

Heritage and culture is an important element when choosing a holiday abroad - along with other aspects

Other elements are as key when choosing where to go

8/10 state the following as being important in their decision

Have a relaxing time



Lots of things to see and do



Famous places- buildings & attractions



Friendly welcome from the people who live there



What people look for from heritage and culture on holiday

People look for heritage and culture to provide a distinct, different *experience* from their home life

Emotional impact

- Moved, inspired
- Astonished, amazed
- Awed, intrigued
- Feel welcomed

Different experiences

- Spiritually enriched
- Intellectually nourished
- Surprised, stretched
- Sense of discovering new places & things

Immersion

- Share with the 'natives'
- Not just be a spectator
- Genuine, authentic experiences

"To feel it's genuine and I'm welcome as a person. I can relax and go where locals go"
(Germany Visitor)

"You feel there's nothing sexy that's going to happen in England. Whereas if you go to Buenos Aires you can tango under a full moon in fishnet stockings"
(US Distant Considerer)

"I can have culture in America, I can have culture anywhere. What I really want to see is the unique, varied part that makes it different to everywhere else . . . what makes somewhere distinct" (USA Serious Considerer)

"Even if it's having a beer and a drink for two minutes then I feel I've been immersed"
(France Considerer)

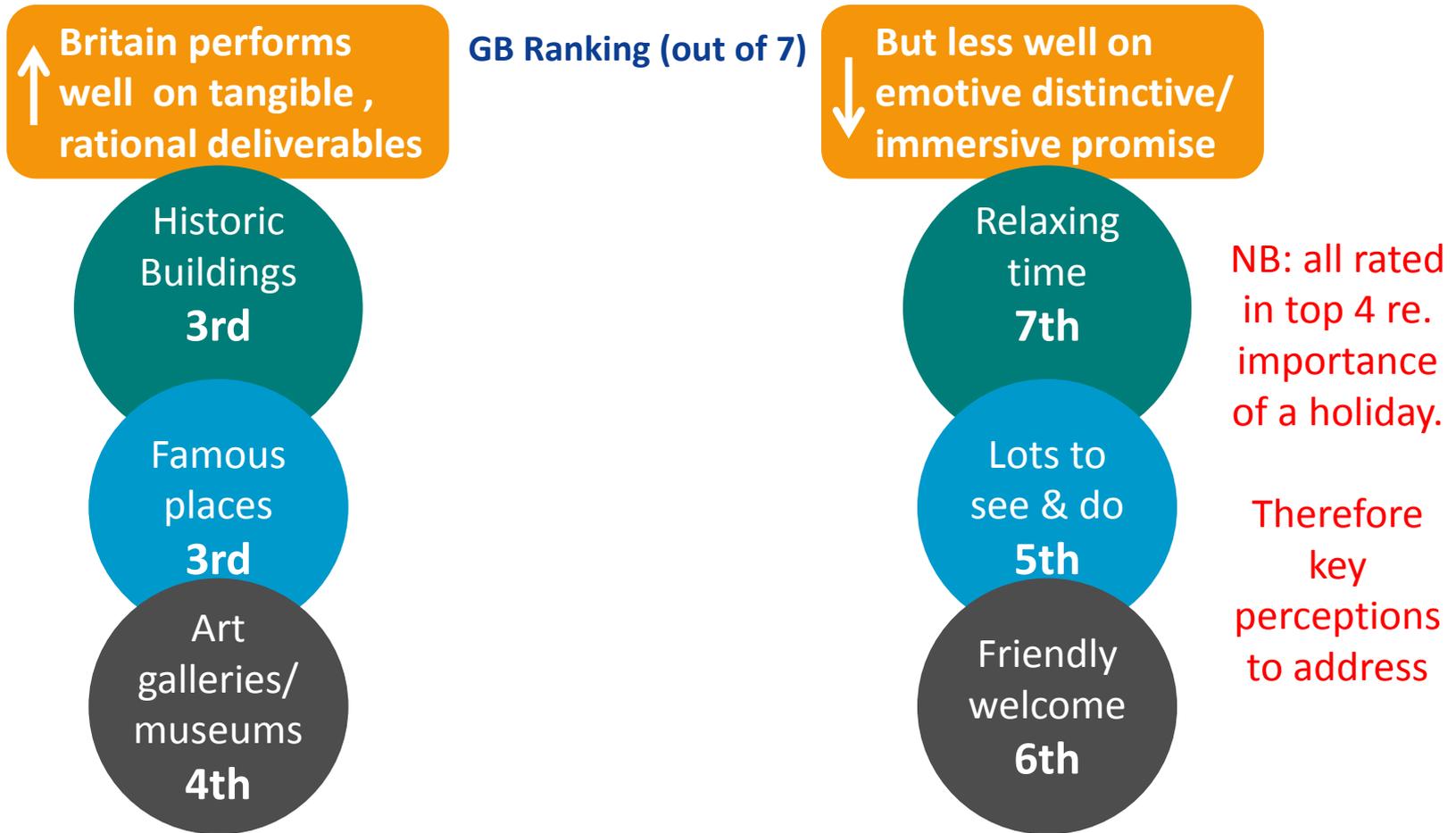
People want to absorb H&C through a variety of holiday experiences alongside specific H&C attractions



