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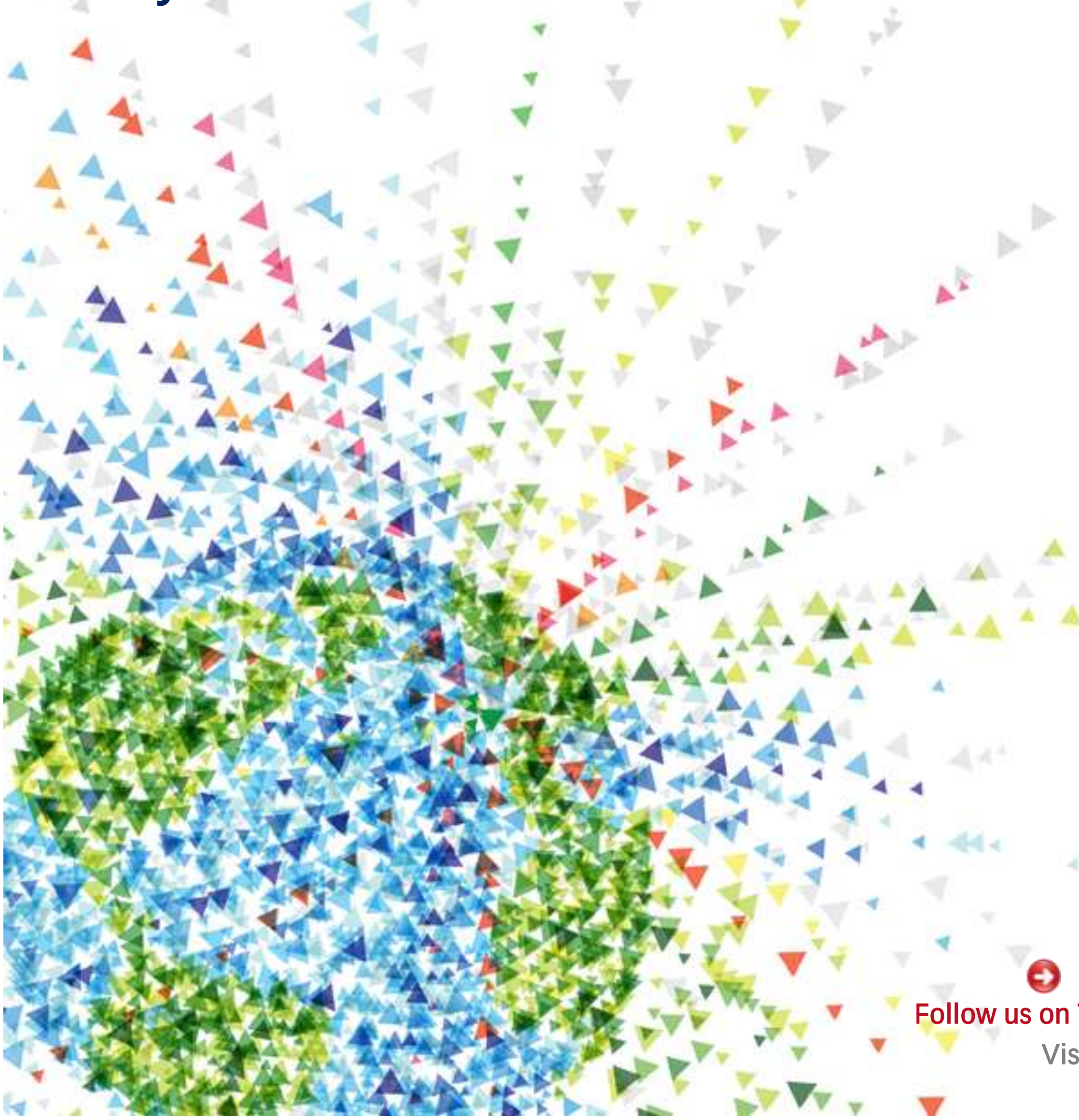

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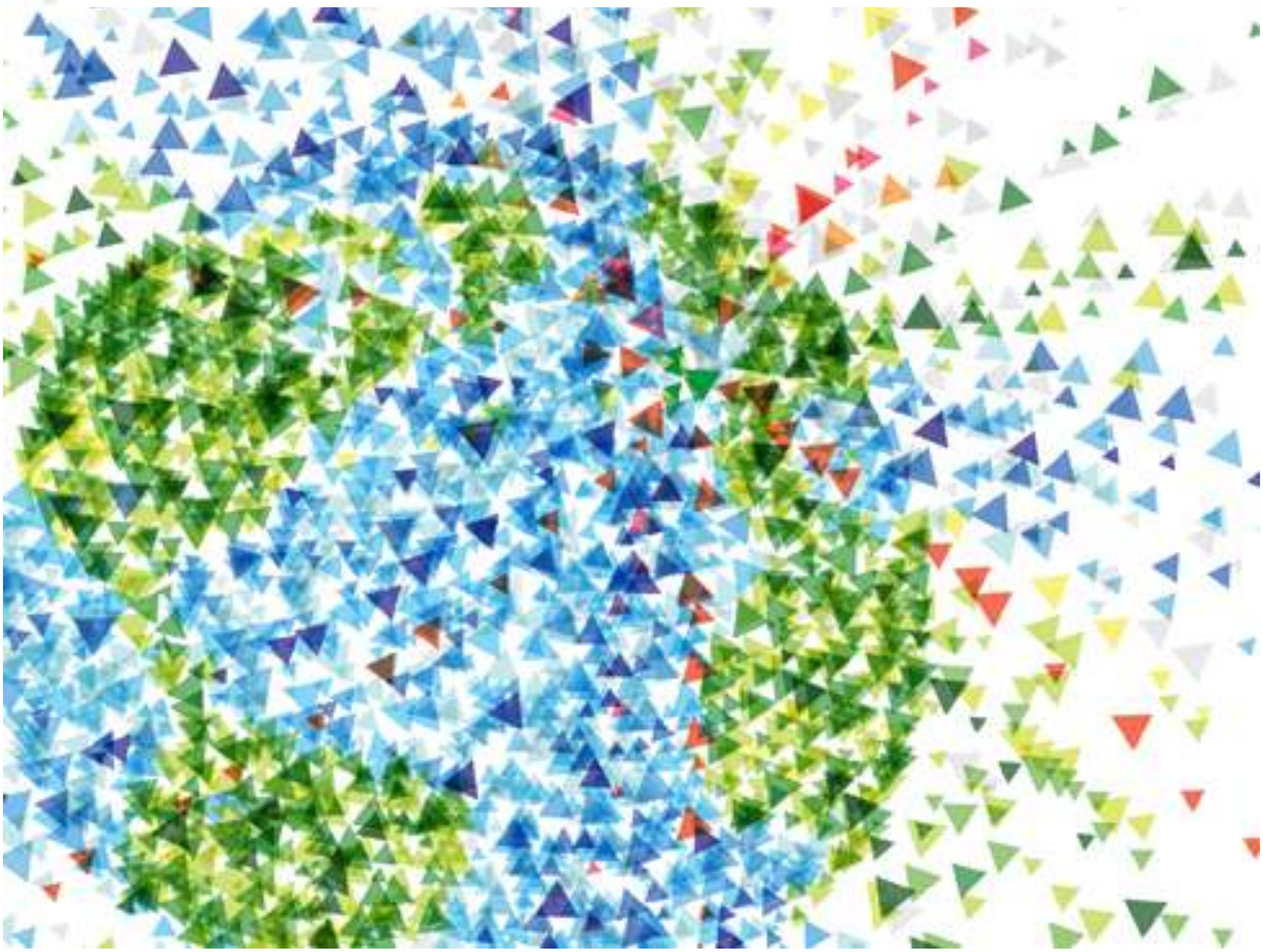


'London and Beyond'

Summary

Delivering greater 'regional spread' is one of the challenges for inbound tourism to Britain. VisitBritain recently commissioned research agency Olive Insight to conduct a study into why many visitors do not go beyond London – what the barriers are, and also what attracts those that do go beyond London to do so.

