

Living Britain

How Britain's towns and cities are undergoing cultural revival



An independent report
by The Future Laboratory
commissioned by Zurich



Introduction
Business
Culture
Media
Community
Travel

Britons are rediscovering the British Isles as a holiday destination; Lincolnshire has a largely forgotten coastline, which is beginning to be rediscovered

Travel

UK consumers are revitalising the stay-at-home holiday market and driving some key travel trends, including Homeland Holidays, Cultraventuring, W(h)ealthcare travel, and Voluntourism. Fears about global warming and the environmental impacts of air travel, along with increasing airport security queues, are some of the main reasons cited for these changes. But there is more to it than that. Brits are re-discovering a landscape that has undergone a unique design, cultural, and architectural renaissance.

DRIVERS

HOLIDAY NATION

Britons are taking more holidays than ever before, with time off for breaks and holidays valued almost as much as income.

Forward-thinking businesses recognise the benefits of having a workforce that feels valued, and are allowing employees flexible work hours. Ernst & Young is testing a scheme whereby employees can choose their own annual holiday quotas and can have greater flexibility through homeworking and nine-day working 'fortnights'.

Richard Cope, senior travel analyst at Mintel, says: 'The mid-high social economic groups are going on holiday much more often and they want a working life that will accommodate these frequent breaks.'

The fact that Britons are travelling more than ever has raised the bar in terms of what constitutes a desirable, kudos-giving holiday. Cope says: 'It used to be enough to go anywhere long-haul. Now, especially with the advent of photo-sharing sites like Flickr, Britons are in friendly competition with each other to have increasingly daring, unusual, exclusive, authentic and considered holidays.' They are also visiting towns and cities that have used art, culture and architecture to revitalise their image, such as Littlehampton, where clever planning has re-invented the beach front café (see case study on following page).

HIT THE ROAD

In tandem with their growing appetite for travel, Britons are also rediscovering their love of the open road and are keen to spend weekends and holiday time visiting friends and family and new places. According to The Society of Motor Manufacturers and Traders (SMMT), in 2005 there were 34.6m cars and CVs (commercial vehicles) in use¹ in the UK, a massive figure considering Britain has a total population of approximately 57m.

Research by motor insurance company Zurich discovered that more than 9.2m Brits will take to the road for holidays in 2007. The reasons for this are varied, with 52% citing convenience, 32% overall cost, 14% environment, 16% delays and 10% airport security checks. The research found distance was no object, with 24% prepared to drive more than 750 miles to get to their destination and 20% happy to spend 15 hours or more getting there.²

Renting cars for the day or weekend has become much more competitively priced and budget travel within the UK has been made possible through companies such as The Big Yellow Bus (single tickets start at £1), or the more luxurious Classic Car Club, where a Daimler, MG, or open-top Rolls Royce can transport drivers back to the grand old days of road travel.

The Thomas Heatherwick-designed East Beach Café in Littlehampton is a prime example of local seaside regeneration



Case Study East Beach Café

The East Beach Café in Littlehampton is a classic example of how British seaside towns and coastlines are being regenerated into cultural hotspots with both traditional and new attractions.

Housed in a stunning building designed by British architect Thomas Heatherwick to evoke the feeling of a stray piece of driftwood, the bistro-style café replaced a chips and burger kiosk that had long been the sole sustenance provider along the beach.

The café was founded by mother and daughter duo Jane and Sophie Wood, who were propelled into action after the local council granted planning permission to a 100-seat burger bar in a new building of no architectural merit, despite receiving 400 objections from locals. The family decided to buy the site from the burger franchise and work with locals to conceive something Jane Wood describes as 'beautiful and useful for Littlehampton's seafront'.

The thinking behind the café structure was to create something that bridged the gap between art and sculpture, and that people would visit as much to view it as to dine inside it. Wood says in the first weeks of opening 'excited' tourists from Switzerland, Japan, France and America made purpose trips to Littlehampton to visit the café.

The cuisine of the café is a gourmet take on classic seaside town fair (fish and chips) and a bistro-style fish restaurant. Wood thinks the combination of healthy, good quality food along with the appeal of the café's design is encouraging day trippers and one-night stayers from cities and towns across the UK who are 'rediscovering the magic and appeal of the British seaside'.

