interest table, much higher than cookery classes and baking schools. Norwich has a long history of chocolate making (Museum of Norwich, 2020) and this might be an opportunity to develop experiences on chocolate making that could attract domestic travellers. Photography and cheese making classes and remote wellness retreats are also quite popular across the UK domestic market.

*Culture, History & Heritage*

Experiencing local history, culture, heritage, “life behind the scenes” in general, is what domestic travellers are looking for when visiting a place within the UK. According to the 2018 Look Sideways-East Report, 68% of the survey participants gave culture as the reason for visiting the East Anglia region while 51% gave this as the main reason, thus making it clear that culture is an important driver of people to the region. The same report suggests that there is a strong desire from potential visitors for more cultural events beyond the big, known festivals and venues in places beyond the main cities. They also want those events spread across the year, not only during the peak season, something that shows the potential for developing events in the area in the off-season.

Norfolk has a lot to offer in terms of history/heritage; historic buildings, windmills, museums etc. The Visit Norfolk Research Report (2019) suggests that 36% of the visitors to Norfolk have history and heritage as their main hobby/interest and this forms the main reason why they visit the county. Interestingly, history and heritage were the second most popular hobby/interest for non-visitors (29%) which means that there is potential to attract additional visitors if Norfolk improves its offer.

*Nature & the Outdoors*

Some of the best things about Norfolk according to visitors in the 2019 Visit Norfolk Survey Research are the landscape, the beaches and the coastline, the wildlife and the beautiful countryside. Outdoor activities such as nature/wildlife-watching and walking/hiking are popular amongst those who have visited Norfolk for leisure.

Norfolk is brimming with nature and wildlife and has a lot to offer in terms of outdoor activities. The natural environment (countryside and the coast) appears to be the most ‘visited’ amenity in Norfolk (Visit Norfolk, 2019). Seasonality is an issue, however through enhancing the county’s natural assets and making them accessible all year round there is an opportunity to attract travellers during the off-season too.

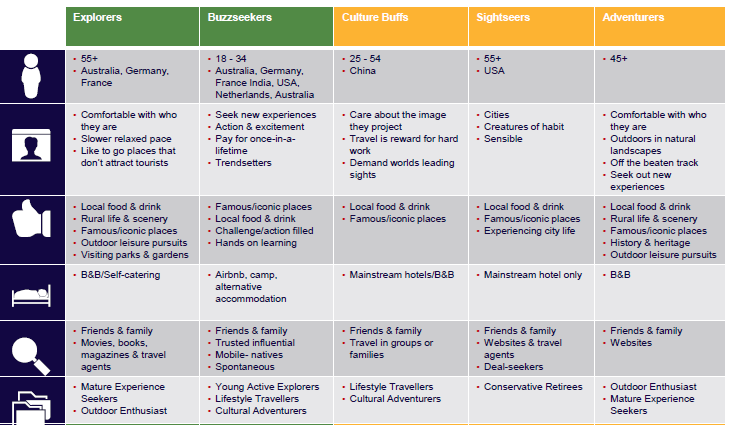
Nature and activities in the outdoors is also a way to attract younger demographics to the county. Young travellers in their late 20s and early 30s are longing for escape; 91% of those surveyed by Barclays for the 2019 Great British Staycation Report say escapism and distraction is a prime goal of their holidays while 70% state that a digital detox is a holiday objective. In addition, more and more people, mainly due to Covid-19, spend quite a lot of time in front of their computers, tablets etc. and this has a severe impact on their mental health and wellbeing. The need to get away from it all is increasing and there is no better way to do that than spending some quality time in the outdoors and Norfolk has a lot to offer e.g. Wellness Sailing in the Salt Marshes (The Guardian, 2020).

# 2. International visitors

## International Market Segmentation

Table 2 shows five segments developed by Visit Britain, which provide an insight into visitor profiles, travel attitudes and behaviours of the international market.

Based on the descriptions below, the ‘Explorers’ and the ‘Buzzseekers’ segments are those that can be targeted first as part of EXPERIENCE. These two segments are also the most popular across the key international markets we aim to target with EXPERIENCE such as France, Belgium, Germany and the Netherlands. The ‘Adventurers’ is also a segment to consider as it fits with the profile of an experiential traveller; an adventurer will seek new and off the beaten track experiences and loves the outdoors.

