

Case Studies for the Discover England Fund

Management Summary

November 2016

Report contents

This report is in three parts:

- Introduction to the selection of case studies
- Case studies – Summaries & Transferable Learning
- A matrix showing key themes, by case study

Introduction

The three-year £40 million Discover England Fund announced by Government in 2015 has the objective of ensuring that England stays competitive in the rapidly growing global tourism industry, by offering world-class English tourism products to the right customers at the right time, considering both leisure and business tourism.

Funding is being awarded to external bidders to support product development projects, in two tranches, as follows:

In Year 1 (2016-7), the fund will support 21 smaller scale quick-win projects with a value of up to £250,000.

In Years 2-3 (2017-19), the fund will support a number of larger projects (minimum value of £1Million), with an application process in late 2016/early 2017.

Industry consultations about the scheme suggested that it would be valuable to learn lessons from other examples of product development, whether in the UK or overseas.

VisitEngland (VE) therefore decided to commission a series of case studies, to provide insight about best practice in product development for the tourism industry generally and, more specifically, to guide VE and tourism businesses and organisations in developing concepts and proposals for projects which might receive support from the Discover England Fund.

TEAM Tourism Consulting and EarthCheck were commissioned to work with VE/VB to identify and undertake an initial group of between five and ten directly relevant case studies of product development.

VE indicated that it would like the case studies to include Itineraries, routes, corridors and thematic groupings; and 'joined up product' such as thematic consortia, use of digital/tech solutions, transport-related options such as through-ticketing, destination passes and pricing solutions.

VE required the case studies to be selected to be of maximum relevance to the design and development of proposals for projects to be delivered with support from the Fund in Years 2 and 3, i.e.:

- Of similar scope in terms of initial investment
- Collaborative in nature (multi-destination and/or business and/or transport)
- Public and private sector funded
- Having appeal / marketed to international visitors.

Additional criteria for selection of the case studies were:

- Their likely relevance to the English regions
- The nature and characteristics of the project funding and partnership delivery mix
- Availability of good information about the project on the web, including performance measurement and ROI/impact information availability.

TEAM and EarthCheck identified a 'long list' of 18 potentially relevant projects, which were evaluated against the above criteria. Based on this, VE selected six for the first set of case studies.

The Case Studies: Summaries & Transferable Learning

- Wild Atlantic Way, Ireland – Touring Route
- Vennbahn Cycle Route – Cycling Routes
- St Olav Ways, Norway – Cultural/Walking Routes
- Margaret River Region, Australia – Food and Drink Experiences
- Signature Experiences Programme, Canada – Experience Marketing
- Switzerland Tourism & Partners – Transport-based packaging

Wild Atlantic Way, Ireland

www.wildatlanticway.com

Ireland's tourism development authority, Fáilte Ireland, developed and implemented the Wild Atlantic Way as a large-scale programme to increase substantially the economic contribution of tourism to the Atlantic coast.



The Wild Atlantic Way is Ireland's first long-distance touring route, stretching from Donegal to West Cork. Supported by a substantial programme of infrastructural investment and experiential product development, the project is creating an 'experience brand' designed to achieve greater visibility in target international tourist markets.

Three overarching themes have been identified to guide experience development along the Way:

- Life Shaped by the Atlantic (Culture)
- Where Land Meets the Sea (Landscape and Seascape)
- Connectedness (Personal Renewal, Discovery)

Wild Atlantic Way, Ireland

Key considerations are as follows:

1. The Wild Atlantic Way is an over-arching brand which individual destinations and businesses can use to leverage much greater visibility and clarity of message in the international marketplace.
2. The Way has been devised to present a compelling proposition for international markets - seeking to achieve a level of market impact that individual destinations would be unable to achieve. To this end, there was a need for it to have 'critical mass', in terms of the scale and depth of experiences
3. It was recognised at the outset that only a small proportion of visitors would travel the entire Way on one visit, and that the scale and attractiveness of the overall proposition would enable it to draw people back for one or more repeat visits.
4. There was acceptance that, at least initially, the main visitor markets would experience the Wild Atlantic Way largely through self-drive trips, using the core touring route on existing roads. However, this is supplemented by a wide range of walking, cycling and water-based trails. Loop itineraries, and walking/cycling/water-based options will continue to be developed over the course of the programme.

