



# Discover England Fund **COUNTRYSIDE TOURISM**

2017 Activities & Themes International Visitor Research Highlights



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



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## 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

# Some Essential Ideas: England's Countryside



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## In many ways, the Countryside is the soul of true England in visitors' eyes

And as a key part of the appeal of English holidays, the countryside appeals well beyond the outdoor and activity enthusiast audiences. But there's an important distinction in terms of motivation to visit – countryside is much less motivating than rural life. This village life has universal appeal across markets and segments, and highlight the difference to typical experiences of London enough that they have potential to motivate repeat, extended and new visits.

“I want to go into a local pub and have some bitters (sic), to me it's doing what the locals do, having some bangers and mash or shepherd's pie, wooden sign with gilded letters and a crazy name. Not being rejected by the locals!” - International visitor from the US

“This is the way I picture the countryside. I don't exactly know the golden houses and old houses but it's typical England. This too – the wide open countryside, you could go for endless walks and encounter something new every time. It's surprising, the element of surprise – not every corner but I'm curious, I'm adventurous, and with a friend could chat for hours and enjoy the surroundings. Wood fireplace, cup of tea, the cosiness and warmth inside these houses, small villages.” - International visitor from the Netherlands

## The English countryside & rural life feels like travelling back in time

One of the key elements of the appeal is the connection to a lifestyle which many international visitors feel they've lost in their own countries.

“England trips always start with London, it's a major world city y'know? But outside London is a rural extension, rural quaint life. People live differently outside of London - old small towns, you see their lives and how they interact, people going to work.” - International visitor from the US

“It's authentic, old small streets. It's romantic actually, going back in time, it's a contrast. We have small villages here sure, but in England I haven't seen them yet. Where I've been in Barcelona it's authentic at times, but doesn't compare to England. It's older, further back in time, it's special! Don't know why I feel like this, it's hard to tell, but it's the unknown!” - International visitor from the Netherlands

“You'd see what life used to be like and what life is like now, it's original, and so different to here, typical rural life that we don't have any more, so different to us here now. The carefree attitude to life.” - International visitor from Germany

## Villages are the star

Rural life and rural scenery are quite different things to the international visitor. Rural life is centered on people, everyday life, and the soul of the country. Rural scenery appeals to some, but can seem to be generic fields and hedgerows – which everyone has in their own country.

Villages feel more authentic and personal, and a closer representation of 'true' English life than almost any other activity or asset. They typify the image of England which many international visitors hold in their mind.

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 – and villages are often the key to that.

“Rural areas are a must, I like it that it's quiet. When it's rural I can see how real people live, in the centre of town they run around blindly past each other, in the countryside it's easier to get in touch with people. I help people with zimmerframes and then they tell you their life stories!” - International visitor from Germany

“These little cosy villages, that looks great with the roses climbing up the front, that's great. That lit up cottage at night, campfire romance, in a village like that I'd go to a dark brown wood panelled room in a little guesthouse. In the evening I'd sit in the pub, in the daytime I'd walk around and see it all in half an hour. I'd eat there sleep there and then next day go somewhere else.” - International visitor from Netherlands

“I'd rather visit many gardens in villages than go to something too touristy even though I know it's unique.” - International visitor from the Netherlands

“Northern people are like northern German people, dour and they don't talk to you, but maybe the barman would.” - International visitor from Germany



People interested in visiting rural areas & villages are 11% more likely to want to try local food & drink specialties – a huge 84%



People interested in visiting rural areas & villages are 17% more likely to want to experience local traditional events – a healthy 72%

# 3 Things You Might Not Expect About International Visitors And The Countryside

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## Forests and Mountains can struggle for credibility and differentiation to the international visitor

International visitors can struggle to see England as a destination for 'extreme' scenery like mountains, especially in comparison to what they can find at home or in other destinations.

“Mountains? In England? Okay, sure... But they're like hills, right? They're not like Yellowstone or even up in the Hudson Valley?” – International visitor from the US

“Forests? You wouldn't be able to tell it was an English forest, would you? I wouldn't.” - International visitor from Germany

“A forest. We have those in Holland as well...” – International visitor from the Netherlands

## Everywhere has rural scenery, but only England has rural English life

The uniquely positioned rural life on display in England's countryside is one of the clearest examples of contrast to what's on offer in other destinations around the world.

Rural life is the most compelling part of this experience – scenery is more generic

“I'm very curious – first of all I want to see the countryside live and not just on the TV. That's what I'd really like because it's such a contrast to ugly life in Hamburg.” – International visitor from Germany

“Fish & chips, lots of rustic places to stay, beautiful gardens and tea houses, beautiful country houses – that's what I want to go and visit those places for!” - International visitor from the US

“These images of cottages at bottom are typical English tiny tiny cutesy things, I do like that. These fields, they're not typical, we have fields like that too! I like open spaces where the air is clean, you can recuperate there.” – International visitor from Germany

## Outdoor leisure pursuits have frequent appeal as an add-on

As part of other activities and experiences, these are generally quite appealing, and can be relevant to lots of holiday types as this kind of add on rather than the focal point of a visit.

The challenge is that some audiences find these things less exciting as standalone activities. Because of this, for a lot of people, they didn't fire up the senses enough to motivate a trip to England in themselves.

Gentle outdoor pursuits are almost by their nature quite generic – it means they struggle to feel distinct to any particular country on a holiday.

“If I'm somewhere and there's one nice attraction to hike to or boating maybe, I'd do them.” - International visitor from the Netherlands

## Rural England also appeals to younger visitors

Younger visitor audiences are often the most interested in people and culture.