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**Figure 4. International tourism sub-groups (Visit England 2018)**

## European Target Markets

The countries selected as the key international target markets for EXPERIENCE are 4; France, Germany, Belgium and the Netherlands. Encouraging sustainable travel is key to the project therefore those markets were selected principally due to their close proximity to the UK. In addition, they are among the UK’s top 10 source markets for inbound visitors. Two of the largest for the East of England region are Germany and France.

Visitors from the countries with close proximity to the UK are expected to arrive first once travel restrictions have lifted and it is safe to travel abroad. Targeting those markets will be part of Phase 3. (For more info on Phases see section 5).

## France

France is the UK’s second largest market in terms of annual visits and the third most important for visitor spending in 2018 (Visit Britain, 2019). In the East of England, France is also one of the top markets and is ranked second (Visit Britain, 2020)

French Inbound Visitors - Key facts

* French prefer to travel in the off-season; 26% of the French inbound visitors travelled to the UK between and March and 24% between October and December.
* They mostly travel to the UK for holidays (45%), to visit friends and family (31%) and for business (20%)
* They travel to the UK by air (44%) and by the tunnel (39%) while only 17% of them use the ferry to come to the country.
* The average length of their stay is 5 nights.
* Those who belong in the 45-54 age group are the most frequent French visitors in the UK (20%) followed by those in the 25-34 and 35-44 age groups (both at 19%).
* They belong in the “Buzzseekers” & “Explorers” market segments
* Most of them travel on the own potentially for business (35%) or with their spouse/partner (29%)
* The areas in France they usually come from are: Ile-de-France (41%), Hauts-de-France (11%), Auvergne-Rhone-Alpes (8%) and Occitanie (8%).
* Word of mouth, a travel guidebook and information on search engines were the top influences in visiting Britain.
* Ease of access, the cultural attractions and experiencing a different culture were the top three motivations that made French choose Britain for a holiday. In addition, Britain is ranked highly by the French for historic buildings, cultural heritage and vibrant cities.
* The top three activities in the UK taken by French is shopping, dining in restaurants and going to the pub.

## Germany

Germany ranked 3rd in terms of annual visits to the UK and 2nd for spending in 2018 (Visit Britain, 2019). It is also the third largest market for the East of England region (Visit Britain, 2020).

German Inbound Visitors - Key facts

* Culture is the most important draw for visitors from Germany; they ranked the UK 3rd for culture out of 50 countries and cultural attractions are the top motivation for choosing Britain for a holiday
* They prefer spending time outdoors e.g. a national park, a garden or enjoy walking in the countryside or by the coast
* They are most likely to travel for holidays (48%), business (25%) and to visit friends and family (23%)
* They usually travel between April and June (31%) and July and September (29%), however 24% of them will travel between October and December. Only 16% of the German Visitors come to the UK between January and March.
* The majority of the German visitors (77%) come to the UK by plane, 19% by ferry and only 4% by tunnel
* The areas German visitors usually come from are in the West and South Germany, with Nordrhein- Westfalen to be the area with the most German visitors to the UK.
* The average length of stay is 5 nights
* Most German visitors are between 25 and 54 years old. Only 12% of the German visitors are between 55 and 64 years old and 11% are between 16 & 24.
* They belong in the “Buzzseekers” & the “Explorers” market segments
* They usually come to the UK on their own (35%) or with their spouse/partner (29%)
* Friends, family and colleagues are the top influence for visiting Britain followed by the search engines and a travel guidebook.
* The top three activities they take in the UK is dining in restaurants, shopping and going to the pub.

## The Netherlands

The Netherlands rank 6th in the global ranking for inbound visits to the UK and 8th for inbound spend in 2018 (Visit Britain, 2020). The East of England region also ranks 6th in terms of nights spent in the UK from Dutch visitors in 2018 (Visit Britain, 2019).

Dutch Inbound Visitors - Key facts

* Although most Dutch visitors prefer to travel between April and June (28%) and July and September (27%), there are still plenty of them (26%) who are keen to travel between October and December. Only 20% of the Dutch will visit the UK between January and March
* They are most likely to travel to the UK for holidays (41%), business (29%) and to visit friends and family (25%)
* They usually come to the UK by air (59%) and by sea (29%). Only 13% of them come by tunnel.
* The average length of their stay is 4 nights.
* They are most likely to be between 25 and 44 years old (23%), 45 and 54 (21%) and 25-34 (19%). Only 14% and 11% of them are in the 55-64 and 16-24 age groups respectively.
* They usually travel on their own (35%) or with a spouse/partner (29%)
* The majority of them come to the UK from the Noord Holland, Zuid Holland and Utrecht regions.
* They belong in the “Buzzseekers” & the “Explorers” market segments.
* Word of mouth, information on search engines and accommodation provider/hotel websites are the top three influences in visiting Britain
* Cultural attractions are the top motivation for choosing Britain for a holiday followed by vibrant cities, countryside/natural beauty, a good deal and the possibility of VFR.
* Dining in restaurants, shopping and going to the pub are the top 3 activities taken in the UK by Dutch visitors

