BLUE SAIL

Final Report

International Segmentation for Sussex

June 2022

UK Government

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1. ABOUT THIS PROJECT

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1. ABOUT THIS PROJECT

In April 2022 Blue Sail were commissioned to review best prospect international segments for Sussex focusing on premium products and experiences, with a particular focus on wine tourism.

Over the last few years the local authorities, tourism organisations and business partnerships within Sussex have been working together to support, grow and promote the tourism sector.

In 2021 Blue Sail produced a vision and medium-term action plan for the visitor economy. This project builds on that work focusing specifically on the international market opportunity for Sussex.

The brief for this project was to identify up to 10 potential international segments, with more detail on 2 or 3 of these which offer most immediate growth potential.

Our work included:

- Audit and mapping of those products and experiences most likely to appeal to international markets
- Consultation with a few key partners and stakeholders within Sussex
- Detailed review and analysis of international geographic markets and visitor typologies
- Interviews with VisitBritain marketing personnel in London and seven on-territory offices.

This report summarises our findings and sets out how Sussex's tourism organisations working collectively and individually can target international markets.

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2. THE OFFER

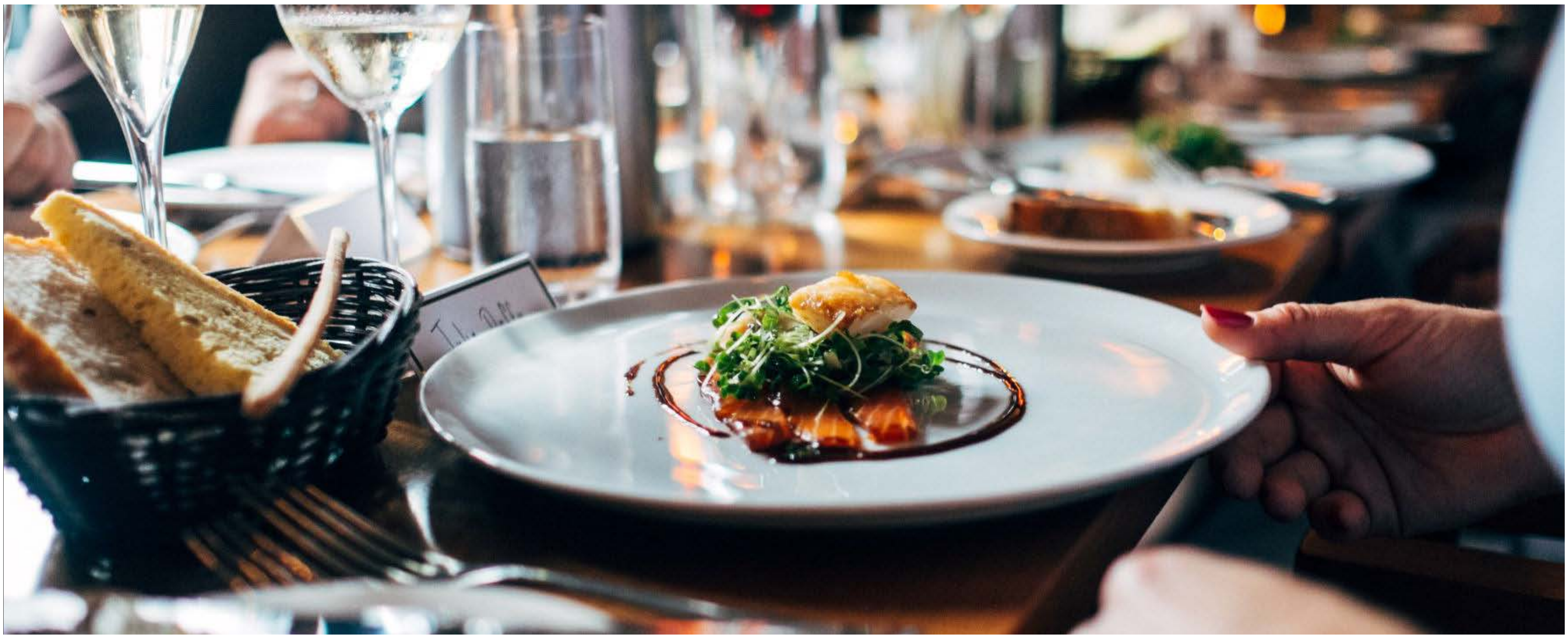


Photo by Jay Wennington on Unsplash

2. THE OFFER

An audit of the experiences that Sussex had to offer reveals an exciting range of ‘premium products’ of a quality and distinctiveness to cut through a competitive marketplace and stand out to international visitors.

The experiences can be grouped into seven categories. These include well-known or outstanding landscape locations and destination hotels and towns to build a rounded offer capable of attracting longer stays:

- Gardens
- Wine & food
- Culture & heritage
- Events & activities
- Landscape icons/locations
- Short break towns
- Destination hotels.

The experiences mapped by category onto a live Google Map are shown here. There is easily a critical mass of high-quality experiences across the categories, well-distributed across Sussex.

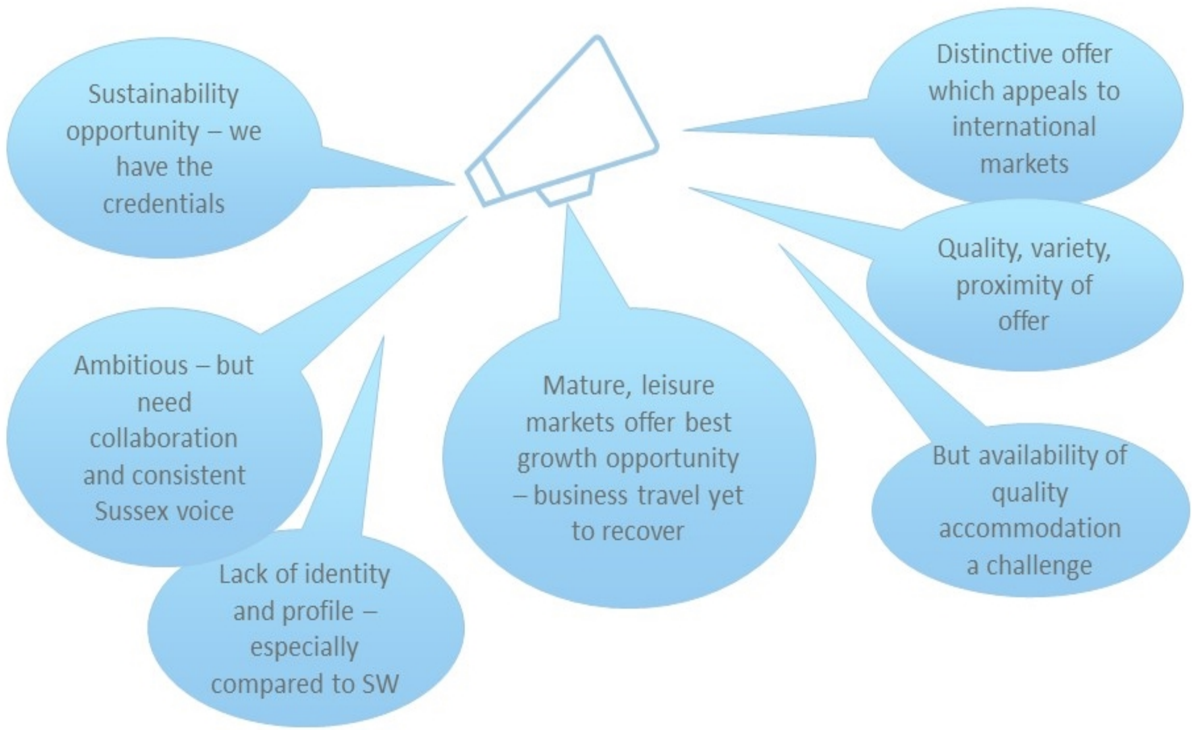
The products mapped here are illustrative and not definitive. Others can be added, and new ones included as they emerge over time. And of course, more can be identified as needed for particular campaign activity.