The research was undertaken in four established markets (France, Germany, Norway, and USA) via a mixture of qualitative and quantitative methods, focussing on the views of recent visitors to Britain. Please bear in mind that findings reflect views and behaviour in these markets only which may be very different in other markets (especially emerging markets).

Overall findings were

- London remains the key draw within Britain, even for those who have visited before, but many would want to see other places in Britain as well as London again when they return. 'London Plus' appeals to the majority.
- Knowledge of destinations drives desire, but knowledge of British destinations other than London can be low, although this varies notably by market.
- Those who visit London are often want to 'see' London / 'do the sights' rather than to have a particular type of holiday experience. This is different from behaviour when choosing competitor destinations, and does not reflect the growing importance of 'experiences'.
- The most common practical barriers to going outside London were concerns about transport / access.
- Most common draws for going outside London were heritage, variety, countryside, unique places to stay and the British people.
- Travel agents remain important for a minority, especially in Germany and the US, but the majority in each market report booking independently, with Britain particularly attracting independent travellers. However there is a gap for tours, packages and agents, or at least suggested itineraries, to enable trips outside London which many lack the knowledge to make the most of.
- There is no one 'ideal' itinerary when combining London with other destinations ('London Plus'), but most are willing to travel 2-3 hours to / between destinations, preferably by train.

See below for our top ten tips to promote 'London Plus'.

Introduction

London is the prime draw and destination for many overseas visits – half of the 31 million visits from overseas residents in 2012 included at least one night in London, and London is even more dominant amongst the specific holiday sector (almost two thirds of the 12 million visits from overseas for a holiday included at least one night in London). Over recent decades this has changed very little.

Whilst there are many opportunities for Britain to grow inbound tourism one of the barriers to growth is low awareness of Britain's offer outside London. As a tourist destination Britain competes against a number of other destinations where overseas visitors tend to visit a wider range of destinations, not just the capital city, as shown in Table 1. Britain is perhaps not seen to offer such a range of holiday or short break options outside the capital city as other destinations are, which risks making Britain's appeal narrower and less competitive.

Table 1 Regional spread and total visits to UK and competitors in 2012

	% of nights from overseas visitors spent in capital city	Total staying visits to country (million)
UK	41%	29.3
France	26%*	83.0
Italy	13%	46.4

**only available for 2011*

VisitBritain wished to identify ways in which this challenge can be addressed, widening Britain's appeal and increasing Britain's market share of holiday visits from overseas. A 'London and Beyond' research project was commissioned to gain an in-depth understanding of both the real and perceived barriers that prevent or discourage overseas visitors from staying outside London. We also wished to find out what the key draws were for those who do stay outside London, to see if those who do venture further are a different type of visitors (e.g. age, activities sought) or purely more aware of Britain's offer outside London.

'London Plus'

London is a leading global city destination offering world class attractions, shopping and more. It is the headline draw for first time visitors, especially those visiting for a few nights only. London is an invaluable asset in attracting overseas visitors, and presents huge opportunities in attracting especially first time visitors and those from emerging markets. There may be potential though to build on this for the benefit both of London (in terms of repeat visitors and longer stays) and the rest of Britain. This study aimed to provide guidance on how visitors could be encouraged to stay longer and so have time to stay in London and elsewhere in Britain and / or to return for a repeat visit including a stay both in and outside London.

The study explored the appeal of these 'London Plus' holidays (combining staying in London and elsewhere in Britain), to help determine the relative interest of this type of trip amongst potential visitors compared to visiting just London or just elsewhere in Britain. Suggestions for ways in which 'London Plus' could be promoted are suggested below.

Regional spread in the study markets

The study focussed on the views of recent visitors from four of Britain's high volume, established markets - France, Germany, USA and Norway. France, Germany and USA are Britain's top three inbound markets both in terms of volume and value. Norway is Britain's twelfth largest market in terms of volume and on average over the last three years visits have grown by 10% each year.

The table below illustrates the regional spread from each market amongst those visiting for a holiday in 2012.

Table 2 Regional spread of holiday visits from study markets

Proportion of visits including at least one night in …	France	Germany	Norway	USA
London	**51%**	**43%**	**53%**	**67%**
Rest of England	**43%**	**50%**	**35%**	**34%**
Southern England	24%	27%	12%	18%
South East (ex. London)	*17%*	*18%*	*10%*	*13%*
South West	*7%*	*11%*	*3%*	*7%*
Central England	14%	16%	8%	11%
East of England	*7%*	*7%*	*4%*	*5%*
East Midlands	*3%*	*3%*	*2%*	*2%*
West Midlands	*5%*	*6%*	*3%*	*4%*
Northern England	8%	11%	16%	9%
North East	*1%*	*1%*	*1%*	*1%*
North West	*5%*	*7%*	*12%*	*6%*
Yorkshire and Humberside	*2%*	*3%*	*3%*	*3%*
Scotland	**5%**	**10%**	**15%**	**12%**
Wales	**4%**	**2%**	**1%**	**3%**

Please note that as visitors may spend nights in more than one place during their stay these figures add to over 100%. A visit to an area indicates at least a one night stay.

It is worth considering the data in the context of connectivity, e.g. France has multiple routes into South East England while Norway has several routes into Scotland and Northern England (market profiles linked to below cover this in more detail). Also, with ferries and Eurotunnel visitors from France can bring their own vehicle to Britain, facilitating touring around once in Britain.

These four markets are not particularly weak in terms of regional spread – we looked to understand why some people do visit other areas and pull out 'success' stories which could be considered in other markets as well as looking at barriers.

Opportunity to visit a range of places is clearly dependent upon both length of stay and whether the trip is a first or return visit. On average in 2012 holiday visits to the UK from these markets were less than a week, and those which included London from the European markets could be classed as short breaks.

Table 3 Average length of stay (holiday visits)

Nights per visit	Visits to UK	Visits including London
France	4	3
Norway	4	4
Germany	6	4
USA	7	6

Holiday visitors from Norway are more likely than those from the other markets in the study to have visited Britain at least once before in the last ten years (more than four out of five had done so compared to only just over half of those visiting from the USA).

Table 4 Repeat visits (holiday visits, 2009)

	Proportion of visits which were return
Norway	83%
France	59%
Germany	56%
USA	54%

Study details

Each market has different opportunities and barriers to growing inbound tourism to Britain but all have connections to regional British ports (so potential visitors have access to destinations outside London) and are developed markets for international tourism and for Britain.

The study was undertaken in spring 2013 in three stages.

- Immersion session and in-depth conversations with VisitBritain research, strategy, marketing and press staff as well as with the relevant in-country managers for each market.

- Qualitative research amongst recent visitors – two focus groups in both Paris and New York, 40 in-depth telephone interviews across Germany and Norway.
- Quantitative research amongst recent visitors – overall 840 online surveys, more than 200 per market.

The recent visitors we spoke to had all visited Britain within the last year (i.e. between spring 2012 and spring 2013). Half of those interviewed had visited only London and half had been elsewhere in Britain (some in addition to London, some only elsewhere and not London).

Amongst those who stayed only in London around two thirds (67%) had only visited Britain once (i.e. their first and only experience of Britain was their recent trip to London). Amongst those who went beyond London the situation was reversed with around the same proportion (68%) having been to Britain at least twice (i.e. their experience included their recent trip to places outside London in addition to their previous trip(s) which may have been only to London or also elsewhere).

Those visiting friends or relatives (VFR) are of course more likely to travel outside London than those who are coming purely for a holiday, these visitors were excluded and the study focussed purely on those who visited for a holiday (and so do not have links to a particular area of Britain) and stayed in paid for accommodation. It also does not include those who were visiting for study or business.