## Belgium

Belgium ranks 9th for inbound visits to the UK and 18th for inbound spend in 2018 (Visit Britain, 2019). Although not one of the biggest markets for UK inbound tourism, it is worth considering due to close proximity to the UK and ease of travelling via Eurotunnel or Eurostar.

Belgian Inbound Visitors - Key facts

* The majority of the visitors from Belgium will prefer to travel between April and June (28%) or between July and September (26%). However, not far below, 23% of them will travel in the UK during the off-season too.
* Holidays is the most popular reason to travel to the UK (46%) followed by VFR (23%) and business (22%).
* 59% of the visitors come to the UK by the tunnel, 24% by sea and only 17% of them by air. Eurostar is the most frequently-chosen option for visiting the UK.
* The average length of stay is 4 nights
* Dining in a restaurant is the number one activity for Belgians when visiting the UK followed by shopping.
* A third of Belgian visits involve sightseeing of famous monuments/ buildings, often involving a visit to a museum, art gallery, castle and/or historic house.
* They have a higher than average propensity to purchase food and drink.
* More than one in five like to socialise with locals
* More than half of Belgians book their holidays online
* Sustainability/environmentally friendly aspects play a role when Belgians choose a destination

## Experiences and the European market

Like the domestic market, the European market is also looking for meaningful experiences that offer an authentic and unique view of the destination they are visiting and make them create distinctive memories that will take back home and share with their friends and family. A combination of fun and learning is what the inbound visitors are looking from their experiential activities in England (Visit England, 2019).

Although most inbound travellers prefer to stay in London (33%) or in another large town/city (20%) when they undertake experiential activities, 29% of them said they would choose a rural area/countryside for experiences, a smaller town (23%) or the coast (19%) (Visit England, 2019).

The table below illustrates what type of experiences the international travel market seeks which of them are well established and which have a potential for growth.

|  |  |
| --- | --- |
| **Inbound Market Interest on Experiential Activities** | |
| **Growth Potential** | **Established** |
| Vineyard tour and tasting | Experience Life behind the scenes |
| A remote wellness retreat | Street food tour & tasting |
| Cookery class | Guided nature-experience |
| Photography class | Distillery or brewery experience |
| Chocolate making class | A spa experience |

**Table 2. Inbound Market Interest on Experiential Activities (Visit England 2019)**

French, Germans and Dutch rank first any activities that will offer them the opportunity to experience the life in England but “behind the scenes”. Distillery or brewery experience and guided nature experiences are ranked second and third respectively among Germans, French and Dutch. Street food tour & tasting is also within their top 5.

In terms of vineyard tour and tasting, while the interest from international markets is high and there is a potential for growth through advertising more effectively the UK’s wine making credentials, 40% of the inbound travellers said that other countries have better experiences on offer and it is more likely to book in another country.

Skills based learning experiences such as photography classes have a growth potential when it comes to the Dutch and French markets but they are not so popular among Germans. Cookery classes are in the top 10 activities for Germans and Dutch. Unlike French, they would also like to try a chocolate making class in England. Finally, a remote wellness retreat which is about spending quality time relaxing away from technology ranks high among Germans and French.

In terms of how inbound travellers booked or would book an experiential activity, half of them said that they book activities before they leave home, mainly as part of a package. If they are not part of a package, they will usually book directly with the provider. When they decide to not book in advance is because they want to see what the activity is like before booking (mainly French visitors) or because they want to get local recommendations of where/how to do this activity (mainly German visitors). These issues can be easily tackled with the use of virtual/augmented reality and with giving the opportunity to travellers to contact locals before their arrival to the destination.

# 3. Trends in experiential tourism

Experiential travel has become very popular over the past few years. 70% of global consumers prefer to spend on an 'experience' over buying goods (Blacktomato.com, 2020). When on holidays, people are now seeking to deeply connect with the places they visit, their culture, history and people. They seek off-the-beaten path and ‘live like a local’ authentic experiences. “Mass tourism is no longer sufficient” (Peak & Skift, 2014). The global lockdown and restrictions on travel has reinforced this as people are now looking for more authentic experiences closer to their home (cbi.eu, 2020).