STAKEHOLDER VIEWS

Conversations with a range of partners and stakeholders revealed remarkably consistent views of what Sussex offers and what the opportunity is.

It is clear that Sussex stakeholders understand what is unique about the county and the vital need to work together to develop and communicate this to build profile and identity.

Sustainability is viewed as a particular strength and is an area for Sussex to 'claim'. This message can be woven through promotional activity as well as informing product development.



3. MARKET ANALYSIS

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3. MARKET ANALYSIS

The market analysis looked firstly at geographic markets and then at the visitor types or segments identified by VisitBritain. From this a long list of potential targets emerged.

Markets with the greatest potential to deliver high-value visitors to Sussex were identified using the following criteria:

- **Size**: the number of inbound visitors to Britain
- **Value**: the spend delivered by these visitors
- **Growth potential**: analysis of the average annual growth of the market between 2003-2019 and likely continued growth
- **Market maturity**: the proportion of repeat versus new visitors to Britain with market maturity as an indicator of likelihood to try a new experience/travel outside of London
- **Purpose of visit and seasonality** as supporting factors

Geographic Market Summary

Anglophone long haul markets (USA, Australia, Canada) provide a ready opportunity for Sussex due to familiarity with Britain and their propensity to engage in the type of activities on offer in Sussex on a visit to Britain.

These markets offer relatively long stays in GB and potentially will engage with a variety of Sussex products and experience.

France, Germany and Netherlands are short haul markets with experience of Britain and an appetite to experience life outside of London. They are also likely to respond to a year-round offer.

While China and the Gulf states offer future growth potential and access to high-spending visitors, there is a need to be realistic about the relevance of Sussex product in the context of an urban and London-centric visitor with specific cultural expectations around food, drink and accommodation.

Visitor Typology Summary

The Explorer segment has an excellent market fit with the Sussex offer. They enjoy a relaxed pace, embrace local culture (way of life, cultural heritage, contemporary culture, iconic places) and are nature lovers. They are open to new destinations and ideas – and are willing to spend to get what they want.

The Buzzseekers segment are similar in their love of local culture and new places but look for holidays full of action and excitement.

Other VisitBritain segments – Adventurers, Culture-Buffs and Sightseers are not a great fit. Adventurers enjoy extreme off-the beaten track destinations, Culture Buffs are brand focused and like well-known, high-status destinations; Sightseers are city focused visiting familiar destinations.

The next few pages unpack the markets and typologies in detail.

A longlist of 11 markets with potential to deliver high-value visitors

Long haul markets can deliver high-spending visitors on longer stays

Short haul markets can deliver visitors for an all-year-round offer

Colour key: Highest → Lowest

		Long Haul Mkts					Short Haul Mkts					
		USA	Australia	Canada	China	*GCC**	France	Germany	Neth'lands	Italy	Spain	Sweden
Volume	Global rank	**1**	**10**	**14**	**13**	***9***	**2**	**3**	**7**	**6**	**5**	**15**
	Annual visits (000s)	4,499	1,063	874	883	*1,212*	3,561	3,233	1,987	2,197	2,319	789
	Growth (avg. annual growth 03-19)	2%	3%	2%	19%	*10%*	1%	2%	2%	4%	5%	3%
Value	Global rank	**1**	**5**	**12**	**2**	***2***	**4**	**3**	**10**	**6**	**7**	**21**
	Total annual spend (£m)	£4,184	£1,174	£734	£1,710	*£2,605*	£1,398	£1,567	£796	£1,109	£977	£400
	Growth (avg. annual growth 03-19)	4%	5%	6%	22%	*19%*	5%	4%	4%	6%	5%	6%
Spend/nights	Avg spend per visit	£930	£1,104	£840	£1,937	*£2,267*	£393	£485	£400	£505	£421	£507
	Avg nights per visit	6.5	12.8	8.9	16.3	*13.1*	4.8	5.5	4.3	5.8	6.5	4.7
	Avg spend per night	£143	£86	£94	£119	*£175*	£82	£88	£93	£87	£65	£108
		%	%	%	%	*%*	%	%	%	%	%	%
Maturity	% making repeat visits to UK	72	62	76	29	*82*	74	76	85	74	74	86
Share of Nights	% nights in London	49	29	34	39	*46*	41	32	26	49	41	50
	% nights in South East	10	10	12	10	*14*	15	15	17	10	14	11
Purpose of Visit	% visiting on Holiday	49	42	40	58	*50*	43	46	40	53	45	38
Seasonality % visiting in…	Q1	17	13	15	13	*18*	23	21	20	22	23	25
	Q2	29	25	28	23	*20*	26	25	23	25	27	25
	Q3	32	40	36	44	*37*	25	29	30	29	23	24
	Q4	22	22	21	19	*25*	26	25	27	24	27	26

**for analysis purposes GCC - Gulf Cooperative Council (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates) aggregated as a single market*

Source: International Passenger Survey, Office for National Statistics, 2019

Long haul inbound market behaviours point towards USA, Australia and Canada

Large, mature markets with strong cultural links to Britain:

‘Priority’ markets
Well-placed to yield high-value visitors in the short to medium-term, if profile of Sussex as a destination can be amplified