Importance of regional spread

Attracting visitors beyond London has clear benefits in terms of employment and income for places around the country but is also good for Britain as a whole, and indeed for London itself. Visitors in our study in the four markets who went beyond London were more likely to stay longer and to return more often – on trips including both London and elsewhere, as shown in Charts 1 and 2.

As outlined above tourism is a competitive industry, and Britain is competing with destinations which have strong regional offers and see many overseas visits outside their capital cities. There is an opportunity for Britain to increase market share of overall visits by increasing the number of visits outside London.

Chart 1 Length of stay amongst recent visitors (those did and did not stay outside London)

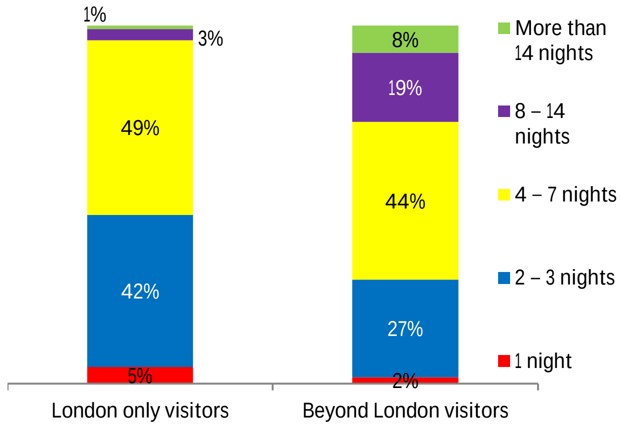
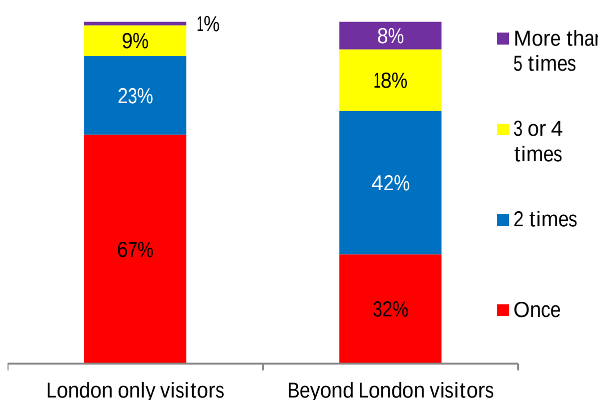


Chart 2 Repeat visits amongst recent visitors (those did and did not stay outside London)



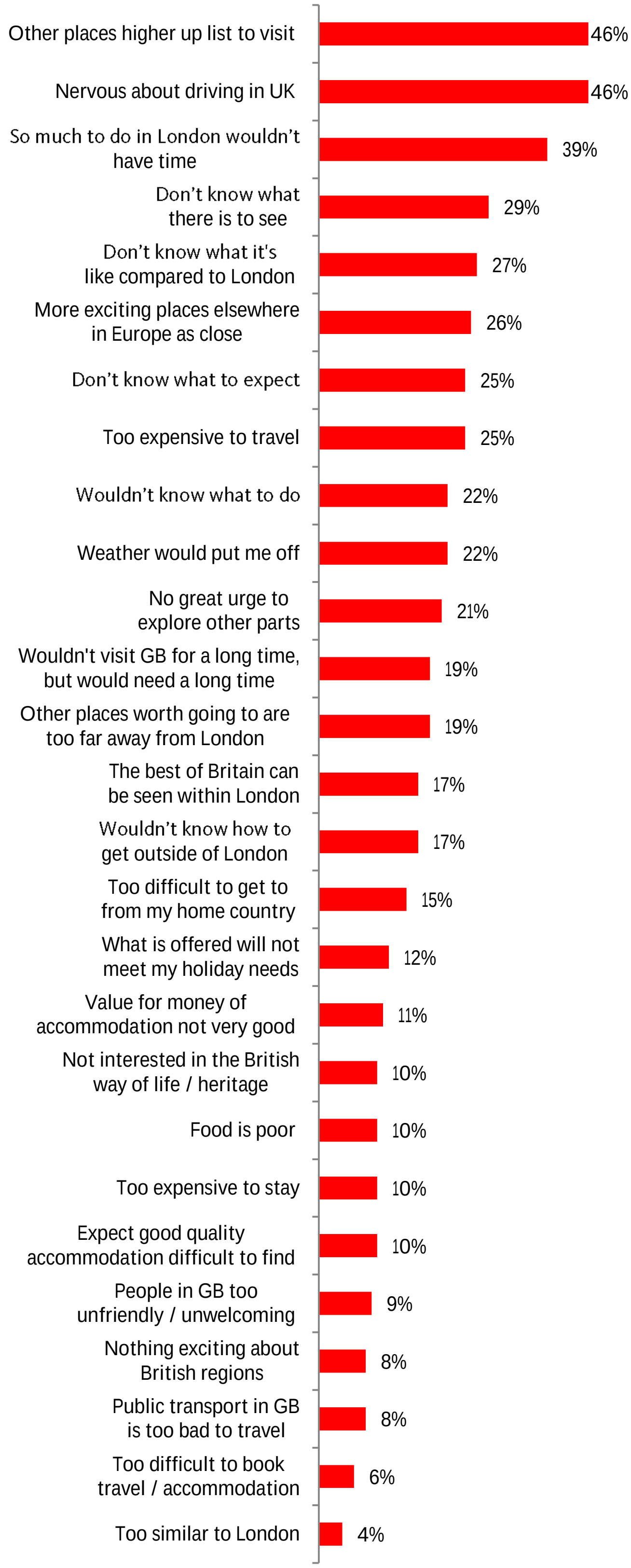
Barriers to going beyond London

Reasons for not going beyond London were explored amongst those who had only stayed in London. It was apparent that lack of knowledge, competition / lack of desire and practical concerns about transport and access dominated, as shown on Chart 3.

Lack of knowledge

In general there was a lack of knowledge about British destinations other than London. Even amongst our cohort of recent visitors to Britain, including those who have been outside London, many had little knowledge about what might be assumed well-known areas or towns, with few top of mind. There was also some confusion around which nations 'Britain' encompassed. Destinations that have been 'heard of' are not necessarily associated with their current offer.

Chart 3 Reasons why recent 'London only' visitors have never spent night in GB outside London



When asked to say what they associated with Britain initially all audiences proffered large amounts of London based imagery (Big Ben, Buckingham Palace, the Tube etc.), or location-neutral concepts (e.g. royalty, pubs). Specific places in Britain were not top of mind. Amongst those who had been outside London the most commonly mentioned associations were centred on the rolling hills and towns of Southern England, Oxbridge and Scotland.

However, levels of knowledge of Britain's offer do vary by market, with some showing higher levels than others. The qualitative research found the following,