## Authenticity/Genuine Experiences

People are now looking to truly immerse themselves into the place they are visiting, try local food and drinks, attend local events & festival and interact with the locals. They want to live like a local because that is the main way to get the essence of a place and its people. Vallum Farm in Northumberland showcase the produce of their land in the farm’s Tea shop, Restaurant and Farm Shop by working together with the local community of artisan growers, smokers, bakers, chefs and ice cream makers. Travellers can choose from a wide range of experiences from wine & cheese matching to ice cream making sessions. In addition, eco-tourism is booming and gives rise to volunteer tourism, homestays and ‘dine at home’ experiences” (NITB, 2019).

## Sustainability

People are more concerned than ever about their impact on the environment. They want to reduce their carbon footprint when travelling, thus they fly less, try local organic and slow food. They are opting for slower travel, visiting less destinations and staying put longer e.g. renting an apartment from a local, visit the neighbourhood market etc. (forbes.com, 2019). They also select accommodation with green credentials. Those green credentials and practices are what differentiates one business over another. For example, GreenWood Forest Park in Wales not only offers families an outdoors adventure including an experience on the first people-powered rollercoaster, but they also plant around 400 trees a year, harvest rainwater for flushing toilets and recycle most of their waste (NITB, 2019).

## Time for me

Travellers are now prioritising their needs. They ask ‘why am I travelling’ rather than ‘where’. They are looking for a digital detox, they want to disconnect from a fast-moving world and spend time for themselves. They embrace JOMO (the joy of missing out) and they let curiosity guide the way even if that means going joyfully off piste (blacktomato.com, 2020). Enjoying a view from their B&B, or going for a gentle walk in the glens to getting involved in activities or enjoying a relaxing massage are some of the things modern experiential travellers are looking for. For example, Brambles Art Retreat in Devon offer painting classes in a 17th century cottage and take visitors outdoors to paint the natural landscape (NITB, 2019).

This trend is expected to rise after Covid-19. The current situation has a big impact on people’s mental health and due to the lockdown people now spend more time on their laptops/online. This makes them look for experiences which will help them get away from it all and will improve their mental health and wellbeing.

## Deeper connection with Nature

Travellers are looking for a deeper and meaningful connection with the natural world. “From forest-bathing, with its soul-enriching passages into ancient woodland, to astrotourism, where travellers will journey to places where the night sky is revealed in its greatest splendour. Recent Euromonitor International research shows that some 80% of the global population lives under light-polluted skies. In response, travellers are seeking out destinations where they can find clean air, open skies, and nature unbound. Sometimes, the simplest way to get back our night vision is to turn off the lights” (blacktomato.com, 2020).

## Microgapping/Microadventures

Microgapping is about more in-depth mini holidays that often have an element of learning or giving something back. Younger people are starting to respond positively to those UK breaks that appeal to their passions (Barclays, 2019).

The idea behind microadventures is people choosing to travel closer to home, possibly head into nature and explore places only a few miles away from where they live. All they will need is camping gear, a good pair of boots and a rucksack but not much else (Globetrender, 2019).

## Desire to find good holiday deals

Travellers are now looking to fit more and more experiences during their holidays and they prefer destinations that offer value for money. With the boom of experiential travel, hotels all over the world are acting like community portals by introducing guests to popular local experiences (Peak & Skift, 2014).

According to a 2019 Barclays report, over half of all consumers up to age 45 said they would more likely book if for example a hotel would provide them discounts on treatments at a nearby spa, or activity providers would join forces to provide multi-day discounts across the group. According to the same research, young people between 18-24 are looking for good value for money offers (62%) which give them access to a range of experiences. However, at present, only a fifth (20%) of accommodation providers in the UK join forces with neighbouring hospitality businesses to provide offers in this way.

## Second City Tourism

Crowded places in cities such as London, Venice and Paris are no longer that attractive to travellers. They now seek to travel in quieter, lesser known or off-the-beaten path destinations (Forbes.com, 2019). The issue of overtourism was a rising concern which has become more prevalent due to the pandemic. Therefore, less touristic places and “second cities” are becoming more and more popular as they give travellers the opportunity to discover new “untouched” places where they would be able to practice social distancing.

