



Discover England Fund
COASTAL TOURISM

2017 Activities & Themes International Visitor Research Highlights



VisitEngland™

What Is The DEF Research And What Is This Research Overview Based On?



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OVERVIEW	KEY IDEAS	KEY IDEAS	SURPRISES	TOP ACTIVITIES	BEHAVIOUR/INTEREST	RESOURCES

Background to the highlight summaries

One Minute to Midnight and Maru/edr have completed 2 primary research projects relating to the Discover England Fund for VisitEngland in 2017, both based on **qualitative** and **quantitative** research. As part of sharing the insight among stakeholders and partners, we've also created one-pagers by Activity and Market, and presented key ideas at the Discover England Fund Year 2 conference.

These summaries continue to make use of and communicate the insight generated from those projects, using data from both the qualitative and quantitative Year 1 research projects undertaken in 2017 focusing on the different types of destinations: Countryside, London & Major Cities and Smaller Cities & Towns. In addition to this, we also draw on wider findings from years of work in the sector and directly with VisitEngland/VisitBritain addressing the needs and attitudes of the international visitor in general.

The sample for this summary, therefore, indirectly consists of visitors and potential visitors to England, primarily from the US, Germany, and the Netherlands, but is also supplemented by quantitative data from Spain, France, Australia, Italy, Norway, and China.

Research conducted by:



QUAL



36 In-Depth Interviews, 3 markets

QUANT



15,317 Online Survey Completes, 10 markets

4 Key Ideas From The Wider DEF Research

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The English Difference

For England, the key appealing quality is contrast – with modern life, with the rest of the world, and even with London itself.

England provides stimulation in its differences. International visitors can find it in the difference between the reserved characters they see in TV and film and the eccentric people they find when they visit attractions like Pencil Museums, or the classy gentleman of literature compared with the tipsy fancy dress-clad football fans they see at a game.

They see it as they look at something that's the world's oldest while they're hearing that Bristol is home to the zeitgeist of street art.

Even the referendum on exiting the EU result suggests to the international visitor that England is home to dramatically contrary views and ideas.

“ *In the countryside what's lovely are these tiny weird little museums – the weirder the better. The countryside is covered in them. These British people are completely obsessed with something!* – International visitor from the Netherlands

“ *The Islanders they are different ... They are crazy. But I want to see why!* – International visitor from the US

Low Regional Awareness

Regions have little or no recognition (Germany leads what little knowledge there is) even when they've been visited...or look on paper like the ideal destination.

Even an area like the South West doesn't have the depth of international brand awareness we might expect (it's dominated by Cornwall)

Where other regional awareness exists, it's often around sports teams, musicians, or, very occasionally, England's industrial heritage.

“ *I've been up these mountains somewhere, but I don't know the area* – International visitor from the Netherlands

“ *York's supposed to be very picturesque but I have no idea what's there.* – International visitor from Germany

Things That Couldn't Be Found Anywhere Else

Visitors have 2 key ways of assessing things to see and do on holiday: 'things that are different to what I get at home'; and 'things that are different to what I could get anywhere else'.

These international visitors were usually looking for an 'English Holiday', not always purely their 'holiday type' - a holiday to England is generally motivated by a desire to experience England and its people.

Often they find this in meeting local residents, doing the things locals do, and eating and drinking what locals do – any chance to portray activities and experiences in this way helps them appeal to the international visitor.

“ *Dover, Battle of Hastings – France or Germany you're not going to see that, or New York or California either!* - International visitor from the US

“ *Every country of course has its own culture, people habits and routines England has the English, the language, the customs, they go to the pubs for their food and drink. The way they dress, the style and traditions.* – International visitor from the Netherlands

London Versus?

The best way to understand and categorise something is often by defining what it is not, and international visitors are no different in their approach to England.

A clear contrast to London is often behind the appeal of non-London destinations for visitors – it's how they appraise them, how they define them, and how things become word of mouth-worthy when they return home.

This idea of 'London Versus' can be a really effective way of thinking about how we describe and promote different parts of England's tourism offer in a way that makes sense to Visitors.

And by its very nature, it helps them think about the unique selling point of a destination too.