RELIEVE THE PRESSURE

Stress and lifestyle-related illnesses are on the rise, a fact that in itself is encouraging a new kind of 'wellness traveller' in the UK. A survey on 'Self-reported Work-related Illness' conducted by the Health & Safety Executive (HSE) indicates that: 'Around 420,000 individuals in Britain believed in 2005/06 they were experiencing work-related stress at a level that was making them ill.' Another survey, 'Psychosocial Working Conditions', conducted by the HSE indicated that around 'one in six of all working individuals thought their job was very or extremely stressful.'³

Britons are suffering from poor heart health as well. The British Heart Foundation states: 'In the UK, around 227,000 people suffer a heart attack each year, and someone has a heart attack every two minutes.' Considering the above stats, it is of little surprise that a Mintel research document, 'What People Generally Want From A Holiday', revealed that 60% of all holidaymakers aged 16plus thought 'total relaxation' made a good holiday.⁴ More interestingly, as we shall see in our trend sections, regional tourism organisations are responding to these shifting needs by declaring regions of Britain 'peace and tranquillity' areas.

HEALTH MANAGEMENT

For a variety of reasons, Britons are losing faith in the NHS. In Europ Assistance's latest survey addressing European health habits, needs and concerns, UK citizens showed 'the most anxiety over growing healthcare trends and condemn state care for the elderly...only 56% of Britons have a positive opinion of the UK healthcare system.'⁵

Because of this, Britons are seeking help from outside practitioners, taking up a range of alternative treatments, and taking out private healthcare policies at an unprecedented rate. According to a news story published by privatehealth.co.uk, in Britain today more than 6.5m people have private medical insurance, 6m have cash plans, 8m pay out-of-pocket for a range

of complementary therapies, and 250,000 self-fund each year for private surgery.⁶

The above claim is backed up by stats from Mintel reports on 'Gastro-Intestinal Remedies' and 'Complementary Medicines'. The research found that over the last five years the market for GI remedies has seen a 26% growth, with sales set to hit £245m (\$495m, €350m) this year.⁷ Expenditure on complementary medicines in 2007 is predicted to hit £191m (\$382m, €272m), a 32% increase in sales since 2002 with Mintel predicting sales will break the £250m (\$500m, €356m) mark by 2011. Almost half (49%) of British women and almost three in ten (28%) of men have used complementary medicine and would consider using it again.⁸

In the same way that Britons are taking control of their health through complementary products and treatments, they are also switching the focus of holidays from indulgence to rejuvenation and health maintenance as part of a more strategic plan to stay healthy.

EXPERIENCE ECONOMY

Britons are no longer happy to consume but want to 'do', 'experience' and 'participate' and are prepared to dedicate a large chunk of spare income to this. The 'experience day' economy is booming, with Mintel reporting that Britons took 1m experience days in 2006 compared to 548,000 in 2001 (84% growth).⁹

CLIMATE CHANGE

Climate change is an issue that can no longer be ignored and millions of Britons are taking action to reduce their carbon footprint. Although still largely voluntary, a recent report by the Center for Resource Solutions indicates travellers are willing to spend more money to make their holiday less harmful for the environment, and carbon offsetting certificate sales exceeded 1.9m megawatt-hours in 2002, doubled from the previous year.¹⁰

New artworks and architecture are playing a major part in British seaside rejuvenation. Bathing Beauties, an exhibition of seaside art and architecture along a stretch of the Lincolnshire coast does just that



A Travel Watch article written by Jonathan Tourtellot and Nandita Khanna of National Geographic states: 'Air travel is expected to double in 15 years and already accounts for 3.5% of human-generated greenhouse gas.' Tourism Concerns figures are even more dramatic: the organisation says that scientists predict 'by 2015 half of the annual destruction of the ozone layer will be caused by air travel.'¹¹

Britons realise the best way to reduce their carbon emissions is to fly less. With this in mind, the number of people travelling abroad by train and boat is soaring. In November 2007, Eurostar will open a new, higher capacity terminal at Kings Cross, London.