USA	Australia	Canada
▸ #1 by visits and value ▸ Experienced travellers with knowledge of the UK and appetite for life outside of London ▸ Will pay for great service and distinctive experiences	▸ #10 in visits and #5 in value ▸ Adventurous travellers who enjoy relatively long stay (12.8 nights) ▸ Cultural and family links to UK (VFR* #1 reason to visit: 45%)	▸ #14 in visits and fastest growing anglophone market by value (avg. +6% YOY**) ▸ Strong cultural ties to Britain and a willing to visit outside London ▸ VFR is main reason to visit (41%), followed by holiday (40%)

Fast-growing markets where Britain (London) is an attractive destination:

‘Development’ markets
Long-term growth potential if Sussex product can developed to cater to visitors’ needs

China	GCC (Gulf Cooperation Council analysed as a single mkt)
▸ #13 in visits and 2nd in value ▸ Fast growing (+19% in visits YOY since 2003) ▸ Most visitors coming to the UK for first time (71% new). Cities a priority ▸ Main visiting purpose is for a holiday, & over a long stay (avg. 16.3 nights)	▸ If a single entity, would be #9 by visits and #2 by value ▸ Britain is a highly attractive destination with 82% of GCC visitors having travelled there before (figure excludes expats) ▸ London is the key draw ▸ Main motivation to visit is for a holiday

**VFR = Visiting Friends & Relatives*
*** YOY = year on year*

Short haul inbound market behaviours point towards France, Germany and Netherlands

Established markets willing to explore outside of London:

'Priority' markets
Opportunity to amplify Sussex profile via a relevant AYR* offer

France	Germany	Netherlands
▸ Top European market in visits (global rank: #2) ▸ London is a key draw, but SE ranks #2 on share of nights (15%) ▸ An even spread of visits across the year – potential for year-round offer	▸ #2 largest European market for visits; biggest European market for spend (global ranks: #3 for visits/#3 for spend) ▸ SE #2 on share of nights at 15% ▸ Visit mainly for holiday with a slight preference for Q3	▸ Ranked #7 for visits and #10 for value ▸ Lots of experience of visiting Britain (85% repeat visitors); willing to travel outside of London with 17% of nights spent in South East (SE)

Visitor and value growth, but need to be persuaded to look outside of London:

'Development' markets
Opportunity to drive new visits by creating awareness around Sussex as a destination

Italy	Spain	Sweden
▸ Global rank #6 for visits and value ▸ Relatively strong YoY growth in visits (+4%) and value (+6%) ▸ London dominant in overnights (49% share). 1 in 10 nights spent in SE	▸ #5 for visits and #7 for value ▸ Visitors from Spain stay slightly longer (6.5 nights vs 5.3 avg**), but spend per night is lowest of European markets shown here (£65 vs. £83) ▸ London the GB gateway	▸ #15 for visits and #21 for value ▸ Strongest YoY value growth of European markets identified here (+6%) and highest avg spend per night at £105 ▸ Almost nine in ten have been to Britain before; London dominant in share of nights at 50% (SE: 11%)

** AYR = all year round*

***average of European markets shown on this chart. Does not include all European markets*

Assessing markets by their propensity to engage with the types of activity and experience on offer in Sussex allows priorities to emerge.

Alongside market potential due to size and growth, we also need to assess visitors' interest in engaging with the Sussex product offer.

VisitBritain data assessing the propensity of visitors in each market to engage with key product at a Britain level can indicate product categories which could act as the strongest draw for visitors to Sussex.

The following pages assess the geographic markets against the Sussex offer and gives an indication of the different types of product category to lead with when trying to build a profile for Sussex and engage with the markets.

Key:
Market's relative propensity to engage with an activity benchmarked vs. global average

Above Global Average

In line with Global Average

Below Global Average

Conclusion

Based on the market size analysis and the activity propensity (covered in the next three pages), one short haul and one long haul market are recommended as a focus for promotional activity.

Germany and USA

- Willingness to explore outside London
- Interest in coast and countryside
- Good fit with heritage, culture and local food & drink
- Plan in advance so relatively easy to inspire with ideas and influence purchase
- Purchase through travel trade so relatively easy to reach

Of the long-haul markets USA, Australia and Canada have the strongest engagement with the types of activity visitors can experience in Sussex

Propensity to engage in key product categories: Long Haul Mkts. Analysis at Britain level

	USA	Aus	Can	China	GCC
Food & Drink					
Restaurants	❤	❤	❤	❤	❤
Pubs	❤	❤	❤	👎	👎
Socialising with locals	❤	❤	❤	👎	👎
Wine tour/vineyards	👍	👎	❤	❤	👎
Arts/Culture/Heritage					
Museums/Galleries	❤	❤	❤	❤	👎
Theatre/Opera/Ballet	❤	❤	❤	❤	👍
Heritage sites	❤	❤	❤	❤	👎
Events					
Festivals	👍	❤	👍	👍	👍
Watch sports	👍	❤	👍	👍	👍
Landscape/Nature					
Countryside	❤	❤	❤	❤	👍
Coast	❤	❤	❤	👍	👍
National parks	👍	❤	❤	❤	👍
Parks/Gardens	❤	❤	❤	❤	❤
'Brighton' ***(GB activities as a proxy for Brighton)***					
Sightseeing	❤	❤	❤	❤	👍
Shopping	👍	👍	❤	❤	❤
Pubs	❤	❤	❤	👎	👎
Bars/Nightclubs	❤	❤	❤	👎	👎

Source: International Passenger Survey by ONS 2019 / VisitBritain

Of the short-haul markets Germany, Netherlands and France have the greatest affinity with the types of activities available in Sussex

Propensity to engage in key product categories: Short Haul Mkts. Analysis at Britain level

	France	Germany	Netherlands	Italy	Spain	Sweden
Food & Drink						
Restaurants	👍	👍	👍	👎	👍	👍
Pubs	👍	❤□	❤□	👍	👍	❤□
Socialising with locals	👍	👍	❤□	👎	👍	👍
Wine tour/vineyards	👎	👍	👎	👎	👍	👍
Arts/Culture/Heritage						
Museums/Galleries	👍	👍	👎	❤□	👍	👍
Theatre/Opera/Ballet	👍	👎	👎	👍	👍	👍
Heritage sites	👍	❤□	👎	👍	👍	👍
Events						
Festivals	👍	👍	👍	👍	👍	👍
Watch sports	👍	❤□	❤□	❤□	❤□	❤□
Landscape/Nature						
Countryside	👍	❤□	👍	👎	👎	👎
Coast	👍	❤□	👍	👎	👍	👍
National parks	👍	👍	👍	👍	👍	👍
Parks/Gardens	👍	❤□	👎	❤□	👍	👍
'Brighton' ***(GB activities as a proxy for Brighton)***						
Sightseeing	👍	👍	👍	👍	👍	👎
Shopping	👍	👍	👍	👍	👎	👍
Pubs	👍	❤□	❤□	👍	👍	❤□
Bars/Nightclubs	👍	👍	👍	👍	👍	👍

Source: International Passenger Survey by ONS 2019 / VisitBritain

Identifying priority and development markets over the short and long term. From the longlist of 11, USA and Germany are recommended as having most growth potential. However, products developed for these markets will also be relevant for other markets if opportunities arise.