## Shoulder & off-season Travel

Long lines in museums and monuments, crowded beaches, limited interactions with locals and expensive holiday packages are not that attractive any more to many travellers. Travelling in the off-season or during should months is far more affordable and can offer many chances to travellers to have more authentic connections with locals. The weather might not be ideal during the off-season but the positives seem to outweigh the negatives (Forbes.com, 2019).

# 4. Experiential tourism in Norfolk after Covid-19 – Opportunities & challenges

## Opportunities

Travelling abroad for holidays is no longer viable for the majority of British residents. This offers the opportunity to promote domestic tourism and encourage more people to spend their holidays in the UK in the coming months and years. “Domestic tourism accounts for 78% of total tourism spend and for most businesses and destinations it is the domestic visitor that ensures economic survival” (Visit Britain & Visit England, 2020). Over the past few months, the focus has been on the domestic market and Norfolk has the potential to attract visitors not only from the nearby counties but also from everywhere in the UK.

Many people have started a new hobby during the pandemic; from cooking and gardening to painting and knitting and they seem to be willing to continue honing their skills even when on holidays. The Royal Horticultural Society in Devon offers gardening courses which cover everything from plant photography to composting while in Ireland people who have taken up knitting during the pandemic have the opportunity to go on a six-night knitting retreat.

The recovery of the tourism sector from the current crisis needs to be founded on sustainability, social inclusion and the restoration and protection of the environment (UNWTO, 2020). These changes will make the tourism sector more resilient to any future crises. Adopting a more sustainable tourism model is crucial for a quicker recovery of the tourism sector in Norfolk too. It’s important to repurpose tourism and create stronger connections with local communities. “Capitalising on the new services that tourism businesses and creative industries have been providing to destinations in times of crisis brings an opportunity to create stronger ties with local communities, integrate local wisdom and enhance local satisfaction with tourism” (UNWTO, 2020). Accelerating the decarbonisation of tourism operations, engaging the tourism sector in carbon removal, prioritising sustainable food approaches for circularity and shifting towards a circularity of plastics are also key aspects of the new tourism model according to WTO. The tourism and culture sectors must continue to work together to inspire a more sustainable future for cultural tourism. Marketing strategies in tourism are highlighting local cultural expressions not only to address new audiences, but also to inspire responsible travel (UNWTO, 2020)

## Challenges

Safety is one of the biggest concerns for someone who travels during the pandemic. People want to feel safe when on holidays something that is very important as this sense of safety will help them relax and enjoy their holidays. Tourism businesses need to adapt their services to be able to give this sense of safety to the visitors especially now as we are heading towards the off-season. According to a recent report from Visit England, 76% of people would feel anxious or uncomfortable using indoor attractions or

amenities. This means that businesses and other tourism providers that want to attract out of season visitors need to very carefully design their offer to make their visitors feel comfortable indoors.

In addition, due to the pandemic, people have gone back to non-environmentally friendly practices. Google data shared with Visit Britain show that Brits will prefer to travel in their own cars rather than on public transport (Visit Britain & Visit England, 2020). The use of single-use plastic in the tourism sector has also been increased.

Finally, Brexit still remains a concern for visitors coming from the EU. Negotiations are still ongoing with uncertainty on how UK tourism will be impacted. Depending on the agreement, Europeans may feel ‘unwelcome’ in the UK and concerns around visas will rise (Visit England, 2018). On the other hand, interest in visiting the UK post Brexit might increase as people from well-informed EU markets would like to experience the ‘real England’ and choose to visit more rural areas instead of London (Visit England, 2017). Many EU visitors also expect that it is going to be cheaper to visit the UK due to the fall in the value of the pound (Visit England, 2018).

# 5. Experiential tourism offer in Norfolk after Covid-19 (A phased approach)

Data suggest that domestic travel will be the first to increase, with nearly two in three respondents from Tripadvisor’s survey on Covid-19 saying they will travel domestically within the next six months, and one in three saying within the next three months. Based on current trends, destinations should focus travel efforts at a more local level first.

According to Visit Britain & Visit England (2020), the domestic tourism market is expected to recover much quicker than the inbound one. The next step will be the neighbouring markets, potentially aided by bilateral agreements. This phased approach will also be followed here in Norfolk. The recovery and the opening up of the Norfolk tourism will have three main phases.