RETURNMENT VERSUS RETIREMENT

Britons are living longer than ever before (average life expectancy for men is 74 years, for women 79) and people are hitting retirement age with the view that they have more to offer. This development has fuelled the growth of retirement careers with over-60s setting up new businesses or becoming consultants. A survey by the Employer's Forum on Age, a body campaigning on age issues in the workplace, found that '93% of over-60s like work, the highest percentage of any age group.'¹²

REVIVE, REGENERATE, RESUSCITATE

Tremendous efforts have been made to revitalise and regenerate tourism in the countryside and on the coast, a fact that is driving a new generation of 30somethings to visit the towns and places more familiar to their parents and grandparents. In August 2007, culture secretary James Purnell announced a £1m cash boost to support rural tourism in Britain via a donation to national tourism agency Visit Britain. Of the donation, James Purnell said: 'This cash injection...will help promote England's many great destinations. I want to remind people across the country of the wealth and world class cultural and leisure opportunities on our doorsteps. You don't need to go far to have a great day out.'¹³

Britain's coastlines are in the process of undergoing major regenerative works. The EU ploughed money into improving Swansea Bay and as a result, Mumbles, the biggest village on the Gower peninsula, was cited by The Guardian newspaper as one of the best seaside towns in Britain.¹⁴

AUTHENTIC IS THE WORD

Across the entire tourism industry travellers are increasingly looking for 'authenticity' and for ways of ensuring their holidays benefit and respect local communities. Even the National Trust has pinpointed this shift with holidays that allow you to work while you play on a number of conservation projects across the UK. In The Future Laboratory's Consumer Attitudes Audit™ autumn 2007, 89% of respondents suggested 'respect' and 79% 'honesty' as qualities people should exhibit more¹⁵, and this is reflected in Britons' changing approach to travel.

Justin Francis, co-founder of Responsibletravel.com says: 'Tourists want the local guide born and bred in that place rather than an English/US guide. They want to stay in a small, beautiful lodge built from local wood by local craftsmen in a traditional design. And they want to eat fresh, local cuisine from local producers rather than English-style fare flown in from the other side of the world.'

The old 'gold taps and marble floors' notions of luxury travel and hospitality no longer satisfy the demands of the contemporary luxury traveller. Glen Donovan of members-only specialist travel agent Earth says: 'We disregard 80% of what is conventionally described as luxury. Our holidays focus on an experience but in a way that's authentic, creative and experiential. We view an empty beach, a freshly cooked fish and an uninterrupted bottle of wine with the person you love as luxury.'

TRENDS

HOMELAND HOLIDAYS

After a frenzied love affair with cheap foreign travel, Britons are rediscovering the British Isles as a holiday destination. The stress of air travel, a desire to reduce carbon footprints, and a resurgence of national pride in Britain's spectacular countryside, cities and coastline are major contributing factors. The idea of begrudgingly spending the same amount of money to travel within your home country as you would travelling abroad is waning as Britons place a higher value on their overall holiday experience. In 2005 British consumers took 40.7m domestic holidays and domestic expenditure reached £9.5bn (\$18bn, €13.5bn) with average spend per trip increasing by 29% since 2000.¹⁶

Small hotels and B&Bs have re-established themselves as quirky, individual staples of British Isles holidaying, and Britons are increasingly wanting to stay in them. The United Kingdom Tourism Survey found in February 2007 that there were 7.6m overnight trips made in the UK by UK residents, an increase of 3% from the same month in 2006, and that total spend on UK trips in February 2007 had gone up 18% compared with February 2006.¹⁷

Inspired by festival camping experiences and a desire to take more environmentally friendly holidays, more Britons are camping than ever before. Discount camping ranges from big retailers like Tesco and Asda have brought prices down to below £9 and Argos offers a two-man camping kit containing tent, two rolling mats, two sleeping bags and two rucksacks for £25. The first print run of The Cool Camping Guide, written by Jonathan Knight, sold out in England; such was its popularity that in April 2007 the same group published Cool Camping: Scotland and Cool Camping: Wales. The next trend we predict is for vintage vacations, where campers and holiday-makers can stay in retro resorts.

Case Study National Trust Working Holidays

For 40 years The National Trust has run voluntourism 'working holidays' across Britain. Initially it offered 200 breaks, but over the years this has risen to 450. The breaks incorporate a range of conservation and restorative work ranging from woodland management to goat herding, lighthouse painting, tree planting, conservation surveys and castle management.

No experience is required to go on the 2-7 day breaks that cost a reasonable £60-£85, including food and hostel-type accommodation.

According to Jenni Clegg, national manager of the scheme, the breaks were conceived to get 16-25-year-olds involved in the work of the National Trust.

'The demographic has now expanded to include the Stannah Stairlift generation, and overworked middle-aged professionals and 20somethings thinking about starting a career in conservation,' says Clegg.

Unsurprisingly, Clegg says the holidays tend to attract people that have indoor, office jobs such as teachers, accountants, bankers and lawyers.

'They want to do something totally different with their holiday time, get into the outdoors and feel like they've achieved something or learnt a new skill at the end of it.'