They can find people and culture in anything – even things which we might assume are too 'boring' for them. They still appreciate the quintessential gentle side of England.

We should not assume they will solely be interested in nightlife and cities – the countryside and rural areas can be packaged for them too.

“These are pretty homey pictures, my home is my castle, sturdy is the way I'd describe it. You could snuggle up to the fire with a port and read a book.” – International visitor from Germany

# Top Activities For England's Countryside

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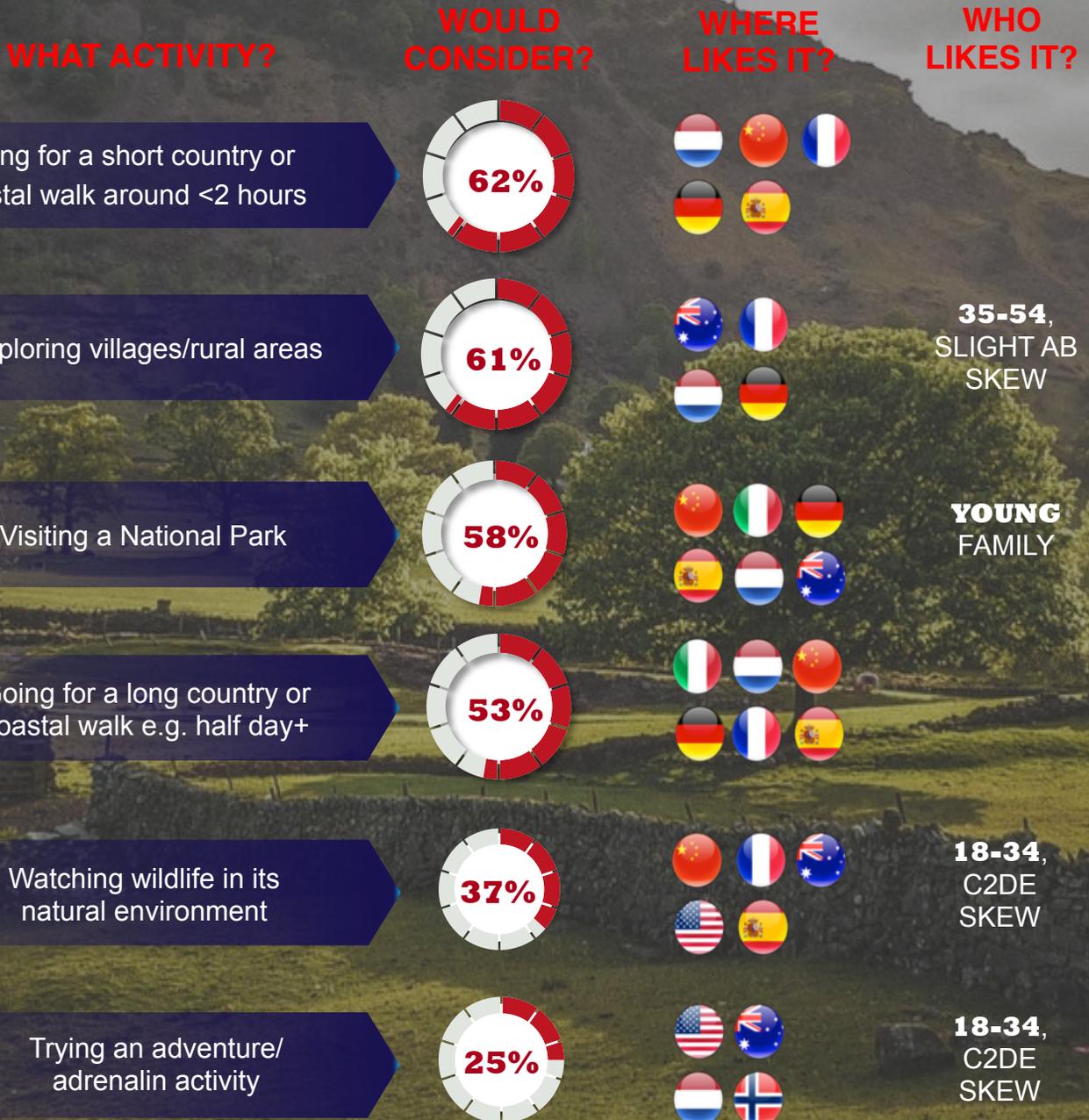
RESOURCES

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 Behaviour<sup>1</sup>



1. QQ7. 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

## Where Likes It?



The data shows relatively low current exposure to the countryside, compared to towns and cities.

## Future International Visitor Interest<sup>2</sup>



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 Likes It?



But interest in visiting countryside and rural areas is much higher at 59%, and is stronger in high volume potential markets like the US and China. 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.

# Where Can I Find Out More?



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## 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.

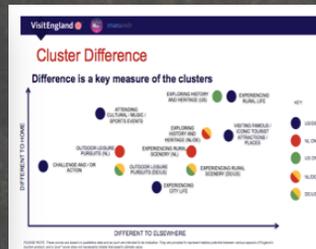
And in the qualitative report, you'll find much more on differences, relative strengths and challenges for each of the clusters, and ideas behind turning the everyday into something extraordinary.



BY ACTIVITY



BY MARKET



STRENGTHS & CHALLENGES



**Optimising the Discover England Fund Application through Insight**

One Minute To Midnight/Maru

14<sup>th</sup> March 2017

- How many international visitors would consider this theme or activity?
- What markets are the 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>