Phase 1 – Local/Regional; target visitors from Norfolk or regions close to Norfolk

Phase 2 – Domestic; target visitors from anywhere in the UK

Phase 3 – Visitors from neighbour countries

## Phase 1 – Local/Regional Visitors

Since the ease of the lockdown in the UK, people have started booking their holidays but this time much closer to their home. They either choose to spend their holidays in other areas within their county or in areas in neighbouring counties. Tripadvisor expects that nature and beach destinations are early beneficiaries of increasing demand, as consumers opt for relaxation and outdoor space. In Norfolk someone can find both all year round so with a very carefully designed tourism offer and well-developed experiences there is opportunity to attract both locals and people living in nearby counties.

According to a Visit England report focused on experiential activities, the shorter the drivetime the greater potential to attract travellers. If the drivetime extends beyond one hour then the amount of people interested in the activity who would be willing to travel for longer falls rapidly. This isn’t uniform though. Alongside travel links, historical connections between areas need to be taken into account as well the types of people who live there (Look Sideways-East, 2018). For example, Norfolk has a long historical connection with East Midlands which can be utilised to attract visitors from that area.

In general, people in areas closer to Norfolk are the key target market for the off-season. There are still many of them who haven’t managed to go on a holiday during the summer and they will be looking for mini breaks in the off-season but closer to home. A significant number of participants from East of England, East Midlands, Greater London and South East in a 2019 Visit Norfolk Research Survey responded that that they find travelling to Norfolk quite or very convenient so targeting visitors from those areas is the first step for the recovery of tourism in Norfolk.

There are also plenty of people in those areas who have friends and family in Norfolk (or live in Norfolk but their family and friends live in other areas within the county) and since the ease of the lockdown were the first who visited the county and will continue to do so. Visit Britain & Visit England (2020) argue that the trips that belong in the VFR category will be the first to recover as people are longing to see their loved ones, adding that this market will choose to spend their time with families and friends in rural or coastal destinations. As a result of this, the demand for multigenerational holidays is very likely to increase and destinations will need to be able to offer activities that suit all ages.

## Phase 2 – Domestic Visitors

Staycations are on the rise. Travel abroad search terms are down by more than half but 103% increase in UK travel searches according to a post-Covid19 Staycation report from Parkdean Resorts. According to the same report, 44% of the participants responded that a UK break feels more likely to go ahead than an international holiday. The fact that they won’t have to self-isolate if they spend their holidays in the UK and at the same time help boost the UK economy were among the main reasons why people choose staycation.

Destinations that people can reach by car, train or ferry and lesser-known and more-remote places will become more appealing for a post-lockdown escape (travelweekly.co.uk, 2020). Rural destinations and seaside towns are and will continue to be the most popular choices for Britons for their staycation. A nationwide survey from Halti has ranked Norfolk as the best place to have a staycation. The result was based on multiple factors; green areas, air quality, countryside walkways, etc. Norfolk is ranked first in the green areas list and has the highest percentage of region covered in green space for exploring and adventuring.

In addition, Norwich is ranked 4th for domestic markets according to the Colliers UK Hotel Recovery Index 2020. The same research concludes that all areas who are not heavily reliant on overseas visitors and MICE business and have traditionally enjoyed a higher proportion of domestic visitors are expected to outperform compared to others.

However, it is worth mentioning that the staycation trend was on the rise even before Covid-19. Data from the 2019 “The Great British Staycation” report from Barclays suggest that 3 in 10 domestic holidaymakers (31%) plan to spend more holiday time in the UK in 2019 than they did in previous years. In addition, more than half of 25-34 year olds surveyed (52%) plan to increase their UK-based holiday time. The top reasons given by the participants for spending more holiday time in the UK were convenience, affordability and to replicate previous holidays.

## Phase 3 – Visitors from neighbouring countries or Countries that the UK has bilateral agreements

Visit Britain’s central scenario for inbound tourism to the UK in 2020, as of August 25th, is for a 73% decline in visits and a 79% decline in spending. This means that Phase 3 will start much later, potentially from the second half of 2021 or even later. Oxford Economics forecast it will not be until 2023/24 that inbound visitor volumes will recover to their pre-Covid19 level (Visit England & Visit Britain, 2020).

Phase 3 will target neighbouring countries such as France, Belgium, the Netherlands and Germany. Short-haul flights are expected to recover first; over a quarter of the consumers (28%) are more likely to take a short international flight (up to 3 or 4 hours) post Covid-19 (Tripadvisor, 2020).

In addition, people are now more conscious of their carbon footprint therefore they deliberately choose destinations closer to their home country. Sustainability needs to be a key aspect of tourism in the post-Covid19 era so it is very important to target neighbouring markets as part of the new experiential tourism offer here in Norfolk.

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