Urbanites are trying their hand at camping, albeit with a more design-orientated edge. Cath Kidston's range includes floral print tents and star-pattern sleeping bags, while Millets has released a genius 'Paint Your Own' tent. Designer Orla Kiely has brought out a retro-print dome tent and a variety of designers have brought out instantly erectable 'pop-up' tents.

Boutique Camping, run by Mark and Emma Sutton, services the new generation of campers who want the experience without the hassle of setting up or the discomfort of a standard tent. The company provides 'luxury' and 'boutique camping' experiences at a range of camp sites and festivals including Bestival, The Big Chill, Electric Picnic, Hay Festival, Latitude, The Port Eliot LitFest and Womad. The range includes tipis, buses, beach huts, pod pads and bohemian marquees. Prices vary per festival but start at around £200 (\$400, €285) and go all the way to £920 (\$1,840, €1,310) for an 8-12 man tipi.

Seaside towns are also reclaiming their place as the jewels in the British Isles' holidaying crown, with new artworks and architecture playing a major role in the regeneration of the British coastline. In Aldeburgh a sculpture of interlocking scallop shells by Maggie Hambling commemorates composer Benjamin Britten, and in Morecambe, Lancashire, The Tern Project is a collection of art works situated over the town's five-mile seafront. In Littlehampton, the beach café is designed by cutting edge British creative Thomas Heatherwick, who is interviewed in our business trends section.

Away from the coastlines, sculpture is enhancing the travelling experience. A trio of new works has just been commissioned to mark entry points into Wales. Holyhead Harbour will house three monumental standing stones (40-metre, 60-metre and 80-metre) with baby menhirs at their base. A sculpture entitled The Postcard will add a dash of beauty to the A550 and at a second crossing of the Severn a Marks Barfield work entitled The Red Cloud will see a cluster of figures dancing on poles.





Curator of Bathing Beauties, Michael Trainor, sees the exhibition as a 'linear gallery of new seaside architecture'

Case Study

Michael Trainor, curator of Bathing Beauties, Mablethorpe, Lincolnshire

The idea behind Bathing Beauties was to create 'a linear gallery of new seaside architecture'. Essentially a design contest, entrants from around the world submitted revolutionary takes on the classic beach hut, with the winners being selected to erect their structures along a seven-mile stretch of Lincolnshire coastline.

Curator Michael Trainor says: 'Lincolnshire has a largely unloved, forgotten coastline. The contest was created to bring new people to the area while celebrating one of Britain's most beautiful architectural features, that to my notion hadn't really been looked at in 300 years, and re-imagine them for the 21st century.'

There are more than 750,000 beach huts in Britain. Although the majority are privately owned, you can rent them for as little as £10 a day. Britons have been rediscovering their love of beach huts with local councils inundated with daily rental requests and purchase prices on fashionable coastlines going up to tens of thousands of pounds.

After construction, the huts will be available to rent for the day from East Linsey District Council and a hut-viewing route will give the coastline its first 'art attraction'. The huts will be constructed over two phases, the first in September 2007 and the second in February 2008, with the designs taking on the form of everything from pointed wicker baskets to futuristic living pods and quirky 'canoodling' and viewing pods.

In addition to the huts, Trainor is creating a Bird High and a Cloud Viewing platform, with cloud menus and seats angled to allow uninterrupted skyline viewing.

'Lincolnshire is known for its big skies, so why not take advantage of that with some new beach architecture? I'm hoping to do more coastline architecture art projects, all different of course, but I'd like to stick to Britain's forgotten gems.'

Spending time in the great outdoors is becoming an increasingly important holiday motivation. Center Parcs is ploughing £60m (\$120m, €85m) into upgrading more than 1,000 of its lodges to be more inspired by, and in tune with, the British countryside. Tara Bernerd, founder of interior design firm Target Living led the project.

Tuddenham Mill, Suffolk is a luxury hotel situated in a 12-acre rural setting that combines bucolic charm with cosmopolitan service. The hotel's website invites guests to 'discover rustic chic' and offers an appealing promise of 'big skies and cool interiors. Tranquil water and seductive aromas. From its exposed beams and water wheel to the contemporary elegance of the bedroom furnishings, Tuddenham Mill brings together a unique mix of influences to excite the senses.'