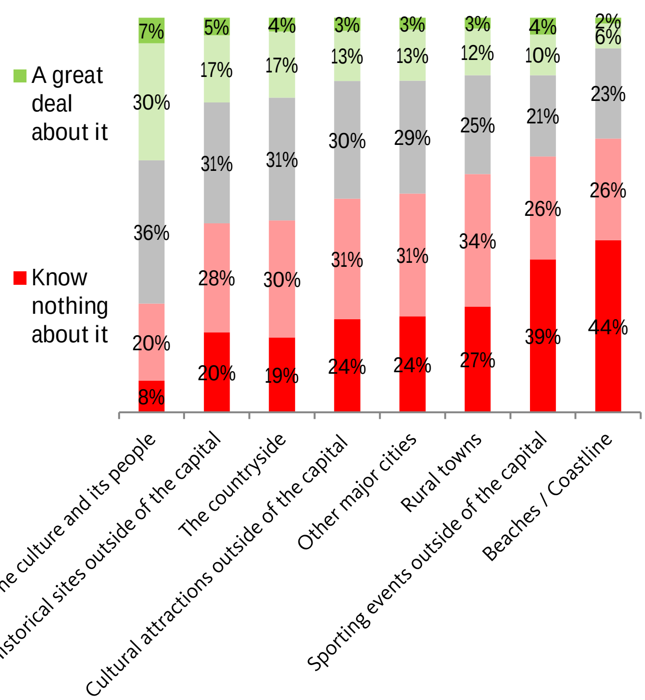
- USA (based on views of New Yorkers only) – for this market images of Britain were very much dominated by London. Scotland seemed to be part of a separate mind set, but thought of positively. There were some negative industrial associations with Northern England, linking to old-fashioned stereotypes whilst knowledge / awareness of Wales was very low.
- France (based on views of Parisians only) – there was a similar picture as in the USA but less extreme, with images of Britain largely, but not solely, dominated by London. Southern England was mentioned as appealing, with some knowledge of historical and university towns and countryside. There was (limited) awareness and knowledge of Scotland, but it was again thought of as distinct and separate from London and the rest of Britain. Northern England seemed not to be on the tourist map for many Parisians, whilst knowledge of Wales was very limited, with images of rugby and mining.
- Germany - this market was far more aware of Britain's offer outside London, but seemed to see London and the rest of Britain almost as two separate places, i.e. locations for two different types of holidays. Knowledge of Southern England, especially the South West and Cornwall, was high and some were enthusiastic about the scenery - thought of as beautiful, relaxing and peaceful. Scotland (especially Edinburgh) and Wales were also reasonably well-known, with positive images of scenery, culture and people.
- Norway – this market was the most aware of Britain as a whole. They see London as an integral part of Britain, but just as one part, not dominating it. They were also excited by, and had knowledge of, England's Northern cities (their football, nightlife and shopping), with Scotland (notably Edinburgh) and Wales also prominent (evocative landscapes, distinct culture, warm people).

Those in Germany and Norway were more likely to have greater knowledge and appreciation of Britain as a whole whilst those in France and the US (especially Parisians and New Yorkers) were more likely to be London-centric.

Two key issues are clear. Firstly there was often an ignorance of British destinations other than London i.e. what areas or towns visitors could consider and then secondly even when individual destinations are named there was frequently a fundamental lack of knowledge about the experiences on offer, and an inability to imagine the type of holiday they would be able to have there.

This was reinforced by the quantitative research which showed that amongst those who have not been outside London over a quarter (27%) said they knew nothing about Britain's rural towns, 24% nothing about major cities other than London, 24% and 20% nothing about cultural and historical sites outside the capital and 19% nothing about the countryside, as shown on Chart 4 below. Only 5% or less said they had a great deal of knowledge of any of these aspects.

Chart 4 Claimed knowledge of Britain amongst recent visitors who had stayed only in London



A sizeable minority of those who had not been outside London said they didn't know what there was to see outside London (29%), what the rest of Britain was like (27%) or what to expect (25%). Almost the same proportion (22%) said they wouldn't know what to do outside London, as shown in Chart 3 above.

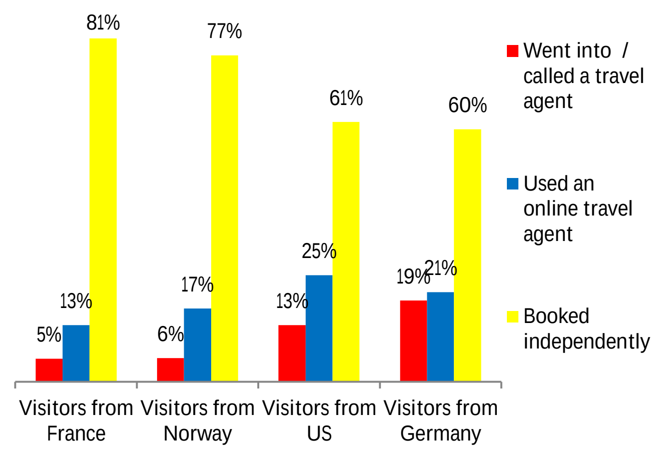
Role of travel agents

Exploring in detail the importance of travel agents and how they sell Britain was beyond the remit of this study but it did touch on experiences from a consumer point of view.

It is evident that travel agents (whether online or 'bricks and mortar') remain important for a minority, especially in Germany and the US, but the majority in each market reported booking independently, with Britain particularly attracting independent travellers. 81% in France, 77% in Norway, 61% in USA and 60% in Germany booked their holiday independently as shown in Chart 5 below.

This presents a challenge for Britain - lack of knowledge about destinations and transport points to a need for packages while increasingly complex decision making processes make for a multitude of possible routes to booking. There is now an almost never-ending list of possible 'touch-points' where visitors may look for information or advice.

Chart 5 Whether used a travel agent to book recent trip to Britain



Amongst those who did use a travel agent visitors from the US, Norway, and France were twice as likely to use an online travel agent as to telephone or go into a travel agency in person. However, those in Germany who used a travel agent were almost as likely to telephone or go into a travel agency in person as to use an online travel agent.

Booking behaviour for other destinations is different - when visiting Britain the average across the four markets was for 70% to book independently but Italian holidays were notably less likely to be booked independently (just 59% booking independently). This may indicate that Italian destinations outside Rome are more commonly sold by travel agents, and that they facilitate visitor exploration outside the capital.

All-encompassing London

The draw of London itself can, for some, deter them from going elsewhere in Britain. Two fifths (39%) said they felt there was so much to do in London they wouldn't have time to go elsewhere and one in six (17%) said they thought the best of Britain could be seen within London so they wouldn't need to go elsewhere, as shown in Chart 3.

The issue here is perhaps length of stay and numbers on a first visit, as highlighted above the market from which the highest proportion of holiday visits (amongst these four markets) is Norway, which is the market the research found most open to exploring Britain. If coming for a few days only visitors may not feel there is time to do London 'justice' and to go elsewhere.

Attracting return visitors and longer stays is crucial, to increase the nights visitors spend both in London and elsewhere.

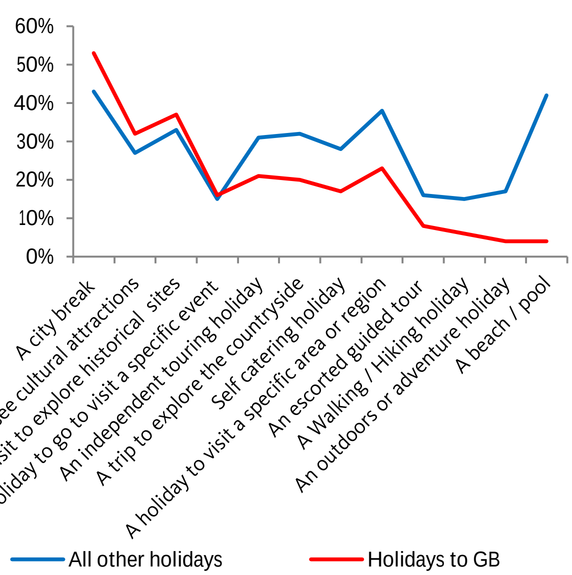
Desire to visit and the importance of 'experiences'

In attracting return and longer visits it may be that 'experiences' are key. Consumers report they are increasingly seeking holidays that are experiential with everyday culture, food, accommodation, and unique 'once in a lifetime' experiences being ranked as key to making a 'great holiday'.

Visiting specific sights or places seems less important with only around a fifth (20%) saying their holiday choices over the last year were based on visiting a specific place.

However, overall 'sightseeing' based tourism is clearly hugely important for Britain, with city break and trips to see cultural and historical attractions the most common types of trip taken as shown by the red line on Chart 6. When thinking about their other holidays people are also likely to report taking 'experience' style holidays, as shown by the blue line on Chart 6, but not in Britain.