Wild Atlantic Way: Transferable Learning

- **A Strategic Approach:** The Wild Atlantic Way is the first manifestation of a national initiative (by Fáilte Ireland) to implement an experiential approach to tourism development – the first of three ‘experience brands’
- **Brand/ Proposition Led:** The destination brand was developed with a specific objective to be a unifying proposition for the West Coast.
- **Ownership and Control of the Brand:** Brand guidelines have been established to help businesses and partners understand usage of the Wild Atlantic Way brand. The Wild Atlantic Way is now a registered trademark.
- **A Clear Proposition:** A clearly designated core driving route forms the spine of the Wild Atlantic Way.
- **Strong Leadership:** Strong leadership and financial backing from Fáilte Ireland to drive the project has been essential. A core team of 19.5 FTEs supports program implementation. In addition to a capital investment of circa €12M to date, Fáilte Ireland makes an annual revenue investment of approximately €2M - €3M.
- **Comprehensive Investment Approach:** Establishing the Wild Atlantic Way and bringing it to market has required a comprehensive investment approach covering: capital investment in wayfinding and route development/maintenance, marketing and branding investment, digital platforms, business support, experience development and partnership formation.
- **Experience Development:** It is fundamental to the long term success of the Wild Atlantic Way that the brand promise is backed up by the availability of outstanding experiences on the ground - experiences which reflect the route’s values and attributes. To this end, Fáilte Ireland is currently preparing a series of visitor experience development plans for local areas along the route.
- **Wide Ranging Partnership:** Although it is a national initiative, implementation of the Wild Atlantic Way concept requires active support from a wide range of partners including; environmental, cultural and heritage agencies, local government, business support providers and local communities.
- **Third Party Booking:** Fáilte Ireland has not provided direct online booking solutions, but significant resources have been directed towards making visits to the area easily bookable through third parties – including incorporation of the Way into tour programmes.
- **SME and Community Engagement:** Active engagement by SMEs and whole communities is at the heart of developing memorable, authentic experiences for visitors and is a key objective of the experience development plans being developed at the local level.

Vennbahn Cycling Route, Northern Europe

www.vennbahn.eu/en/vennbahn-cycle-route.com



The Vennbahn Cycle Route is Europe's longest disused railway cycle path, specifically developed as a tourism product exploiting the rail bed and associated infrastructure of tunnels and bridges, the region's scenic beauty and its cultural heritage. The cycle trail stretches 125km from Aachen in Germany, through east Belgium ending in Luxembourg.

Extensive regional cycle networks (Vennbahn Plus) are available with lengths between 30 and 50km and of different degrees of difficulty, passing through unique landscapes and cultures.

Vennbahn Cycling Route, Northern Europe

Transferable Learning

- **Positive Market Trends:** The potential market (domestic and short haul international) for cycling tourism products appears considerable.
- **Catering for the Mainstream:** For the mainstream of touring cyclists (as opposed to dedicated cyclists), attractive scenery and/or heritage and cultural assets are essential to maintain their enjoyment.
- **Cyclist Safety:** Cycling routes need not be completely traffic-free, but where they use public roads, these should have low traffic volumes and ideally, significant stretches should be purpose-designed for cycling.
- **E-bike Opportunities:** Electrically powered 'E-bikes' are increasingly in demand and give confidence to less experienced cyclists, allowing them to tackle longer or more demanding routes.
- **Limited Adoption of Booking Functionality:** Cycling tourism is not a sector that has adopted technology or "bookability" tools as yet, despite the frequent use of social media and apps such as Strava.
- **Integration with Rural Tourism Experiences:** Cycling tourism can be an effective way of developing rural tourism product, if there is an integrated approach to planning.
- **Adoption of Apps:** Apps are favoured by some long distance cycle routes, but not all. Vennbahn has recently launched one; conversely Sustrans have dropped their App. 'La Loire à Vélo' in France has continued to update and develop their app since its launch in 2013 and it is promoted with a QR code from their home page.

St Olav Ways, Scandinavia

<http://pilegrimsleden.no/en/about/om-pilegrimsleden>

The pilgrim ways through Scandinavia are authentic historic routes through Denmark, Sweden and Norway, the remnants of pilgrimage routes leading to the 11th-century Nidaros Cathedral in Trondheim where Norway's patron saint, St Olav lies buried.



The development of these pilgrim paths has been based on historical routes leading through outstanding natural heritage, agricultural landscapes and heritage destinations and attractions. The ways are managed by the publicly funded National Pilgrim Centre in Trondheim. More than 5,000 kms along the recognised routes have been branded with the pilgrim logo.

There are six nominated pilgrim trails, however the principal route is The Gudbrandsdalen Path stretching from Norway's capital, Oslo to Trondheim: 643 km (est. 32 days) of well-marked trail in stunning and varied countryside. A major landmark is Lillehammer, host city of the Olympic winter games in 1994; the Dovre mountain stretch in particular presents a real challenge – there was still snow on the ground in June 2016.

St Olav Ways, Scandinavia

Transferable Learning

- **Key elements:** In developing the route, four key elements were regarded as keys to success: the natural environment, infrastructure, services, and marketing.
- **Local Engagement:** This type of public sector led initiative needs to build strong connections with “grass roots” operators, building trust and enthusiasm.
- **Slow Tourism:** The watchwords that stand out from the St Olav Ways visitors' experiences are: personal, distinctive, authentic, and natural. It is a good example of 'slow tourism'.
- **Matching Assets with the Physical Challenge:** Walkers are not put off by a hard physical challenge, if there are appropriate support services in terms of welcoming accommodation and hospitality.
- **Distinctive Local Cuisine:** Local food is part of the sense of place, and an important strand of rural tourism
- **Meeting the Locals:** Meeting local people makes the St Olav Ways a living cultural experience.
- **Spiritual Niche:** The outstanding cultural and religious heritage is valued as a “spiritual work-out”; the purely religious aspect appeals only to a minority
- **Preference for Mobile-optimised Websites:** Effective mobile friendly websites can be preferable to apps, particularly if there is good mobile network coverage.
- **Digital Mapping Tools:** Effective digital mapping tools should be adopted, including GPX.