Britons are also relishing the opportunity to be Lords and Ladies of the Manor for a few days by staying in new, contemporary interpretations of the country house hotel. A Future Laboratory survey on Nu-Wealth found there are about 4m 'new mass affluent' (people with an annual income over £70,000) in the UK.¹⁸ People that fall into this category are more likely to flash the cash on 'special' dinners, weekends away and experiences, with the survey finding that 25% of mass affluents in the 18-25 age bracket are willing to spend in excess of £3,000 (\$6,000, €4,200) for a luxury weekend away.

Cowley Manor in Gloucestershire is a popular destination for socialites and WAGs, as it offers metropolitan style and services with an eccentric take on traditional country house interior design. The Endsleigh near Tavistock, Devon offers a more traditionally Arcadian style of city escape. Founded by Olga Polizzi in 2005 (daughter of Lord Forte of Trust House Forte hotels) but now managed by her daughter Alex Polizzi, the hotel offers guests the chance to take part in country pursuits but without the kind of 'pomp and ceremony' synonymous with traditional country house hotels. At the Endsleigh, set meal times and dining areas have been scrapped to allow guests a greater sense of freedom, comfort and relaxation and to enhance the feeling that the house is their 'home'.



In an attempt to avoid the stress of air travel, people are increasingly looking to the British countryside, waterways and cities for their holidays

Case Study Heartwood Narrowboats

'The type of people buying long boats to live on and for holidays has changed a lot over the last five years,' says Paul Heartwood of Heartwood narrowboats. 'As little as 10 years ago people used to regard people living in narrowboats as sub-humans, but with the housing market gone the way it has, all sorts of people – young single professionals, artists, middle age couples, retired couples – are buying boats.'

Britons are escaping to the canal for a peaceful, more affordable holiday and lifestyle choice. The regeneration of inner city wharfs, docklands and canal sides have re-introduced urbanites to the pleasures of water living. There are thought to be around 16,000 people in Britain living on narrowboats and hundreds of thousands who rent them for pleasure cruising.

Paul Heartwood says his new customer base is looking for a different lease of life, to escape the rat-race or they simply can't afford a place on land so have gone for a marine mortgage instead.

As the people purchasing narrowboats has changed, so have the vessels. Heartwood Narrowboats offers a totally bespoke design service with interiors designed to house plasma TVs, wireless internet, LED lighting, telephones and computers.

'People want to make a lifestyle change without sacrificing home comforts, and there's no reason why they should have to,' says Paul.

Alex Polizzi comments: 'Our ethos is to treat our guests as we would like to be looked after ourselves. We like our guests to completely relax; reading a book curled up on a sofa, for example, eating wherever they feel like it, and having a drink brought to them instead of having a mini bar.'

Renting properties with family and friends is becoming another popular way of spending a holiday or marking a special occasion. The Landmark Trust specialises in renting unusual property (castles, water towers, monasteries) to groups ranging in size from 1-16. Over the last five years, director Peter Pearce says there has been a marked increase in demand and that the demographic of their clientele has evolved to include young families, empty nesters, retired couples, groups of 20somethings and singles.

Pearce believes Landmark Properties appeal to Britons seeking 'distinctiveness and quality' and many of their clients describe it as 'a sort of club they would only tell their best friends about'.

CONSCIENCE TOURISM

After decades of holidays being all about 'self', Britons are considering the impact their travel habits have on local communities and the environment and are enthused by the notion that holidays from caravans to trips on Britain's canals and inland waterways can be 'responsible'. Research by Mintel found that the UK's green travellers are a rapidly expanding, although still relatively niche, market. In 2006 there were more than 1m 'responsible holidays' taken by the British, worth £409m (\$818m, €583m). Based on 25% growth year-on-year, it is predicted that by 2011 eco-tourism will account for 3.4% of the total travel market.¹⁹

Such is the demand for the 'eco-experience', a number of long established hotels, resorts and boutique hotels are in the process of converting into 'green' hotels. Gordon Campbell Gray is currently working with the Earl Of March on



An estimated 16,000 people live on narrowboats in Britain. Paul Heartwood, of Heartwood Narrowboats based in Stoke On Trent, makes bespoke narrowboats for an increasingly varied consumer base



The East Beach Café in Littlehampton has proved to be a popular seaside destination for tourists around the UK

turning The Goodwood Park Hotel in West Sussex into a luxury eco-hotel. At the Stratton boutique hotel in Norfolk the garden has been planted with indigenous plants to encourage insects and wildlife.