But the experience needs to be authentic & genuine

- particularly for those who feel H&C is very important when choosing a holiday abroad

Britain's competitive positioning highlights key areas on which we need to focus and improve



Statistical analysis also noted that addressing these three weaknesses would have a strong positive impact on GB consideration

To enhance tourism, we need to quench a thirst for information



People want additional information on what there is to see and do and how to go about it
60% - 70% agree they would be more likely to consider a GB holiday if more aware of

H&C
itineraries -
different
regions

H&C
itineraries -
different
themes

Ease,
speed to
travel
round

How
affordable
- to travel,
eat, sleep

Places to
see, as well
as London

Scotland,
coastal &
rural, Wales

*"I don't want to just be at
a castle for two hours
then be stranded"*

(France Distant Considerer)

*"London you'd do in four days
not ten. It's ticking off one
thing then another, in and out
of the underground, eat
something and then off you'd
go again"*

(Germany Serious Consider)

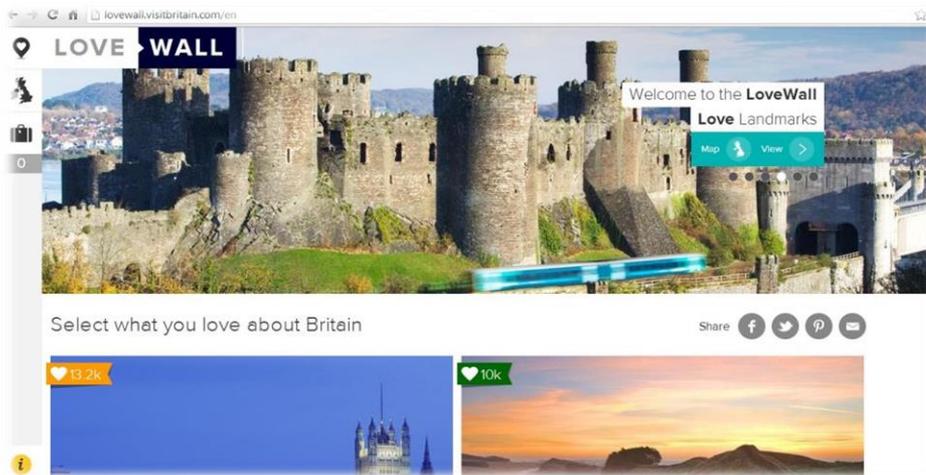
*"I see the same old pictures...I
want to hear about Wales,
Scotland, haunted castles, whisky
trails, nature . . . but you never
hear about them"*

(Germany Serious Consider)

Visitbritain.com and Lovewall.com help engage and inspire



- ✓ Suggests lots of options, choice; directional 'chunks'
 - Top 10 Royal attractions
 - Shakespeare's England
 - Pre-buy travel tickets



- ✓ Easy access to bundled 'worlds' of ideas; unique
 - Interactive 'blog style' nature
 - Personalising 'Suitcase'

MARCOMs need to inspire, be emotive and create desire

There is a need to promise / convey:

- Unexpected things I can do
- Immersive experiences - emotionally not just practically
- Genuine, authentic and distinctively / identifiably British
- Empathy - so one can transpose self into the moment
- Variety - from 'being active' to just relaxing / enjoying / having fun

And avoid

- Stock book / photo shot (false)
- Isolated / insular moment- no promise of other opportunities
- Nondescript / generic

Examples of more engaging VisitBritain imagery



**Must ensure context
to bring possibilities
to life**



MARKET SUMMARY :



	<u>Key H&C competitors</u>	<u>Key needs</u>	<u>GB strengths</u>	<u>GB weaknesses</u>	<u>Ideal holiday descriptors</u>	<u>What to leverage in MARCOMs</u>
 FRANCE	Italy Spain USA	Relaxing time Lots to see and do Friendly welcome Historic buildings Famous places	Historic buildings Famous places	Relaxing time Lots to see and do Friendly welcome (Food & drink, different culture)	Welcoming, authentic, discovery beautiful but surprising, exciting and a little quirky	Itineraries and ideas of what to see and do, details on travel around the country to see new places. Mainly London and Scotland
 GERMANY	Italy Ireland Spain	Relaxing time Lots to see and do Famous places Friendly welcome	Historic buildings Famous places	Relaxing time Friendly welcome (Food and drink, different culture, new places away from the crowds)	Welcoming, authentic, discovery, beautiful, friendly, relaxing and fun but different or traditional	Itineraries and ideas of what to see and do, details on travel around the country to see new places. Particularly Scotland as well as coastal areas
 USA	Italy (France, Ireland)	Lots to see and do Famous places Historic buildings Relaxing time Friendly welcome	Historic buildings Famous places Lots to see and do	Relaxing time Friendly welcome	Authentic, beautiful, discovery, friendly, welcoming, lots to see and do but also relaxing and educational	Itineraries, and ideas of what to see and do, details on travel around the country to see new places. London, Scotland and coastal areas Some interest in <u>free</u> galleries and museums but not a key need