These are geographies are best positioned to deliver valuable visitors in short to medium-term

Priority markets:

US USA	CA Canada	AU Australia
FR France	DE Germany	NL Netherlands

These markets offer long-term potential, but require further development and planning

Development markets:

CN China	AE GCC	
IT Italy	ES Spain	SE Sweden

VISITOR TYPES

VisitBritain has identified five global visitor types with differing needs when it comes to travel and visiting Britain.

The VisitBritain data categorises visitor types on their needs, behaviours, and attitudes to travel.

From this analysis it's possible to size the market of these different visitor groups in key geographies, understand them and their lifestyles, and to develop product and marketing activity to target them

Buzzseekers
Free spirited, like holidays full of action & excitement

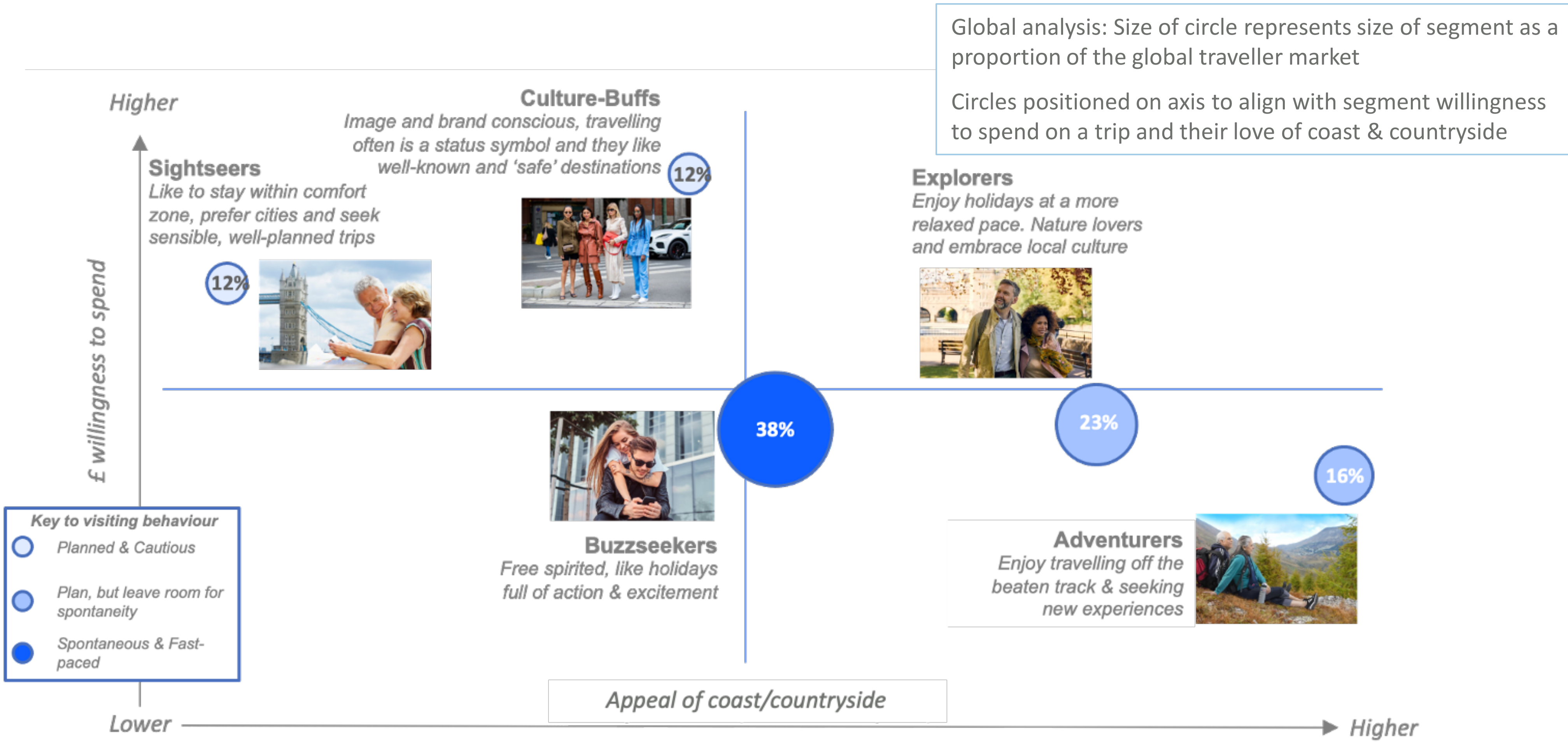
Adventurers
Enjoy travelling off the beaten track & seeking new experiences

Sightseers
Like to stay within comfort zone, prefer cities and seek sensible, well-planned trips

Explorers
Enjoy holidays at a more relaxed pace. Nature lovers and embrace local culture

Culture-Buffs
Image and brand conscious, travelling is a status symbol and they like well-known and 'safe' destinations