Justin Francis of Britain's leading responsible tourism operator Responsibletravel.com says: 'British tourism used to be about being fanned and dusted in a beautiful hotel or lying by a pool. Now it's more experiential and participatory. Baby boomers want to feel they are making a difference. They want to learn about an area's history and add value to areas they visit.'

British luxury jet company Silverjet is the first flight operator to put a mandatory carbon offsetting fee into ticket prices. 'The aim was to provide the ultimate in luxury while being an environmentally friendly operation,' says George Henderson, the company's IT director and carbon neutral champion. 'Also, our aircrafts glide in rather than use engine power, we have as little weight on board as possible, we switch the engines off when the craft is taxiing and we're in talks with Boeing about more energy-efficient wing and engine technology.' Since launching in 2005, the company has enjoyed such success it plans to expand from one to three aircraft by the end of 2007.

Britons are also becoming avid 'voluntourists', a type of holiday that allows travellers to 'give back' while learning a new skill, enjoying the great outdoors or experiencing a culture from a more grassroots perspective. Jingando Holidays, founded by Teresa Keohane and Kate Nowakowski, specialises in trips to Brazil from the UK that combine Brazilian dance classes and voluntary work in local favelas doing painting and other regenerative work. The duo founded the company so British tourists could experience the 'real Brazil', while learning a new skill and putting something back into the country.

Many of the voluntourism breaks that take place on British soil tackle conservation and restoration

work and are considerably cheaper to participate in than foreign voluntourism. The National Trust runs 'working holidays' where volunteers take part in a range of tasks such as drystone walling, hayraking and woodland clearing.

CULTRAVENTURING, OR CULTURE TOURISM

Britons are increasingly being motivated to travel through a desire to engage in and consume culture with companies such as Altyer holidays (see case study on following page). Mintel research on what people want from a holiday discovered that 51% of holidaymakers aged 16plus thought 'exploring towns and cities' was important to making a good holiday, with 59% naming 'enjoying local food and drink' and 42% 'visiting cultural sites and venues'. The same report found that between 2002 and 2006 the number of people citing 'feeling like I've experienced a new culture' as essential to having a good holiday rose from 28% to 34%.²⁰

City tourism websites are pushing themed itineraries. Ken Kelling, communications director of Visit London, says: 'People are prepared to visit new cities for a specific reason and want to feel like they're visiting the right show, the right spa, the right shopping area or whatever their motivation for coming may be.'

To fulfil this need, the Visit London website has a popular People Like You section with categories including Green, Luxury, Budget, Kids and Gay. The Visit Cardiff website has a similar feature with suggested itineraries such as Shop & City, Food Lovers, Dragon & Daffodil, Roman & Norman, Family Fun, Sporting & Spectator and Indulge & Spoil. Seeglasgow.com is a cutting-edge take on city tourism websites, bearing the strapline 'Scotland with style'. According to the See Glasgow press office, since the re-branding exercise launched in March 2004, 360,000 additional tourists have visited the city, equating to £41.7m (\$83m, €59.5m) in economic benefit.²¹

Case Study Altyerre Holidays

Altyerre is a bespoke experiential holiday company that, according to director Matthew Pegler, is 'not about thrills without the skills'.

'The off-the-peg exhilaration and adrenalin stuff is all fine, but we focus on creating experiences that are consequential rather than fleeting,' he says. 'We give people the opportunity to learn something new in a thorough, in-depth and correct program.'

Pegler launched Altyerre to respond to Britons' growing need to 'self-actualise and shape their individual identities through what they do rather than what they buy'. The events are guided by top industry experts and each itinerary is entirely bespoke, according to the whims, fancies and learning requirements of each participating group.

Suggestions include To The Manor Born (etiquette and modern manors), In Vino Veritas (wine making and vineyard management), Lock, Stock & Barrel (shooting), Cast Of Thousands (fishing), Back To Nature (bushcraft & discovering nature), Thought For Food and The Art Of Seeing (art history & appreciation).

To give an example of how hands-on the experiences are, the participants of Thought For Food are woken at dawn to go to an industry food market with a professional restaurateur where they observe and participate in the food-buying process for a top restaurant. Then they observe the runnings of a professional kitchen and over the course of the weekend take a cookery masterclass, learn about fish smoking, cheese production and cattle management.

Altyerre is seeing an increasing amount of clients from the corporate world wanting to gain basic skills such as shooting and ballroom dancing before attending a hospitality event. Pegler says: 'People in the corporate world can suddenly find themselves in social settings they have no previous experience of. It's OK to be a beginner, but to have no clue at all would make the event hugely daunting.'

