



**Discover England Fund**  
**SMALL CITIES & TOWNS 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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## 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: Small Cities & Towns



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## The Preservation Of Everyday England Is Part Of What Makes Smaller Cities And Towns Special

For many, the wide range of 'everyday' well-preserved features are the jewel in the crown of England.

However, they can stray into lifelessness without the human stories - audiences are just as fascinated by the reflection on the life and attitudes of people now.

And it's especially interesting and motivating to US audiences – Germany and the Netherlands less impressed by 'raw age' and more likely to compare with other historic assets in Europe.

“ Historic cities – every country and city has its own historic stuff. Britain doesn't have exclusive rights to it, but Britain has well preserved examples, not just ruins where it used to be. – International visitor from Germany

“ The pub experience – beer at the right temperature is a huge thing. Oxford's Rose and Crown, Steak and kidney pie! Just local people hanging out, the keg seems wooden and old. – International visitor from the US

“ The bigger cities are being modernised, turned their back on the downturn. The market towns I think of more as small towns, they've retained their heritage. – International visitor from Germany

## Smaller Cities And Towns Have A Challenge In Establishing An Identity For International Visitors

The exception is where they are defined by a standout piece of heritage, or television.

Drawing direct comparison with London and the differences to the 'typical' England experience can be very compelling to the international visitor.

“ They got famous for good food like Yorkshire pudding, very particular regional specialities and very typical villages there. It's worth going for that. York's supposed to be very picturesque but I have no idea what's there. – International visitor from Germany

“ Shakespeare came from there didn't he? But actually I think it's actually a gloomy industrial nasty place. Coventry, I think the Germans flattened Coventry didn't they? – International visitor from Germany

## The Appeal Of Regional Lower-profile Assets, Once Exposed, Can Be High

The challenge is that for an audience who initially see and London as synonymous with England and visit there in great numbers, it's tempting to tell people there's more like that further afield.

More of the same, however, isn't very motivating for them and doesn't define the identity of individual regions and cities.

If the product has potential if it can demonstrate an identity

“ I'd like to combine, like Norwich and London. – International visitor from the Netherlands

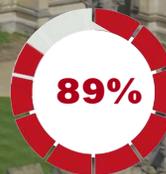
“ I really want to go to Yorkshire ... I saw James Herriot, that Vet .. It looks so beautiful there – International visitor from Germany

“ It's got to be regional local, flea markets, normal grocery markets, or a garden or flower show. For a flower show I'd go with all my photography equipment. Not ascot, people all dressed up, I want to go to somewhere I don't have to dress up. Only if it's regional. – International visitor from Germany

“ 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



While larger cities often have an advantage iconic, world class sites, smaller cities have many castles, palaces, and historic houses – which appeals to 77% of international visitors



89% of those interested in seeing a castle, palace, or historic house are also interested in visiting an historic monument – typically a strength of smaller, less modernised cities and towns

# 2 Things You Might Not Expect About International Visitors And Small Cities & Towns



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## London Versus Is An Essential Concept For Positioning Smaller Towns And Cities

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

This clear contrast is the subconscious appeal for visitors – how they appraise other places, how they define them, how things become WOM-worthy when they return home.

However, because of low awareness, it helps to spell out the contrasts very clearly. For the international visitors, often the greatest engagement and intrigue comes from things which provide a contrast, not an extension.

“ I'll take the train up North, I like to live how people there live. It's more welcoming, homely, there'll be a local with a story. – International visitor from the US

“ We wanted to go to Bath and a little village – just great! Every night we went back to the same pub – they said we must really like it! The culture of the pub I like very much. A little old fashioned. It's not hip/modern/boutique-style hot, - it's a little old fashioned but charming for it to remain like this. – International visitor from the Netherlands

“ I know London... I want to see somewhere else ... somewhere in real England. – International visitor from Germany

“ London's really an individual case, as far as culture goes – International visitor from the Netherlands

## The Idea Of A 'Market Town' Is Generic – International Visitors Need A Deeper Story To Find Smaller Towns Appealing

While usually not motivating enough for a standalone visit, if their ability to give a contrasting experience of England to London is highlighted, these cities may help grow visitor spend from existing visitors outside of London.

“ Market towns – every city in the Netherlands has a market. What are you talking about?” – International visitor from the Netherlands

“ The bigger cities are being modernised, turned their back on the downturn. The market towns I think of more as small towns, they've retained their heritage. – International visitor from Germany

“ Locals not jaded by tourists, not fed up. Family owned businesses, just asking the owners what to do.” – International visitor from the US

# Top Activities For Small Cities & Towns



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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

## WHAT ACTIVITY?

## WOULD CONSIDER?

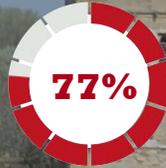
## WHERE LIKES IT?