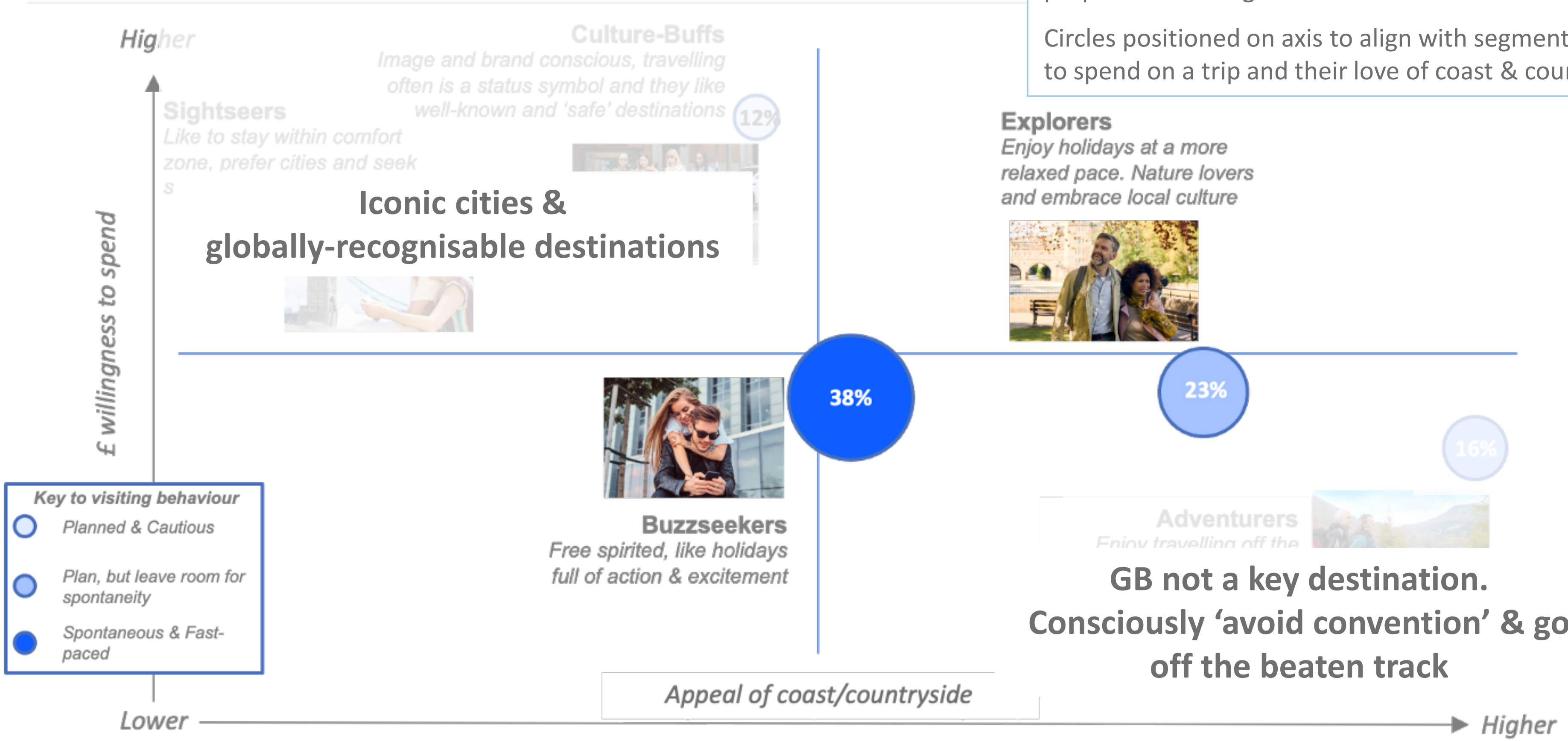
Looking at visitors' attraction to coast and countryside and willingness to invest in their visit gives understanding and insight into their likely 'value' to Sussex



Applying a filter of type of destination which appeals reveals Buzzseekers and Explorers as the most promising segments.

Global analysis: Size of circle represents size of segment as a proportion of the global traveller market

Circles positioned on axis to align with segment willingness to spend on a trip and their love of coast & countryside



Explorers and Buzzseekers can be found across all geographic markets and share common holiday-taking characteristics

Global size:

23%

#1 in:

#2 in: * #3 in:

EXPLORERS

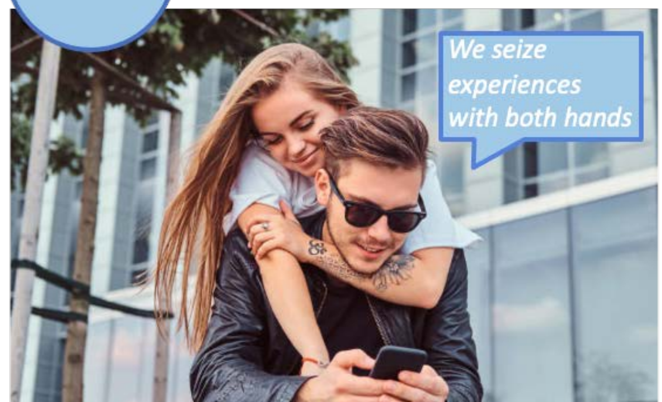
- Know what they like & don't worry about how they're seen
- Go with the flow; a holiday is about not taking too much on
- Less is more – this is time to relax and get away from the stress of busy lives
- Love nature & scenery – both coastal and rural which offer the type of relaxed pace they enjoy
- Love to book most things ahead of their trip, using booking sites, but also have the strongest desire of all segments to go through agents

Global size:

38%

#1 in:

#2 in:



BUZZSEEKERS

- Free-spirited and spontaneous
- Live in the moment & make the most of their time
- MORE is best! Always searching for new ideas, looking to meet new people and engage in new experiences
- Want to pack as much as they possibly can so they don't miss out
- Very social – want to showcase their experiences to others, but also enjoying influencing others around them

There is a good fit between what Explorers and Buzzseekers look for in travel activities and core aspects of the Sussex offer

We relax & savour the moment

Explorers

- Experiencing coastal life, scenery and beaches
- Local food & drink
- Experiencing rural life & scenery
- Enjoying history & heritage
- Experiencing coastal & rural life and scenery

Sussex

Food & Drink
Arts, Culture, Heritage
Events & Activities
Landscape – coast & countryside
Towns & Villages
Brighton

We seize experiences with both hands

Buzzseekers

- Trying local food & drink specialties
- Experiencing coastal life & beaches
- Visiting famous places/iconic sites
- Trying gourmet/world class food
- Outdoor pursuits
- Challenge or action-filled activities
- Hands-on learning activities

Explorers are the recommended lead prospect because of the fit with the Sussex offer. Buzzseekers are an important secondary audience.

Size of segment in market:

Embrace the art of Sussex living:
- Outdoors
- Local F&D, Culture
- Relaxed pace

Explorers
Enjoy a more relaxed pace. Nature lovers & embrace local culture

#1 in: DE 38%, NL 34%
#2 in: AU 26%, CA 23%, FR 22%
#3 in: US 20%

- An action-packed outdoor life
- Local and 'premium' F&D
- Brighton

Buzzseekers
Free spirited, like holidays full of action & excitement

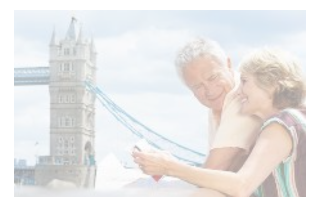
#1 in: US 36%, AU 30%, CA 24%, FR 35%
#2 in: DE 22%, NL 23%

'London plus' opportunity for Brighton. Culture-Buffs a future target for appropriate high-end product

Culture-Buffs
Image & brand conscious, like well-known and 'safe' destinations

#1 in: CN 30%, AE 28%

Sightseers
Stay within comfort zone; prefer cities & sensible, planned trips



#2 in: AE 24%

4. PRIORITY MARKETS

Photo by Markus Spiske on Unsplash

4. PRIORITY MARKETS

USA and Germany, with a focus on Explorers as the best fit segment and halo opportunities for Buzzseekers, provide the strongest prospects for international visits to Sussex.