“ *Everything in the Netherlands is cultured, but in England there's vast expanses of openness. I like this idea of going from a big city to somewhere sparsely populated* – International visitor from the Netherlands

Unexpectedly, The Coast Often Isn't A Natural Association For England!

For an island nation, visitors often surprised themselves by how little they associate the coast with typical England.

While English residents think of England as a coastal nation, it can often be a surprise to international visitors to see the range of coastal scenery and terrain England has to offer.

International visitors know it doesn't make sense when they think about it, but parts of the coast come as a huge (and pleasant) surprise.

“*The coastal part, I've never sat down and thought of England as a coastal place, which is funny because it's an island! I think of England as being much more cultural and museum-y and Ireland as the untouched beauty place.* – International visitor from the US

Interest In The Coast Is Driven By What It Can Reveal About 'The English Character'

There is an opportunity to isolate those parts of the coast that feel like they reveal something about what it means to be English, so the coast can be tied into the story of discovery of England.

Cliffs and the village life of fishing villages resonate most with international visitors' perception of the English identity, while beaches and resorts are both difficult associations and aren't expected to reveal anything about life for the English - they don't feed the natural curiosity of international visitors.

Whilst a short coastal and countryside walks are the most considered activity (62%), it's important to think about the human, what they say about the English' sides of this activity in general communication of the experience.

“*In a fishing village I'd just get fish and a coffee and see how people live there because it's very very different to here.* – international visitor from Germany

Dramatic, Different Scenery Is Appealing, But Has A Challenging Competitive Set

The cliffs and rugged coastline can feel very different to German and Dutch audiences, and that makes them very appealing.

However, Ireland and Scotland are so strong in visitors' minds, it may prove difficult to fully claim the rugged coast territory from these immediate neighbours without significant effort.

“*The coastline, it's a combination of definitely in England and it is rugged coastline, and that's very appealing to me. Absolutely it's unique – can't find that in Holland!* – International visitor from the Netherlands

Poor Perceptions Of Visitor Product Remain

Despite signs that the image of accommodation standards is improving, there's still a relatively poor perception of the visitor product.

As well as countering some perceptions by some international visitors of slightly 'tired' English seaside hotels, highlighting the availability of more up-to-date accommodation where possible can help the more conservative visitors feel comfortable planning trips to the English coast.

“*The English coast was good in the 50s and 60s but now it's decaying and rusty, going downhill fast places. Maybe it's fascinating because it's all morbid and dead.* – International visitor from Germany

Motor Boat Rides And Canoeing / Kayaking Are The Most Appealing Water Sports Activities

Interest in water sports activities is particularly relevant to coastal tourism. From the 24% who would consider water sports activities, 52% would be interested in motor boat rides and 48% in canoeing or kayaking. Sailing (40%), jet-skiing (37%), surfing/windsurfing/kitesurfing (34%), and water-skiing/wakeboarding (30%) make up the overall top 6 for potential interest.

4 Things You Might Not Expect About International Visitors And The Coast

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They Can Have Quite Basic Expectations Of What There Is To Do At The Coast

Low awareness means images of things to do in the international visitor's mind may be quite simplistic.

It's a challenge for converting bookings, but also for maximising their spend and engagement once they're here.

“ I didn't realise they had coasts and cliffs like that in England. I thought we have enough coastline of our own but this is different – International visitor from Germany

Even Non-Thrillseekers Can Still Be Tempted To Dip A Toe In The Water

While the audience for intense, single-minded activity holidays is niche, England is seen as a good potential place to try light outdoor activity, which includes beach and coastal walking, boat trips, paddle-boarding, and swimming.

England struggles to plausibly claim extreme or serious adventure activities with mainstream audiences, who can't help but compare it with global competitors.

“ I'm not the beach type, but I HAD to go to Blackpool, one of their famous beaches – International visitor from the Netherlands

They're Usually Quite Forgiving Of The Weather

There isn't the expectation of perfect sunshine and a beach holiday on the English Coast.

In fact, the international visitor can get quite frustrated by depictions of the English Coast that suggest it will be like this, as it feels inauthentic.

They are, however, quite open to activities and experiences which actually acknowledge the weather if they feel they show something about what it is to be English – things like windswept walks, rainy boat trips, or brisk coastering can all appeal if they're positioned in an intriguing way.