Chart 6 Types of holiday taken in last year

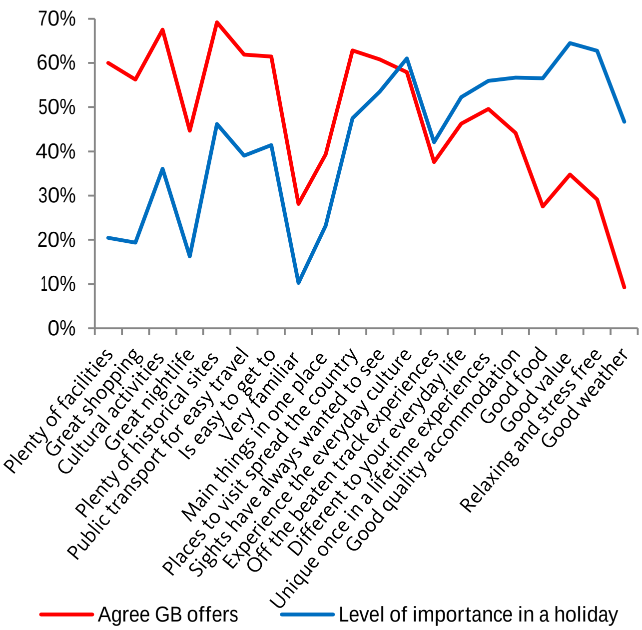


Stronger evidence of Britain being thought of as a destination with sights and attractions rather than offering experiences is evident when visitors reported what they considered Britain offers for a holiday (red line on Chart 7) and this is mapped against the relative importance of holiday elements (blue line on Chart 7).

Britain performs well for lower priority factors: facilities, shopping, cultural activities, nightlife, historical sights, public transport and being easy to get to as shown .These factors are those which could be more easily classed as specific attributes or attractions which destinations may have.

Britain performs less well on the more important factors of weather, relaxation, value, food, accommodation, unique experiences, being different to everyday life and offering off the beaten track experiences.

Chart 7 Importance of various holiday aspects and extent to which agree Britain offers



As outlined above amongst those who had only ever visited London the capital strongly influences perceptions of Britain as a whole. For these first time, London only, visitors this results in Britain in general being perceived as a 'sightseeing' destination rather than an 'experiential' one, which in turn results in them choosing a short trip and not necessarily returning once they have seen those specific sights they wished to 'tick off'. However those who had been further than London were more likely to see Britain as offering experiential holidays and as such take longer trips to Britain, more frequently, as shown above.

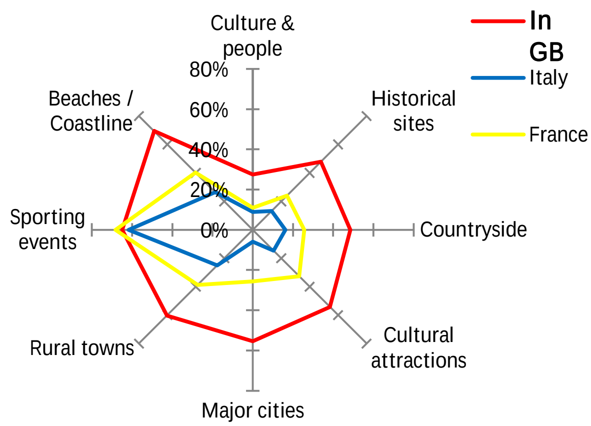
Low awareness of Britain's offer (less than a fifth claim much knowledge of offer outside of London) is intrinsically linked with low levels of interest in visiting beyond London. This knowledge-desire vicious circle is a critical barrier to encouraging more visitors to go beyond London.

Competitive context

When asked why they had not been outside London almost half (46%) said there were other places 'higher up their list', as shown in Chart 3. This lack of desire links with low levels of knowledge, but also the different types of trips taken to Britain compared to other countries.

Knowledge of Britain's offer outside the capital city appeared to be lower than that for competitor destination Italy. Chart 8 reflects the proportion with little or no knowledge of aspects of Britain or a destination, the lower the knowledge the further away from the centre the line appears. People were at least twice as likely to say they knew about the Italian countryside, cultural or historical sites outside Rome compared to the British equivalents.

Chart 8 Proportion claiming they '*know nothing/ little*' of offer outside capital city

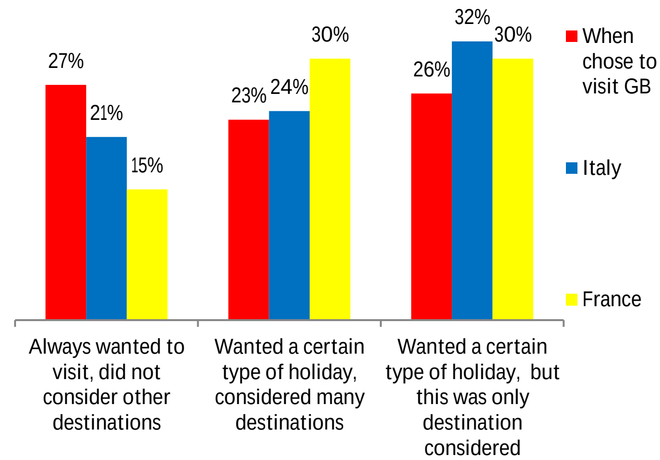


Recent visitors to Britain who had not been outside London were at least three times as likely to say they knew about major cities or rural towns / villages in Italy (only 6% and 25% respectively said they knew nothing or little about) than they were to know about those in Britain (55% and 60% respectively said they knew nothing or little about), as shown on Chart 8.

Holidays to Britain are more likely to be 'destination' led than those to other countries. When asked why they choose Britain it was more common to indicate it was to see Britain (27%) than when choosing to visit France or Italy, as shown in Chart 9.

Similarly whilst wanting a certain *type* of holiday (i.e. a particular type of experience) was a reason for around half of visitors to Britain, it was a less common reason for choosing Britain than choosing either Italy or France. When combined, 60% of those who chose to visit France did so because they wanted a certain type of holiday (equally split between 30% who considered a number of places and 30% who thought only France would offer this type of holiday), compared to only 49% who chose to visit Britain for a certain type of holiday.

Chart 9 Main reasons for choosing to visit Britain / competitor destinations



As reported above those who come to London especially are often driven by wanting to see London's major sights but this is different from behaviour when choosing competitor destinations. A third (32%) of those visiting London were doing so as they had always wanted to visit London itself, compared to only a fifth (20%) of the other holidays they took that year being 'destination led' and only 22% of those who went beyond London being 'destination led'

As Italy sees a higher proportion of visits to destinations outside the capital, as shown in Table 1 above only around 13% of nights spent by overseas visitors in Italy is in Rome compared to 41% of nights in the UK being spent in London. It may well be that the draw of the experiences on offer (and knowledge of them) makes the difference.

Transport

The most common practical barriers identified by those who had not been beyond London were related to transport or access. Almost half said they would be nervous about driving in the UK (46%), and a quarter that it was too expensive to travel outside London (25%) as shown in Chart 3.

Almost a fifth (19%) thought that other places 'worth going to' outside London would be too far from London, or if travelling elsewhere in Britain not via London 15% said it was too difficult to get to other regions in Britain from their home country. 17% even said they wouldn't know how to get outside London.

Around a quarter (26%) said there were more exciting places elsewhere in Europe which were as close to London as other British regions, perhaps reflecting a greater knowledge of transport (flights, trains, ferry) to the continent than the extent of transport available within Britain (e.g. whilst the Eurostar from central London to Paris takes 2 hours 15 minutes, so does a train from London to York or Cardiff).

Food, weather and quality of accommodation were not frequently raised as issues although it should be borne in mind that this study was amongst non-rejecters of Britain (or at least non-rejecters of London). Only around 10% thought accommodation quality, expense or value for money outside London was not very good, or that food outside London was poor.

Market differences

In terms of barriers to going beyond London the markets showed relatively little differentiation but there were some variations .