Offering experience based holidays, Altyerre Holidays, based in Kent, aims to 'give people the opportunity to learn something new' according to company director Matthew Pegler



Britons have also become a nation of dedicated festival attendees. Over the last five years the number of weekend or week-long festivals dedicated to music, literature, art, dance and comedy has exploded. Despite speculation that the music festival circuit was saturated and ticket sales for summer 2007 would be down due to overload of choice, many festivals – The Big Chill, Bestival, Global Gathering, Glastonbury, Latitude, Festinho – saw record levels of attendees. The popularity of music festivals has spread into the literary world with The Hay and The Port Eliot festival achieving close to capacity attendance levels.

DESIGN TOURISM

Design tourism is on the rise. Visitors are opting for cities not so much for their gastronomy, cathedrals (unless it's the Gaudi Sagrada Familia church in Barcelona) and cheap booze, but the merits of modern architecture, or what Observer writer Sally Watson dubs 'modern masterpieces'. These are the works of architects in cities such as Cardiff (the Opera House), Edinburgh (the parliament buildings), Newcastle/Gateshead (the winking bridge, the Baltic), St Ives (the Tate), and London (the Gherkin, the Millennium Bridge, the Tate Modern).

WELLNESS TRAVEL

Health and wellbeing have permeated the nation's consciousness. People are looking ahead and implementing steps now that will improve their wellbeing in the future. This development means the traditional r&r (rest & relaxation) holiday has changed into a thriving travel sub-genre taking in spas, yoga retreats, ashrams, organic farms, walking holidays and medical treatments that rejuvenate the mind, body and soul.

Mintel research found that in 2006 Britons went on 205,000 health and wellness holidays, 'taking advantage of yoga classes, holistic healing and spa visits in addition to surgical recuperation' and spent an estimated £135m (\$270m, €192m) with sales set to increase by as much as 150% by 2011.²²

The 80s 'health farm' concept has evolved into a thriving detox and retreat industry. Britons are attempting to counteract the excesses of everyday life with a short detox break, and those wanting to

make life-long alterations are using detox breaks as the spring board to a new, more health-conscious lifestyle. Online operators wellbeingescapes.co.uk and hoho.co.uk (Holistic Holidays) are seeing a sharp rise in bookings with interest coming in from a much wider demographic.

Pure Cure is a London-based bespoke detox holiday facilitator that combines 'exercise with nutricology'. Founded by Shevaune Fox, Anja Liebe and Sybille Gebhardt, the company offers, over the course of a week in a farm house in France, bespoke detox plans including a one-to-one consultation with a qualified natural nutritionist, detox resource kit, pre detox health profile, daily yoga, meditation and pranayama and healthy organic food.

'They feel stressed and disconnected from their lives and want to change something,' says Fox. 'Some come because they want to lose weight, others to feel calmer and more in control of their lives.'

After years of flagging behind their Asian and European counterparts, British spas are being recognised for their staff expertise and classic, luxurious settings. St David's Hotel in Cardiff is known for its thalassotherapy water treatment and is the only spa outside of London to offer the Chantecaille flower facial. The Balmoral Spa in Edinburgh offers a range of holistic treatments – reiki, reflexology, ear candling and Brazilian toe therapy – alongside the standard beauty treatments. Since opening in July 2004, The Grove in West Yorkshire has won numerous awards and Whatley Manor in Wiltshire has been recommended in the press as being one of the UK's best spas.

Britons are taking record numbers of cycling holidays, which ties into a desire to take holidays with a low environmental impact and to improve wellbeing. This is a trend we've dubbed w(h)healthcare because people are investing in their health and wellness portfolios rather than waiting until they are ill. According to Mintel research, in 2006 Brits spent £120m (\$240m, €171m) on dedicated cycling holidays with some operators experiencing as much as a 30% increase in bookings on 2005 figures.²³



Participation and experience are becoming increasingly important to the British holidaymaker. Events and activities which allow this, such as Bathing Beauties in Lincolnshire, prove ever-more popular

KNOWLEDGE-VENTURING

Britons are starting to use holidays to gain new skills, insights or test the water for a career change. Holidays on offer range from learning to be a mechanic, growing vines, running a farm, learning a language or perfecting a specific style of cuisine. Immersive holidays where travellers get to observe and participate in a job/activity that would normally be off limits are becoming popular, with people paying substantial sums to work in a restaurant kitchen, shadow a country manor park ranger or be part of the management team of an operational vineyard for a few days. The Future Laboratory's 2007 Consumer Attitudes Audit™ found 12% of Britain's would like to learn more and 8% would like to take time off to engage in an experience that would allow them to develop more fully or discover their spiritual side.²⁴

As less kudos is to be found in what we own and consume, having a wide range of status skills has become the new social currency. Anyone can own decks or a record player, but can you DJ? Collecting Japanese anime is cool, but have you tried your hand at drawing it or can you speak the language? A detailed knowledge on the city's best cocktail bars may be useful, but not as much as being able to mix them all yourself to members' club standard.

