



Discover England Fund
LONDON & MAJOR CITIES 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.

Research conducted by:



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.

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 & Opportunities for Major Cities in England



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Everyday city life is culture

As with most things for the international visitor, the appeal of cities is often the perspective they offer on the people of a country.

The highest profile character for many English cities is music or football, but that appeal can often be based on the insight they provide on the everyday

They often appeal because of the insight they provide into English people, so an 'everyday' game or concert can be just as compelling.

“Quite often when I visit somewhere I'll take some time and catch a typical commuter train with people, just stay on to the end of the line and watch people living their everyday lives.” - International visitor from the US

“I think just of the people living there, and the infrastructure also tells me something about their culture. And the pubs! It goes with the scenery, and the streets. People seem classily dressed, taken care of themselves.” - International visitor from the Netherlands

“History and heritage. What made Great Britain great, how it came to be. I'd like to see their parliament because it's very different to ours” - International visitor from Germany

People can feel all global capitals are similar, but other cities can offer contrast

Many visitors feel that London is another modern Western city (so it doesn't particularly appeal to their curiosity), but it is a must do for most at least once in their life.

These cities have potential to motivate a visit because of (not in spite of), their difference to the part of England everyone's seen; London

“I want a city that's not big and bustling, very different to London. I want an authentic Britain, not globalization. Not American chain stores. Real British life.” - International visitor from the US

“I come from a big city, all big cities are all similar. You don't learn anything about the country in a city” - International visitor from the US

“Birmingham, Newcastle, Liverpool, Manchester. The harbours. Liverpool - I think are much more representative of England than London, London's really an individual case, as far as culture goes.” - International visitor from the Netherlands

Football & music lends identity to the bigger cities

The highest profile character for most English cities is music or football, so of course these are themes which can be embraced.

Whilst there's appeal for those visitors who are music and sport enthusiasts, it's personal interest and rarely the city itself that drives visitation, so growth of that appeal is therefore limited by the musical/sporting assets available.

“European sports - it's something different I've never experienced so that's the draw to that. Like curling at the Olympics with an Oompah band, throwing down beer for 3 hours straight!” - International visitor from the US

“It's nice, but it's like this - football, Manchester, Liverpool, I think of Coronation Street a VERY long time ago! But we wouldn't pick those places. If we're in London and it's 2 hours to Liverpool it would be an option, but it's not a primary place to go.” - International visitor from the Netherlands

“Manchester - it's known for the 80s/90s - I'm a big fan of Joy Division and they're from Manchester, I think there's some sort of museum there. I do that kind of trip, I went to the Kraftwerk hotel in Berlin for instance.” - International visitor from the Netherlands

“I want to go to Liverpool and Manchester ... I have heard good things and they are not London” - International visitor from Germany



71% of international visitors will consider 'Experiencing City Life' on their visit, so even with the caveats noted on this page, English cities are relatively popular parts of English holidays



At 50%, visiting contemporary cultural attraction has mid-level appeal, but for those who are interested there's very strong crossover with 'Visiting World Famous/Iconic Places' (90%) - the range of activities on offer in English cities is highly complementary

Opportunities & Challenges for London & Major Cities in England



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OPPORTUNITIES

London can be essential as ‘the reference point’ for the quirky things on offer elsewhere

London is undoubtedly top of the list for most, at least for their first English visit. For repeat visits though, beyond London is often felt to be more intriguing and visitors can suspect it offers more of a glimpse of ‘Real England’.

We know visitors are interested in how other destinations and activities contrast to London, but London could still be a part of those other experiences.

Thinking about how other destinations and experiences complement or contrast with ‘the London experience’ can help make London essential – not just for the once-in-a-lifetime attractions, but as an ongoing cultural experience and comparison.

“I’ve been to London before so I don’t have to go round standing in the crowds to get yet another picture of Buckingham Palace” – International visitor from the US

“The children should know London, experience it and their customs and see things like Big Ben and the Big Wheel. The boat races, it’s good for them to know, the cabs.” – International visitor from the Netherlands

The contrast of old and new is one of the things that can make London and other major English cities feel special

Although modern English cities are sometimes thought to be unrepresentative, visitors can still find them interesting because of the diverse mix of contemporary and ‘traditional’ English heritage.

It’s not just the contrast to other parts of England that makes them special, sometimes it’s the juxtaposition and contrast in themselves that’s makes these cities appealing.

“In London there’s a great mixture of modern and old that they’ve got it right, done it very well, a contrast of old and new.” – International visitor from Germany

CHALLENGES

Dining and drinking is appealing, but doesn’t necessarily feel English

Although the perception is that food in England is significantly better than it has historically been perceived by the international visitor, a local food culture is hard for visitors to identify in many large Western cities, and England is much the same.

“If you want to go to London it’s never not interesting. But I wouldn’t go to England for dining and drinking. Once you’ve planned the trip then you search for dining and drinking.” – International visitor from the Netherlands

“London has lots of money so there’s a big food culture, but it has very little to do with England.” – International visitor from the Netherlands

The larger modern cities & London can struggle to differentiate themselves on the world stage

As with most things for the international visitor, the appeal of cities is often the perspective they offer on the people of a country. But for the international visitor there’s not a great deal of international identity for most English cities

“I come from a big city, all big cities are all similar. You don’t learn anything about the country in a city” – International visitor from the US

“These are images that every big city could talk about. It’s a harbour, but it’s not typically British is it?” – International visitor from the Netherlands

Top Activities For London/Major Cities

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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



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?



London, whether Solus or part of a multi city/town visit, dominates the past behaviour of international visitors to England.

Future International Visitor Interest²



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 while London also dominates future interest for international visitors, more modern cities outside of London have the lowest interest of any cluster. Awareness of specific examples of music and sport associations is generally low, however, and so the potential to increase visitation may lie in promotion of these (and other) features as part of a story of what makes these places relevant to the story of England.

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.

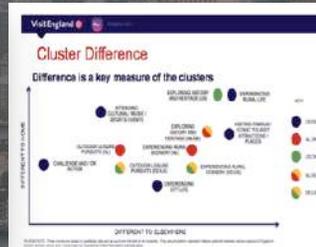
And in the qualitative report, you'll find much more on differences, relative strengths and challenges for each of the clusters, and ideas behind turning the everyday into something extraordinary.



BY ACTIVITY



BY MARKET



STRENGTHS & CHALLENGES



Optimising the Discover England Fund Application through Insight

One Minute To Midnight/Maru
14th March 2017

maru/edr

- 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

maru/edr

- 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>