In the short to medium term Explorers from USA and Germany are the most promising for Sussex because:

- Willingness to explore outside London
- Interest in coast and countryside
- Good fit with heritage, culture and local food & drink
- Plan in advance so relatively easy to inspire with ideas and influence purchase
- Purchase through travel trade so relatively easy to reach

The Explorer visitor type has a better overall fit with Sussex but as Buzzseekers are interested in similar types of experiences there is the opportunity to reach them with the promotional activity and messaging targeting Explorers.

The next few pages goes into detail for each of USA and Germany looking at the two visitor types, their attitudes, perceptions, how they travel, where they go etc to inform marketing communications and product development.

Transport links should inform the priority cities or regions within USA and Germany to target; particularly those with air routes to Gatwick.

Photo by Kai Bossom on Unsplash

USA is the highest value and volume inbound market for Britain

US

Britain's #1 global mkt by value & volume

2019 visits (000s): 4,499
Avg. annual growth, 2003-19: +2%
2019 spend (£m): £4,184
Avg. annual growth, 2003-19: +4%

72% US travellers are repeat GB visitors. Around half of all visits are for a holiday with Q2/Q3 as peak. Strong Post-Covid confidence: 80% of US visitors considering an int'l leisure trip in next 12m (Feb '22)

GB

Perceptions of Britain in USA

GB perceived as having vibrant cities, contemporary culture, and giving US visitors a strong welcome. Ease of getting around is also a key strength. Americans want a holiday with 'fun & laughter'; GB ranks #1 on this for US visitors. GB landscape less strong on natural beauty vs Italy, France, Austria

The opportunity for Sussex

US visitors represent a high value opportunity. They want to engage with the variety a destination offers and will invest in quality experiences characterise a place. Sussex has that variety.

A narrative that brings together Sussex distinctive assets (i.e. a landscape that delivers quality food and wine, outdoors activities and wellbeing, alongside iconic scenery and built heritage) is likely to resonate. Building Sussex profile and identity with both US travel trade and potential visitors is key.

Best prospect segments – Explorers & Buzzseekers

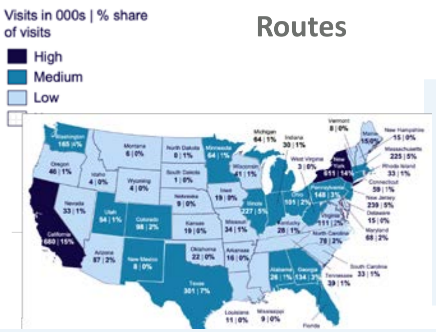
Visitors who want to get under the skin of a destination. Both segments look to experience what's unique about a place. Explorers want to unwind in beautiful and iconic surroundings. Buzzseekers drawn by food & drink and an action-packed itinerary.

	Explorers	Buzzseekers
Segment size	20% (#3)	36% (#1)
Lifestage	45+, 49% 'Empty-nester', 25% wt kids	Skew to 25-34s, but make >20% of age cohorts up to 64 yrs. 33% wt kids
Preferred pace	Relaxed. Want to explore rural life as a couple, or small group	Fast & spontaneous & like to show off. A real interest in knowing a destination
Affluence/Value	££ Good incomes & able to afford luxuries	£££ Good incomes. Sometimes feel need to budget due to US property costs
Travel companions	+1 51%; FAMILY 11%; FRIENDS 21%	+1 34%; FAMILY 28%; FRIENDS 18%
# Trips in L2Y	6.0	4.2
% visited GB in L2Y	11%	19%
GB locations visited	London 43%; Other cities 37%; Rural 17%; Coast 4%	London 41%; Other cities 41%; Rural 24%; Coast 9%
Competitor mkts	Canada, Italy, UK	Canada, Italy, UK
Top 3 appealing activities for an int'l holiday	Iconic places; History & Heritage; Rural life	Local F&D; Iconic places; World-class F&D
Activities with most difference in appeal vs. other segments	Rural life; Parks/Gardens; Outdoor leisure	Challenge/action-filled sports; Hands-on learning; Events

Americans book early and arrange key aspects of their trip in advance

US

Routes



Travel to GB via:

✈ 87% (+8)

⛴: 2% (-11)

🚆: 11% (-1)

Highest % of GB visitors from New York & California. Florida, Texas, Illinois, New Jersey & Massachusetts are also key locations

Gateway airports by % seat capacity include:
NY-JFK (19%), LAX (8%), Orlando (7%), Chicago (6%), NY-Newark (6%), Boston (6%), San Francisco (5%)
GB destination airports by % seat capacity:
Heathrow (75%), Gatwick (14%), Manchester (7%) *Above data: IPS 2015/capacities 2019*

Key USA passenger arrivals to Gatwick:
Tampa (55%), NY-JFK (34%), Orlando (10%)
IPS Mar 2022

Annual airline seat capacity by main carriers:
BA (35%), VAA (19%), American (16%), United (12%) *IPS 2019*

Planning & Booking

Timings
Start to think about trip: >6m = 60% (+15)
Decide on destination: >6m = 37% (+5), 3-6m = 36% (-2)
Book: >6m = 20% (+6), 3-6m = 31% (-1)

Holiday booking methods
💻: 58% (-6)
👥: 24% (-3)
☎ 17% (+9)
Data for trips where travel & accommodation/ travel booked together

Sources of info
Review sites: 32% (+2)
Search: 31% (-2)
Friends/Family: 31% (-9)

When booking travel & accommodation together online, USA visitors are more likely than other markets to pre-book attractions (57%) and tours (56%)

Major tour operators with GB programme
Collette, Trafalgar, Insight Vacations, Luxury Gold, Intrepid, G Adventures, Contiki
Intrepid/G Adventures/Contiki cater to a Buzzseeker profile in particular

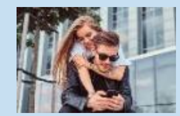
Top online travel companies
Booking.com, Expedia, Google Flights, Kayak, Viator, Get Your Guide

DMCs are active in USA
Angela Shanley Associates Ltd, AxisGlobe, JacTravel, AC, Sovereign Tourism

PR & media opportunities
US visitors are spending more time and attention on social media. Facebook (190m monthly users) & Instagram (112m monthly users) are key. 67% Americans trust reviews from other visitors on socials.

Segment Behaviours

Explorers plan & book early. More reliant on trade.



Buzzseekers more independent. Later booking. Search, online reviews & peers' social media key

Easy access to bookable product online is a key route to US visitors. Video guides an engagement opportunity

(+n) = n% higher than other mkts avg. / (-n) = n% lower than other mkts avg

DE Germany

A large, established market with a desire to explore Britain and its variety of experiences

Britain's #1 European mkt by value & #2 by volume

2019 visits (000s): 3,233
Avg. annual growth, 2003-19: +2%
2019 spend (£m): £1,567
Avg. annual growth, 2003-19: +4%

Frequent travellers, visitors from Germany rank joint #2 in European markets for share of nights in South East of England & have a good seasonal spread too.