“ I definitely want to go to the pubs and see the pub culture there. I want to get out to the countryside and see the country pub culture there. I want to be annoyed by the weather there and then go to the coast and be annoyed by the weather there! – International visitor from Germany

They Can Be Interested In The Very Simple Side Of Coastal Life

It's not just the big drama of giant cliffs they want to see – some of the most memorable experiences for the international visitor have been watching the boats come in with a cup of tea, visiting a fishmonger's, or just watching seaside life go by.

These experiences feel authentic and uniquely flavoured by English life.

“ In England you go on little strolls, really, walking from one shop to the next. You can walk forever and ever along the beach, I once did it all the way to Christchurch. – International visitor from Germany

Top Activities For The Coast



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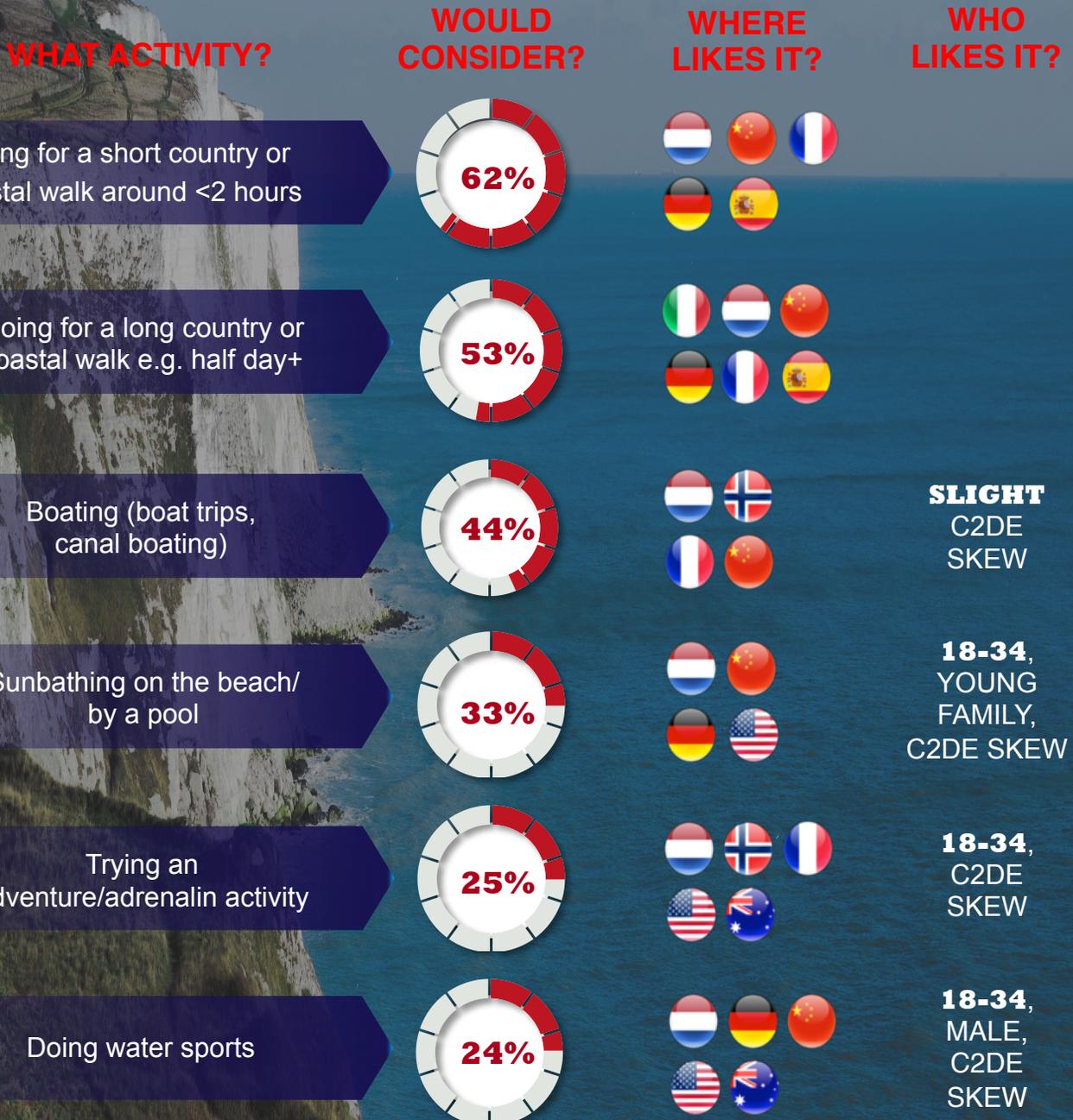
RESOURCES