- USA – for this market two barriers were clearly most important. Firstly driving with just over half (54%) of those who had not been beyond London saying they would be nervous about driving themselves in the UK. Secondly a lack of desire / completion from other destinations, half (50%) said there were places other than Britain higher up their list of places to visit.

- France – the same two barriers were also clearly dominant in this market Again around half (52%) of those who had not been beyond London said there were places other than Britain higher up their list of places to visit. Slightly fewer were nervous about driving themselves in the UK, but still around half (49%).

- Germany - this market was a little different, the pull of London itself was the most significant barrier with 41% feeling there was so much to do in London they wouldn't have time to go elsewhere. Driving was again a key concern, although mentioned by fewer (39%).

- Norway – this market also followed the same pattern as the US and France with driving and lack of desire the most common barriers. Half were nervous about driving (51%) and almost the same proportion (48%) had other places 'higher up their list' than the rest of Britain. However, it should be borne in mind that in general the Norwegian market is more open to exploring Britain and this group who had only stayed in London are atypical.

Appeal of going beyond London

The appeal of going beyond London was explored both amongst those who had stayed outside London and those who had only stayed in London. It was apparent that very similar drivers operated amongst both groups – the aspects which had encouraged those who went outside London to do were broadly the same as those identified as potentially persuasive by those who had not yet been outside London.

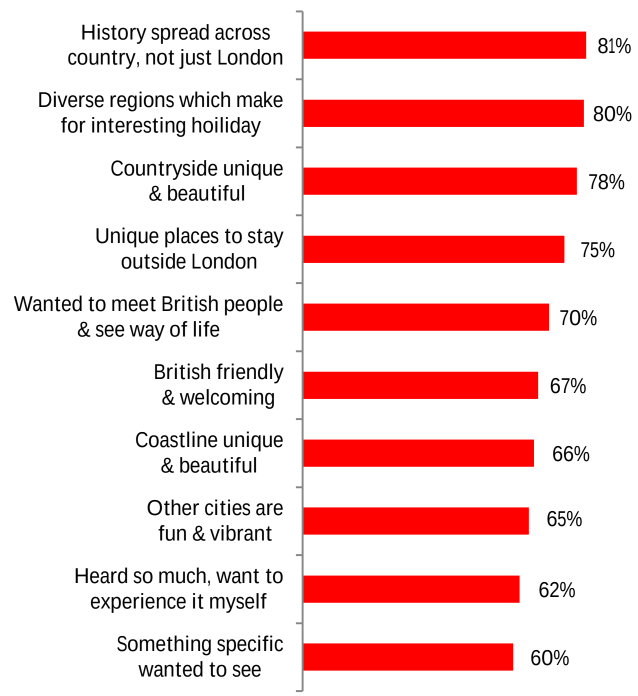
Heritage

History and heritage are strongly associated with Britain's holiday offer and the most common reason why those who went beyond London did so, given by four out of five (81%), was because Britain has history spread across the country, not just in London, as shown on Chart 10.

Amongst those who had not been outside London almost three quarters (73%) said it was this which would persuade them to go further afield, as shown on Chart 11. Just over half (51%) of those who had only been to London had 'lots of interest' in historical sites and to the majority (80%) specific cultural / historical sites would persuade them to go outside London, this being the third most popular reason out of over 20.

When discussing heritage in focus groups people talked of 'awe' and 'amazement' (especially those in the US) but also it seems there was a danger it could seem a little flat if just about seeing / ticking off major sites – it is important to get across the 'experience' and the story behind a place.

Chart10 Reasons why recent visitors who did go beyond London did so



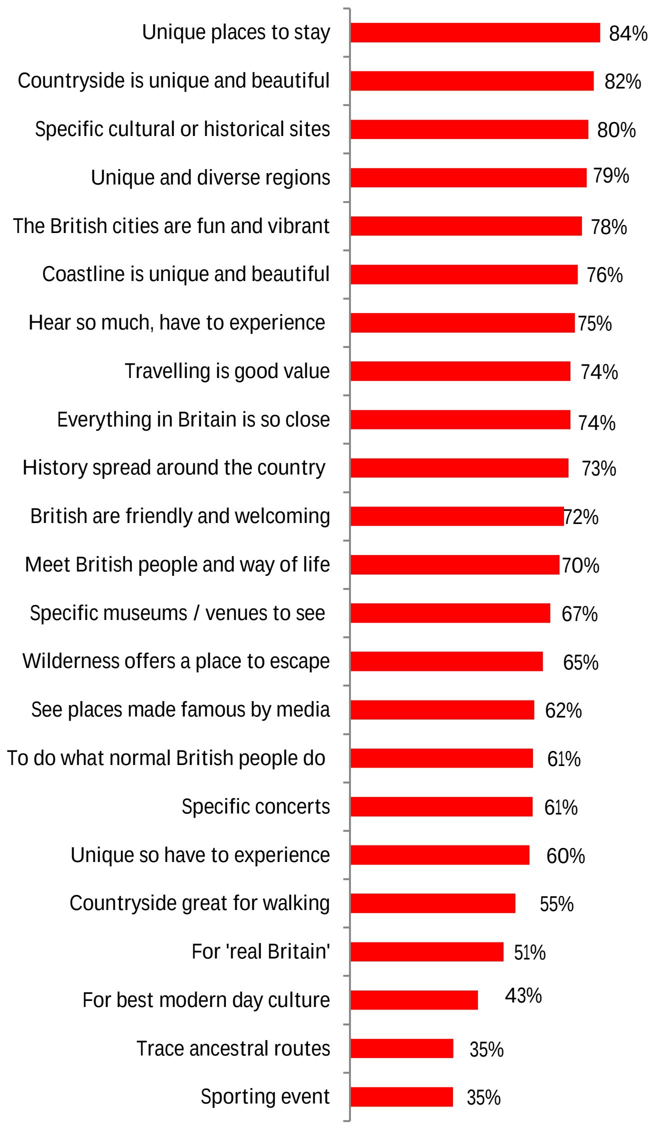
Countryside

Over three quarters (78%) of those who went beyond London gave Britain's unique and beautiful countryside as a reason for having done so, indeed it was the third most popular reason, as shown on Chart 10.

Similarly amongst those who had not been outside London the majority (82%) said Britain's countryside would persuade them to do so (the second most popular factor out of more than 20) and coastline also appealed (76% said would persuade them, sixth most common answer) as shown on Chart 11.

Qualitatively countryside came across as a major lever when thought of as unique, different, beautiful and relaxing. Both the 'bucolic beauty' of southern England and the 'rugged isolation and peace' of Scotland were mentioned. There were though some concerns raised about access and how to get there. Coastline seemed generally less motivating but Cornwall and the South West were highlighted by German participants.

Chart 11 Aspects which would persuade recent 'London only' visitors to go beyond London



Uniqueness and variety

Britain's unique and varied nature is also appealing with 80% of those who went beyond London saying one reason they did so was because Britain's diverse regions make for an interesting holiday. This was the second most popular reason for having been beyond London. Having unique places to stay around the country was also a draw, a reason for 75% (making it the fourth most common answer amongst those who had been outside London).

Amongst those who had not been outside London unique places to stay was the most commonly cited aspect which would persuade them to do so, a reason given by just over five out of six (84%). Also mentioned as a possible 'persuader' by a majority (79%, fourth most popular answer) were Britain's unique and diverse regions.

British people and way of life

Over two thirds of those who went beyond London during their recent visit mentioned the British people as a reason for travelling outside London, 70% wanted to meet British people and see the British way of life and 67% because they were friendly and welcoming.

Amongst those who had only been to London, half (49%) had 'lots of interest' in culture and people outside London and the idea of British people being welcoming and seeing British way of life were factors which would persuade around 70% (72% and 70% respectively).

Cities and culture

Of those who had only been to London a third (34%) had 'lots of interest' in major cities outside London, and Britain's fun and vibrant cities were flagged as a factor which might persuade people to go outside London by over three quarters (78%), the fifth most common factor.