GB Perceptions of Britain in Germany

GB perceived as easy to navigate and versatile in the experiences it offers. A compelling combination of outdoors life, heritage and culture, and vibrant regional cities. A recognition GB's food and drink culture is growing in quality and reputation.

The opportunity for Sussex

Sussex has an offer that fits with what visitors from Germany want to experience in GB. This is a good platform for Sussex to build on with its own unique take on experiences available across the county. While individual cities/towns in the county may be known in Germany, there is little sense of where Sussex is; or what it 'means'. There is some scepticism regarding English wine, which currently is more likely to be associated with Kent. Celebrating unique aspects of Sussex's food and wine offer (i.e. independence/sustainability) will support a distinctive and premium positioning. A need to build a meaningful profile and 'brand' recognition.

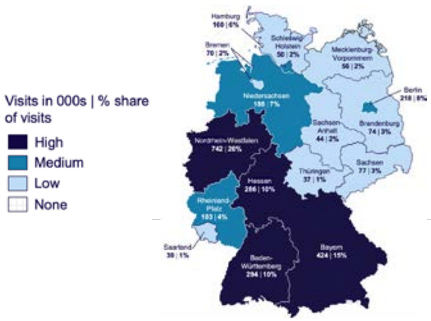
Best prospect segments – Explorers & Buzzseekers

These visitors want to explore the unexpected. Sussex has a lot to offer them. Food & drink a key driver. Explorers love nature, outdoors, and heritage. Buzzseekers are also likely to respond to an action-filled outdoor offer.

	Explorers	Buzzseekers
Segment size	38% (#1)	22% (#2)
Lifestage	45+, 'Empty-nester'	25-44s, 74% 'Pre-nester', 21% wt kids
Preferred pace	Relaxed. Educated & well travelled. Plan ahead to not miss experiences.	Fast & spontaneous. 'Authentic' experiences matter more vs honeypots
Affluence	££ Modest income, but willing to spend. Overseas trips a priority	££ Freedom to spend on holidays
Travel companions	+1 59%; FAMILY 17%; FRIENDS 7%	+1 48%; FAMILY 13%; FRIENDS 19%
# Trips in L2Y	8.4	10.1
% visited GB in L2Y	10%	19%
GB locations visited	London 58%; Other cities 21%; Rural 26%; Coast 25%	London 56%; Other cities 47%; Rural 32%; Coast 29%
Competitor mkts	Spain, Italy, Netherlands, France, Sweden, UK	Spain, Italy, Netherlands, France, UK
Top 3 appealing activities for an int'l holiday	Local F&D; History & Heritage; Iconic places	Local F&D; Iconic places; City life
Activities with most difference in appeal vs. other segments	Rural life; Parks/Gardens	Challenge/action-filled sports; Hands-on learning

Trips are planned early in Germany. Face to face booking and travel trade is popular

Routes



Travel to GB via:

✈ 78%

: 17%

: 5%

Highest % of GB visitors are from South & West of Germany

Gateway airports by % seat capacity include:
Frankfurt (23%), Munich (18%), Düsseldorf (14%), Cologne/Bonn (6%), Berlin (19%)

GB destination airports by % seat capacity:
Heathrow (41%), Stansted (14%), Gatwick (7%) *Above data: IPS 2015/capacities 2019*

Key German passenger arrivals to Gatwick:
Berlin (47%) & Munich (33%) *IPS Mar 2022*

Annual airline seat capacity by main carriers:
Lufthansa (26%), BA (23%), Ryanair (17%), EasyJet (16%)
IPS 2019

Planning & Booking

Timings
Start to think about trip: >6m = 57% (+8)
Decide on destination: >6m = 38% (+6), 3-6m = 40% (+2)
Book: >6m = 15% (+1), 3-6m = 44% (+8)

Holiday booking methods
: 58% (-6)
: 36% (+9)
☎ 5% (-3)

Sources of info
Friends/Family: 51% (+11)
Search: 36% (+9)
Comparison sites: 5% (-3)

Travel trade % share of bookings revenue
Tour Operators/Agents: 51%
Direct service providers (online/offline): 37%
Online portals (e.g. hotel/accom sites): 12%

Major tour operators with GB programme

DERTOUR (Owned by DER Touristik), Wolters Reisen (Owned by TUI Deutschland), Studiosus

Top 3 online travel companies

Booking.com, CHECK24, Expedia.de

DMCs are active in Germany

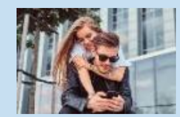
asa Angela Shanley Associates Ltd., JacTravel (A WebBeds specialist brand.)

PR & media opportunities
Radio reaches 76% of Germans each day. Print news still strong, reaching 60% of ppl daily. Major titles feature weekly travel sections.

DE
Germany

Segment Behaviours

Explorers plan & book early. More reliant on trade. Word of mouth key, PR too



Buzzseekers more independent. Later booking. Search, online reviews & peers' social media key

Just over half of German adults own a credit card. More than 50% of digital transactions still paid by bank transfer

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5. PROPOSITION, POSITIONING & MESSAGING