As part of the DEF quantitative research carried out in Q1 2017, we asked over 15,000 international visitors about their consideration of 45 activities in England if they were to visit.

While this is a measurement of expected behaviour rather than past behaviour, the figures below are a useful guide to the relative appeal of these activities and experiences.

Please note, this is only a selection of the activities included in the survey and some activities will feature in other versions of this content.

Based on QA1_1. Likelihood to consider on holiday to other country, countries displayed rank this activity higher than average for interest in doing



Want to know more? Individual activity one-page summaries are available for these and all 45 of the key activities – check the VisitEngland research hub at <https://www.visitbritain.org/product-development-research> for more details

How Does International Visitor Behaviour Compare To Potential Interest?



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Past International Visitor Behaviour¹



Where Likes It?

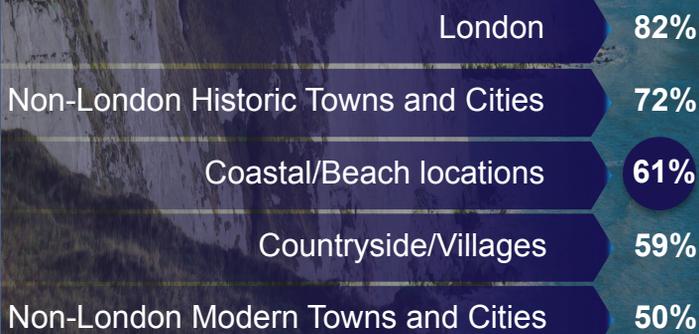


When you combine visits to the English Coast as either a sole destination, as part of a London visit, or in combination with other non-London destinations, the coast features in up to 23% of International visits

1. QD7. Which of the following types of holiday have you taken in England during the past five years? Please select all that apply

Base : All who've visited England in last 5 years
Please note: Unless otherwise stated, categories non-exclusive, e.g. international visitors may have selected more than one option

Future International Visitor Interest²



Where Likes It?



61% would now consider England's coast as part of their next visit to England. This is a large increase on past behaviour, suggesting high potential for this asset if desire can be activated by raising awareness and providing products and experiences which appeal at the right time, in the right place, and to the right audiences. Please see the following page for further details of resources.

2. QD2. Which location/s would you consider visiting as part of a holiday to England?

Base : All Respondents considering taking a holiday to England in future
Please note: Unless otherwise stated, categories non-exclusive, e.g. international visitors may have selected more than one option

Where Can I Find Out More?

There's much, much more to explore in the full reports

The quantitative reports include easy short factfiles on activities, and markets, as well as the in-depth data on interest in various activities and themes.

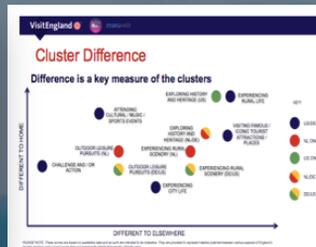
And in the qualitative report, you'll find much more on differences, relative strengths and challenges for each of the clusters, and ideas behind turning the everyday into something extraordinary.



BY ACTIVITY



BY MARKET



STRENGTHS & CHALLENGES



Optimising the Discover England Fund Application through Insight

One Minute To Midnight/Maru
 14th March 2017

- How many international visitors would consider this theme or activity?
- What markets are most interested in it?
- General information and profiling of the international visitor, split by market

Discover England Fund Visitor Research Qualitative Presentation

One Minute to Midnight & Maru/edr
 March 2017

- What are the experiences that people get excited about?
- What are the qualities they look for in an English holiday?
- What kind of things can we talk about and highlight to increase appeal to the international visitor?

For more information, visit <https://www.visitbritain.org/activities-and-themes>