Qualitatively Britain's contemporary culture (music, art, fashion, and food) emerged as key elements of interest.

Market differences

Across all four markets it was the factors highlighted above, namely Britain's heritage, countryside, culture, cities, variety and people which are the key elements of interest. However, some differences between the markets are evident.

Americans seem most motivated by countryside and history/heritage, especially when imbued with a real sense of 'British-ness' or uniqueness. French seem particularly interested in Britain's cultural offer and the countryside with British people thought interesting/quirky. Norwegians are drawn by countryside too but also the variety of regions (e.g. Northern cities with their football, nightlife and contemporary culture) and the coast. Germans are interested in British cities, countryside and Southern coastline (the latter notably more a draw in this market). In addition the British people are seen as warm and friendly by Germans and Norwegians.

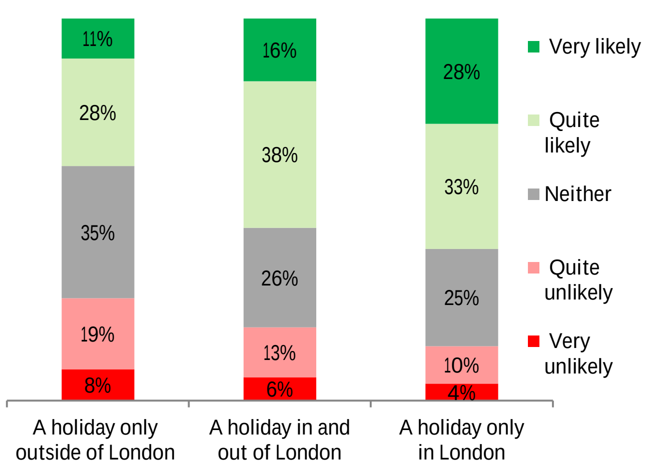
In terms of specific destinations, for Americans Scotland and the South East (countryside and heritage cities) appeal. For French visitors Southern England, especially the South East, and the East of England are popular. Similarly German visitors are attracted to Southern England, but notably the South West. For Norwegians Northern England, particularly the North West, and Scotland appeal.

Opportunity

As outlined above there is little difference in what those visitors who stayed only in London want from a holiday to those who went beyond London. Both groups are also similar demographically and in the way they book and plan holidays.

Crucially those who had not yet been outside London do not reject the idea of visiting other places in Britain in future. Seven out of ten recent visitors (69%) who had only been to London indicated they were satisfied (very / quite) with their trip, they had had a good time in London. Over half of these 'London only' visitors think they would holiday in Britain again in the next ten years. These visitors, who had only been to London so far, indicated they were interested in Britain's wider offer. So, Britain appeals and there is opportunity to encourage more visitors to return to Britain to visit both London and elsewhere.

Chart 12 Likelihood of 'London only' visitors returning to Britain within ten years



Overall three fifths (61%) of those who had only visited London say they are likely to return just to London in the next ten years, but only slightly fewer (54%) are likely to return for a holiday including both London and beyond, whilst only 38% are likely to return in the next ten years for a holiday excluding London, as shown in Chart 12.

However a return trip is not guaranteed - there is strong competition, these same recent 'London only' visitors were more interested in the offer outside the capital city in competitor destinations, especially in Italy's historical sites, major cities and rural towns / villages. Reminders of Britain's offer and facilitating visits are clearly important.

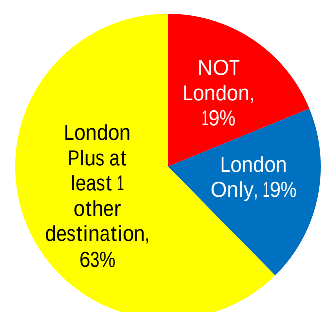
Facilitating and selling 'London Plus'

Ideal itineraries

London remains the key draw even for those who have visited before, but many would want to see elsewhere as well as London when they return with four out of five (81%) of those who had previously only been to London wanting to include London again as part of a future trip but most commonly alongside one or two other British destinations.

When asked to design an ideal itinerary four out of five include at least a night elsewhere (only 19% would stay only in London) and 'London plus' appeals to the majority, with almost two thirds (63%) saying they would like to visit London plus at least one other destination.

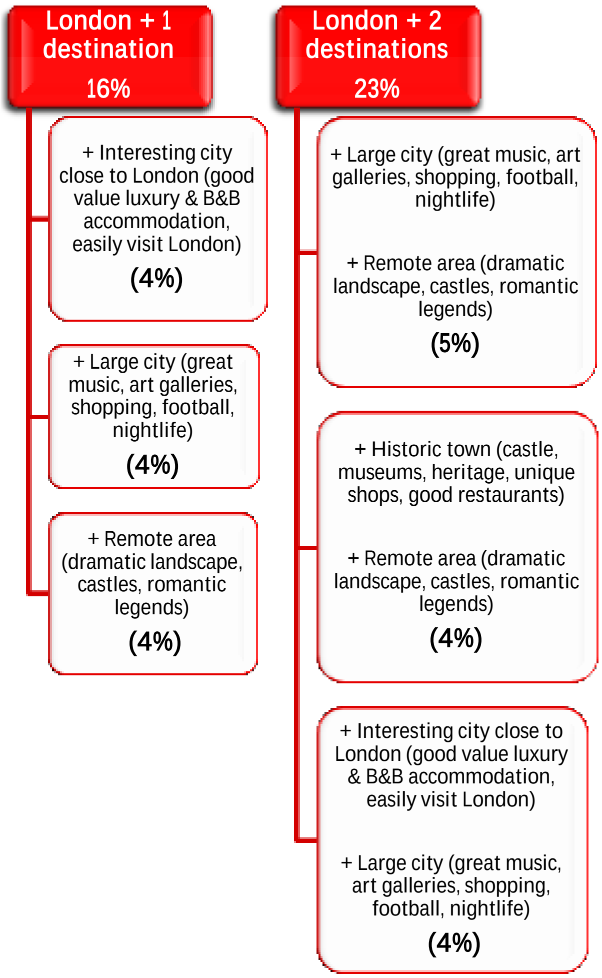
Chart 13 Appeal of 'London Plus' to 'London only' visitors if they returned to Britain



There is no one 'ideal' itinerary when combining London with other destinations, whilst two fifths (39%) would combine London with one or two destinations in their 'ideal' trip the nature of these destinations varies greatly as shown in Chart 14. Most typically these additional stops were countryside destinations, but historic cities also appealed.

Traditional countryside (e.g. Cotswolds, Kent) is perhaps the most appealing, but only very slightly with people also interested in Britain's more remote areas (e.g. Highlands, Wales, Northumbria, Lake District), interesting cities close to London (e.g. Oxford, Brighton, Cambridge), coastal areas (e.g. the South West, Wales, South), large cities (e.g. Manchester, Glasgow, Newcastle), historic cities/towns (e.g. Bath, York, Edinburgh) and rural areas (e.g. Yorkshire, Peaks, Norfolk / Suffolk).