## WHO LIKES IT?

Visiting world famous/  
iconic places



Visiting a Castle, Palace, or  
Historic House

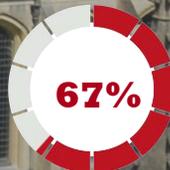


**SLIGHT** ABC1 &  
55+ SKEW

Trying local food &  
drink



Visiting a museum



Experiencing an event  
associated with local traditions



Visiting a Film, TV, or  
Literature attraction



**18-34,**  
C2DE SKEW

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?



Only 14% of international visitors to England in this sample visited the non-London towns or cities, but some of the biggest international visitor markets are particularly interested in them, representing high potential for growth.

## 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 appeal of non-London towns & cities is very high (especially for Historic cities, which tap into one of the key things that appeals to international visitors about England as a holiday destination). 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.

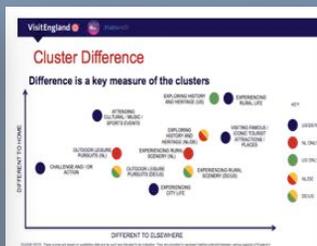
And in the qualitative report, you'll find much more on differences, relative strengths and challenges for each of the clusters, and ideas behind turning the everyday into something extraordinary.



BY ACTIVITY



BY MARKET



STRENGTHS & CHALLENGES

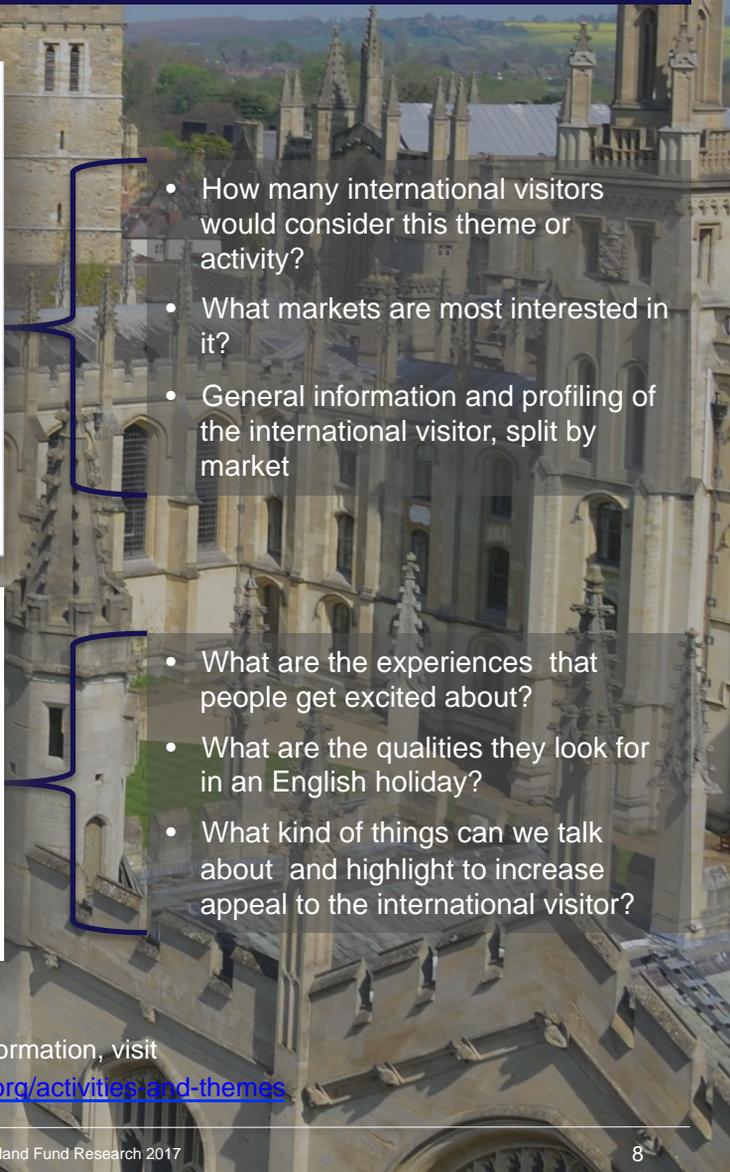


**Optimising the Discover England Fund Application through Insight**

One Minute To Midnight/Maru  
14<sup>th</sup> March 2017

**Discover England Fund Visitor Research Qualitative Presentation**

One Minute to Midnight & Maru|edr  
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
- 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>