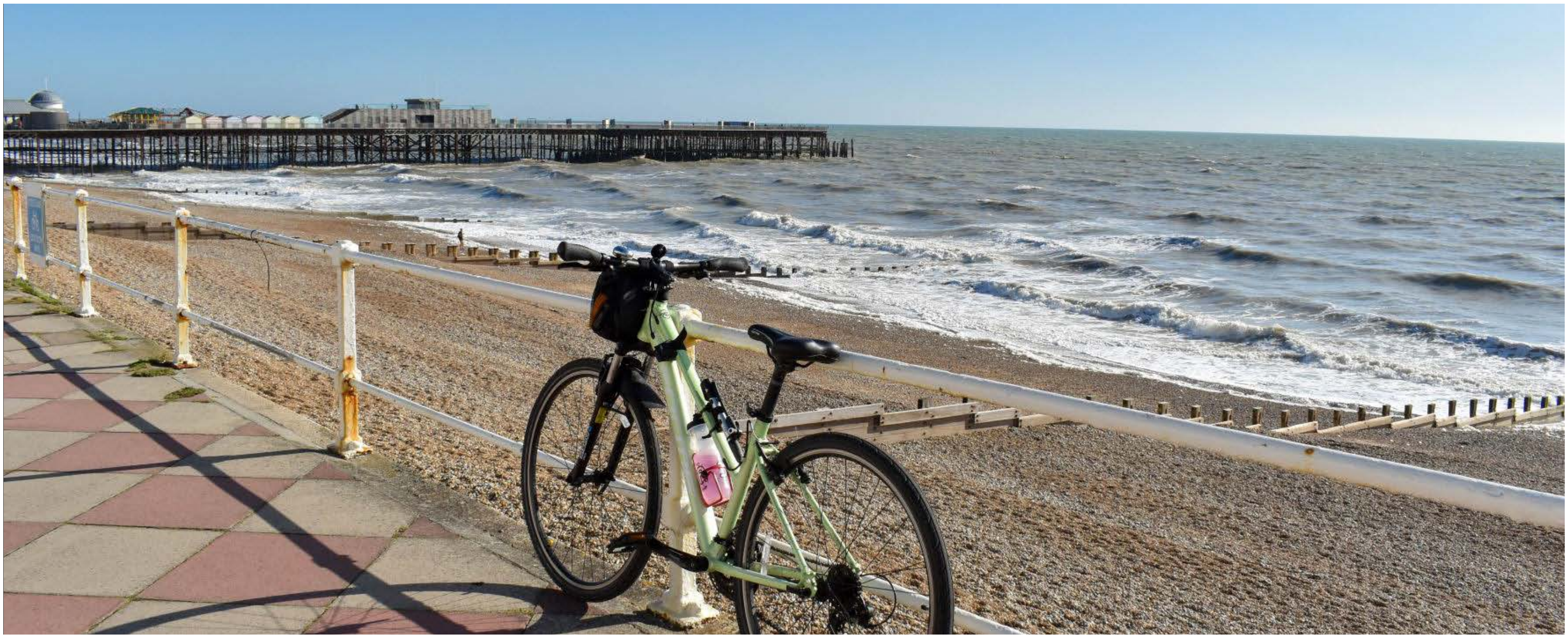


Photo by Kai Bossom on Unsplash

5. PROPOSITION, POSITIONING & MESSAGING

The 2021 Vision & Action Plan suggested a strong proposition could be built around Sussex's culturally and gastronomically rich heritage, and the way that life appears to revolve around the arts and the pursuit of good living. This current work validates and endorses that conclusion.

The high-quality food, wine and cultural experiences that Sussex has to offer, in its essentially English landscapes, towns, villages and gardens, seamlessly combine traditional and contemporary. Positioning Sussex as ***A place where living well is easy*** promotes a clear, simple proposition to visitors.

The table here shows the key messages for both Explorers and Buzzseekers.
These messages are mainly an appeal to the emotions, but also locate Sussex geographically, especially with reference to London, and reassure on access. Sustainability is a message that should be woven throughout.

Explorers – key messages

- A unique, curated collection of exceptional experiences
- All that's good about England
- A feast for (all) the senses
- A place of unexpected pleasures
- A place to savour
- Sustainable experiences
- Sussex –South East England – easy access to/from London, international airport and ferry ports

Buzzseekers – key messages

- As above plus…
- Immerse yourself in the good life
- Brighton – cool city by the sea

6. PRODUCT & EXPERIENCE DEVELOPMENT

Photo by Robert Matthews on Unsplash

6. PRODUCT & EXPERIENCE DEVELOPMENT

Sussex already has the right assets to take to market – the challenge will be breaking through to the visitor and to intermediaries.

Although building awareness and interest has to be achieved through effective marketing this will be aided through presenting the experiences in different ways as itineraries to inspire or packages of bookable product. For example:

- **Geographically** – from London, from Gatwick, from ferry ports, coast and/or countryside, by car or by train
- **Thematically** – leading with vineyards or food or gardens or heritage and tying in other experiences
- **Events Plus** – starting with events and building a 3/4/5 day stay around it
- **Destination Hotel Plus** – start with one of the best hotels as a base and build an itinerary from there

New trade packages might include:

For Explorers from the US:

- Behind the scenes, unique experiences such as "Meet the Duke, family, curator, producer, owner…"
- Personal guides, private/luxury vehicle tours

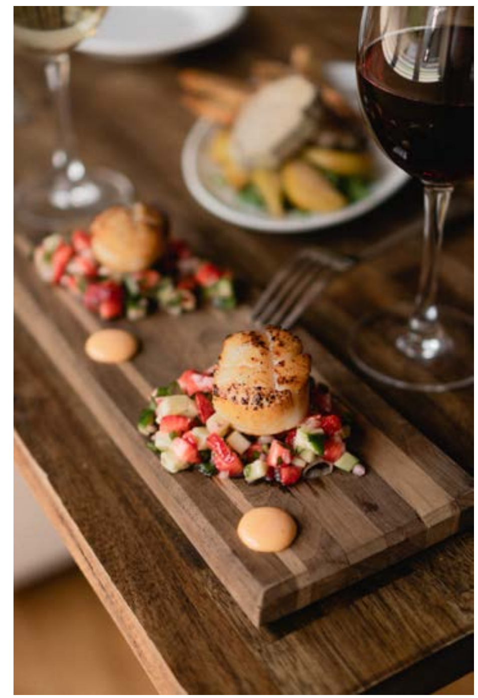
For Buzzseekers

- Experiences which involve doing, making, learning – cookery schools, breweries, vineyards

These products, packages and itineraries could also be offered as part of the social programmes for corporate events and meetings, and as incentive packages.

More 'interesting' and unusual accommodation on country estates, heritage buildings and glamping would have appeal. Estates including Goodwood, Firle and Cowdray have guest accommodation but there could be opportunities for new and different types of accommodation on these and others.

Partnership with Kent in building the profile of the South East for English wine, viticulture and associated gastronomy/food culture would help resources go further and extend reach.



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7. CONCLUSION

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7. CONCLUSION

Sussex has a range of outstanding quality experiences capable of attracting international visitors.

It can be a challenge to persuade international visitors to travel more widely in the UK, however the proximity of Sussex to London and the quality of its premium experiences provide a compelling offer if well-packaged and communicated.

It makes sense to focus resources tightly to make an impact rather than spread widely across markets and visitor types. The analysis undertaken in this project identifies the Explorer segment in Germany and the USA as having greatest growth potential over the short to medium term – and beyond.

These prospective visitors are searching for an exciting holiday exploring the unexpected – the unique experiences that 'make' a county whether they are historic or contemporary, rural or urban.

Sussex can deliver those memorable, enchanting and unexpected experiences which Explorers and Buzzseekers are searching for.

To convert potential visits to actual visits will require Sussex's tourism players to work together around the '*living well'* proposition with clear and consistent messaging. And where appropriate to work in partnership with neighbouring areas, Kent in particular, to broaden and enrich the offer.

Innovative and creative product development will be needed for itineraries and packages, with ideas and inspiration drawing on the seven categories of experience identified in this project. These specially selected experiences can be distributed online, through the travel trade, via PR, and through VisitBritain channels.

Photo by Stephanie McCabe on Unsplash

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