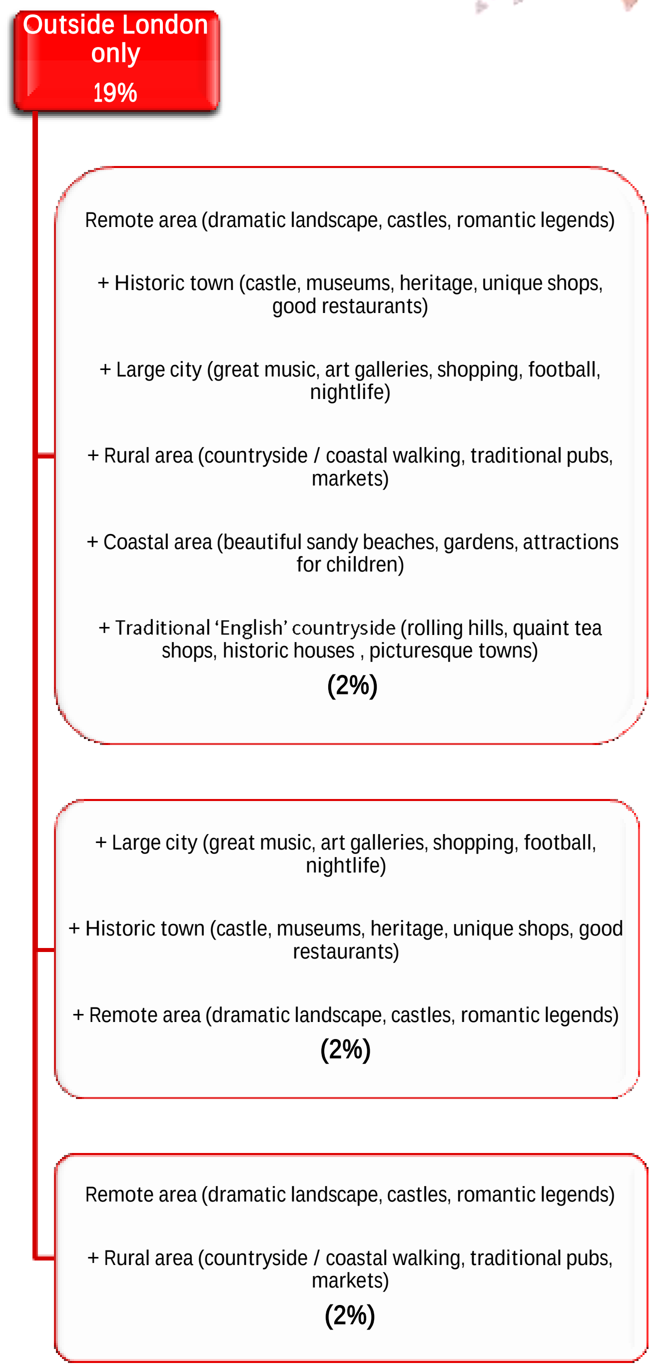
Chart 14 Most popular ideal itineraries of 'London only' visitors if returned for London Plus trip



To encourage more visitors outside London Britain needs to be seen as somewhere with destinations (in addition to London) which are able to offer the types of experiences people report they look for repeatedly (e.g. relaxation, good food) as well as headline attractions / sights (which may attract only one visit and not a return and do not necessarily encourage long stays). Britain needs to fire the imagination. Perceptions of Scotland and the 'rolling' Southern countryside with its historic cities, towns and villages are closest to providing this in the eyes of those from the USA and France, in Germany it is the South West coast whilst in Norway many have this connection with the North of England.

It should also be borne in mind that while 'London Plus' may appeal to many in Germany there was a sense that London and places elsewhere in Britain offered different types of holidays, and that in Norway places outside London were as appealing, if not more appealing than London itself. This may be similar to views in other markets with reasonable regional spread (e.g. the Netherlands) but in the majority of markets where regional spread is more limited is less likely to be the view. Chart 15 below shows the ideal itineraries for those who would not visit London.

Chart 15 Most popular ideal itineraries of 'London only' visitors if returned for trip outside London



Trains, tours and packages

Most are willing to travel 2-3 hours from their initial base (typically, but not always, London) to stay in another destination. As there are concerns about driving for many preferences are for train travel. Train was the most popular choice of transport when going between London / elsewhere, selected by around a third. A fifth (19%) said rail passes would help, as shown in Table 4.

Packaged tours and itineraries were also mentioned by many to enable them to get the most from the trip. Amongst those who had never been outside London almost a fifth (18%) said if they did so they would want to be on an organised tour with their transport arranged. When asked what would make a 'London & Beyond' trip easier they were most likely to mention package tours with accommodation and transport all arranged (38%). This again reflects insufficient knowledge of Britain amongst many visitors which deters them from, or inhibits their ability to, independently organise a multi-destination trip and highlights a potential gap for tours, packages and agents, or at least suggested itineraries, to facilitate trips outside London.

Table 5 Useful aids to organise a 'London Plus' trip

	Recent 'London only' visitors	Recent visitors who went beyond London
Package tours with accommodation & transport from port / airport	38%	26%
Packages with all accommodation arranged	24%	27%
Rail passes	19%	21%
Packages which provide specific experiences	11%	14%
Themed tours with transport & attractions	8%	12%

Maximising appeal of 'London Plus'

There is an opportunity to build on levels of interest amongst previous visitors from established markets in going beyond London. People are willing to consider going 'beyond London' but there is tough competition from other destinations which are more top of mind.

There is a widespread lack of knowledge about Britain's offer geographically (where destinations are), and viscerally (what they offer), with out-dated 'industrial' perceptions of Wales and England's Northern cities from those in the USA and France. So, there is a need to address both sides of the lack of knowledge-desire by 'educating' where visitors could go beyond London - what they could do, and see there as well as making it compelling and imbuing with a sense of emotion and how visitors might feel (e.g. excited, indulged, charmed)

In addition visitors need help accessing what is on offer as they have little knowledge and major concerns about driving in Britain.

The relative importance of levers differ by market so bespoke approaches are needed although the key elements of history/heritage, countryside, and to a lesser extent, the coast and British people / contemporary culture are consistently appealing.

London is a vital part of the British offer, even for those who have previously visited. Its draw should be utilised to get people to think about Britain, and from there to go beyond.

Top Ten Tips for promoting 'London Plus'

- ✓ Do not over-estimate geographical knowledge of Britain, or assume potential visitors will be aware of even high-profile destinations outside London.
- ✓ Focus on the heritage, variety and countryside outside London as well as unique places to stay and the British people.
- ✓ Make sure the 'experiences' the destination offers (e.g. luxurious, adventurous) are reflected, and indicate how people will feel (e.g. relaxed) when there, as well as the attractions / destinations themselves.
- ✓ Do the work for visitors by putting together set itineraries, illustrating the 'packages' they could put together themselves.
- ✓ Remind of enjoyment of previous trips to London and include London in suggested itineraries but build on appeal by showing that Britain can offer even more than our capital's world famous headline sights on a second visit.
- ✓ Showcase opportunities to relax, enjoy good food and unique / unusual experiences and places to stay.
- ✓ Avoid inadvertently re-enforcing out-of-date stereotypes of destinations.
- ✓ Compare Britain's offer favourably with similar, well-known 'regional' offers in other countries (e.g. Cotswolds / Tuscany, York / Seville, Scottish Highlands / Swiss Alps, Cornish coast / Spanish Costas). Flag unique or 'off-the-beaten-track' experiences in Britain, away from mass tourist hotspots.
- ✓ Avoid itineraries where driving / hiring cars is essential (although in some markets this will appeal). Facilitate rail travel, for example highlight booking trains ahead reduces cost considerably, or suggest use of a BritRail pass.
- ✓ Show travel times rather than distances from London (or between destinations) by train. Remember for most visitors tolerance is 2-3 hours travel time between destinations.

Further information and research

VisitBritain makes International Passenger Survey data from the Office for National Statistics available to download from our website. You can view visits, nights and spend to different areas of the UK, much of which is broken down by market, journey purpose and more here, Inbound visitor statistics for UK nations, regions, counties and cities/towns.

Also view our flagship Market Profile reports for over 20 markets, which include in-depth coverage of regional spread, market conditions, attitudes to holidays, reaching consumers, the travel trade and much more.

You may also be interested to read more about VisitBritain's marketing or the Britain Tourism Strategy.

Table 6 Data Sources

Source	Charts/Tables
Office for National Statistics, International Passenger Survey, 2012 unless specified	Table 1, 2, 3, 4
UNWTO, Banca d'Italia, French Ministry of Commerce and Tourism	Table 1
Olive Insight, London and Beyond (commissioned by VisitBritain), spring 2013	All other tables and charts

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