At the Technics DJ Academy, budding DJs can perfect their skills on the wheels of steel over intensive weekend courses. Gourmet On Tour offers a wide range of cookery holidays in 11 countries, from stays in Provence to weekend breaks at Rick Stein's Seafood School in Cornwall. Another cookery holiday provider, Holiday On The Menu, offers a full culinary experience in Morocco where British travellers learn the cuisine and go on excursions to farms, orchards and souks.

Harvey Nichols' 5th Floor restaurant's Cocktail Master Classes are popular with Londoners, but also with city breakers on birthday and stag parties. City workers are increasingly turning to status skills holidays for crash courses in golf, ballroom

dancing and shooting after being invited on a business hospitality trip to do something they have no experience of. The motivation for this type of holiday is a combination of curiosity, an interest in what goes on 'behind the scenes' and flights of fancy about what it's like to be a duke/park ranger/lady of the manor for the day.

New experiential holiday company Altyerre runs a wide selection of bespoke 'behind the scenes' holidays and executes unusual corporate events. Specialist holidays are available in a variety of areas, from cuisine to nature to shooting, but a particularly unusual proposition is their 'To The Manor Born' experience. The holiday focuses on etiquette and modern manners and is conducted by a Duchess in her own home.

SECOND CULTURES

Britons who have travelled extensively are adopting their favourite destinations as their second culture. An unwavering passion for a specific destination is encouraging Britons on return visits to learn the country's language, dance style, music, cuisine, customs and cultures. Danceholidays.com is an online operator specialising in belly dancing, flamenco, tango, salsa, samba, swing, Bollywood and Ceroc dance holidays, all in the country of the dances' national origin.

- 1 UK Automotive – the global enterprise in the UK, The Society Of Motor Manufacturers & Traders, 2006
- 2 Brits Hit The Road For Epic Holiday Drives, You Gov Plc credited by Zurich, 22/07/07
- 3 Stress-related And Psychological Disorders, Health & Safety Executive, 2006
- 4 What People Generally Want From A Holiday, GFK/NOP Mintel, May 2007
- 5 Cercle Sante – Europ Assistance Barometer, Europ Assistance, January 2007
- 6 Reform pans NHS, privatehealth.co.uk, June 2007
- 7 Hearty growth for Gastro-Intestinal remedies, Mintel, November 2006
- 8 Complementary Medicines: Healthcare, Brits Go Back To Nature, Mintel, April 2007
- 9 Experience Days Out: 1 million Dreams Set To Come True, Mintel, January 2007
- 10 Travel Watch, National Geographic, August 2004
- 11 Depletion Of The Ozone Layer, Tourisms Three Main Impact Areas, uneptie.org, 2000
- 12 Work is a four letter word for those in their 30s ... but a joy for the relaxed over 60s, The Guardian, Patrick Barkham and Lucy Ward, February 24th 2005
- 13 1 million Cash Boost For Rural Tourism, Department For Culture, Media and Sport, 14/08/2007
- 14 A Handful Of Gems, The Guardian, Alistair Sawday, March 10th 2007
- 15 Consumer Attitudes Audit™ Autumn 2007, The Future Laboratory, September 2007
- 16 British On Holiday At Home, MINTEL, March 2006
- 17 United Kingdom Tourism Survey, Visit Britain, January & February 2007
- 18 Nu Wealth Survey, The Future Laboratory, August 2007
- 19 Holiday Lifestyles – Responsible Tourism UK, Mintel, January 2007
- 20 What People Generally Want From A Holiday, GFK/NOP MINTEL, May 2007
- 21 Glasgow: Volume and Value of Tourism, SeeGlasgow.com, 2006
- 22 Floating Away On A Holiday For A New You, Mintel News Release, 18/04/07
- 23 Cycling Holidays, MINTEL, July 2007
- 24 Consumer Attitudes Audit™, The Future Laboratory, September 2007