Conclusions

- 1) H&C needs to be 'wrapped' with other key drivers identified to increase visitors
- 2) Britain performs well on tangible, rational deliverables but less well on emotive distinctive/ immersive promise
- 3) All markets see relaxing and having lots to see and do as being very important
- 4) All see ideal holiday as being welcoming and authentic/ genuine
- 5) All acknowledge the role of itineraries and information on easy/ cheap travel
- 6) All show interest in and desire to know more about places beyond London

Therefore MARCOMs needs to...



Quench visitors' thirst for information:

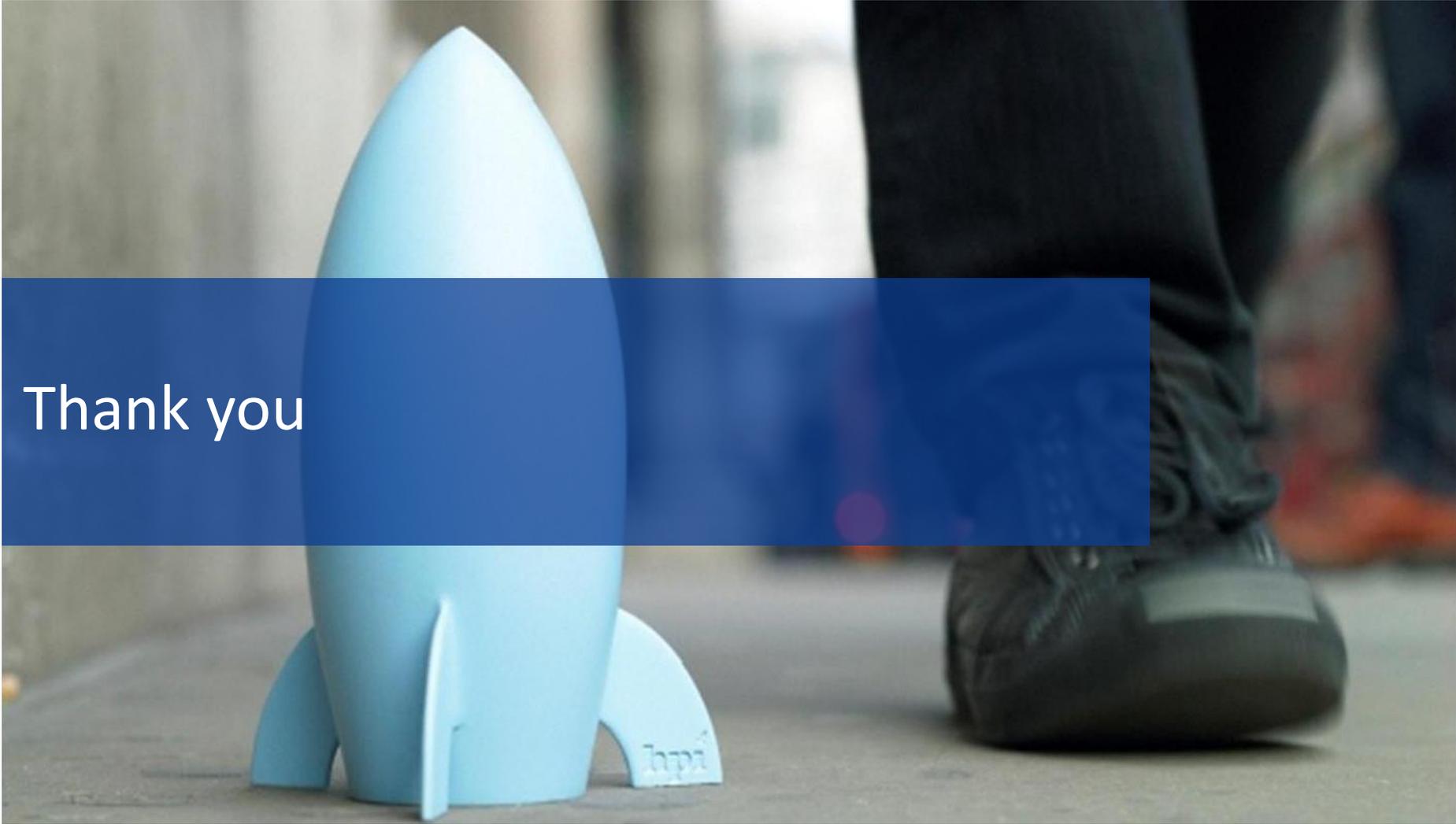
Show how visitors can enjoy a number of different experiences on holiday

Inform re. practical challenges:

Illustrate and educate

Humanise and be emotive:

Portray Britain's H&C as fun, exciting, authentic, distinctive immersive experiences



Thank you