Food & Drink Experiences, Margaret River Australia

www.margaretriver.com

The Margaret River region is located on the west coast of Australia approximately 3 hours' drive south of Perth.



The region benefits from being able to offer a variety of products – outstanding natural assets including beaches with world class surf breaks, tall-timber forests and ancient caves, as well as world class culinary offerings. Long recognised as one of Australia's premier wine regions, Margaret River is home to 95 cellar doors and more than 120 wine producers.

Margaret River is an exceptional example of a region which has successfully developed its food and drink experiences into a major visitor proposition – being regarded by many as Australia's premier gourmet region. Rather than being a distinct project, in Margaret River's case, food and drink work is a core element of overall destination management delivery. The area demonstrates excellence in experience development and packaging.

Transferable Learning

- **High Quality Product:** The region offers genuine depth and quality of food and drink experiences, complementing other nature-based experiences.
- **A Signature Event:** The Margaret River Gourmet Escape is a high-profile event that draws people to the region – helping create awareness and a positive image of the region.
- **Timing:** The launch of the Margaret River Gourmet Escape in 2013 has allowed the region to surf the wave of food and drink popularity - enabling the region to benefit from Tourism Australia's national and international marketing investment.
- **Partnership:** The region has been able to fully leverage partnership benefits through ensuring that strategic priorities are aligned. The Tourism Association's memorandum of understanding with the South West Development Corporation is especially illustrative - wine industry sales volumes are incorporated in the project alongside tourism outcomes in assessing RoI.
- **Itineraries & packaging:** The Tourism Association's work on itineraries, interpretative stories and building distribution of tour options has started to add significant value. The Association's consumer website offers a booking solution for over 100 commercially provided tours, but not real-time.
- **Proposition-led:** The adoption of Your Margaret River Region branding across all aspects of tourism in the region, including marketing and signage, provides a common look and feel across products and a consistent regional brand message. There appears to be strong support for the brand from tourism businesses.

Canadian Signature Experiences Collection

http://en.destinationcanada.com/resources-industry/canadian_signature_experiences

The Canadian Signature Experiences® (CSE) collection is a qualified set of Canadian visitor experiences that best exemplify Canada's tourism brand. The role of the collection is to capture the attention and imagination of consumers of Discover Canada's three target market segments and motivate them to travel to and within Canada.



The collection is based on unique and exceptional travel experiences that are engaging and immersive and provide the opportunity for the target segments to discover, learn and enjoy Canada in ways that are personally relevant and aligned with their motivations to travel.

The experiences are submitted by businesses and organisations involved in tourism. To qualify, the experience must meet a range of mandatory criteria, appeal to one or more key market segments and be aligned with the country's brand and unique selling propositions.

Originally launched and managed exclusively by Destination Canada in 2011, the collection has grown from 48 experiences to almost 200 and is now co-managed with the provincial and territorial marketing organisations, which undertake the initial assessment. The cost of running the programme is essentially staff time.

Transferable Learning

- **Brand-aligned Innovation:** The collection has encouraged brand aligned innovation within industry and has promoted the philosophical shift away from selling products and activities toward developing and delivering unique and memorable experiences at a relatively limited cost – essentially the cost of time to administer and oversee the programme. These experiences now differentiate Canada in the marketplace, help create the 'movie' of Canada in the mind of the traveller and are the basis of more meaningful destination experiences. The programme showcases a method for identifying high quality experience to align with destination and market development priorities.
- **Sales Tool:** From the travel trade's perspective, the CSE collection is a valuable sales tool and is used extensively by receptive tour operators in building itineraries. Indeed, in many ways, it is the activities of the travel trade and media that are now driving the programme. The challenge is to ensure that these activities associate the member badge with the qualified experience rather than with the company or business.

Destination Packaging, Switzerland

<https://switzerlandtravelcentre.ch/en/about-us/>

This case study reviews a set of interrelated booking and packaging initiatives of Switzerland Tourism (ST), and its partners, accessible through its website, MySwitzerland.com. ST, the national marketing and sales organisation for Switzerland has developed a simple and easy-to-use platform for bookings via the Switzerland Travel Centre (STC), a separate vacation specialist company established by ST. The STC is responsible for the e-commerce aspect of the joint web platform - i.e. selling services and processing bookings (fulfilment). ST provides the destination content that stimulates and guides customers to use the STC booking service.



ST is also one of the founders of Swiss Travel System Ltd (STS), along with the Swiss Federal Railways (SBB) and public transport providers throughout the country. STS's mission is the joint international marketing of Switzerland's comprehensive public transport network, including STS' range of travel tickets and passes, as well as the promotion of cross-border travel to neighbouring countries.

Traditionally, the creation and sales of 'packages' was the preserve of the tour operator, who had direct access to airline seats via the GDSs and inventory allocations or free sale arrangements from accommodation and car rental suppliers, enabling instant booking via travel agents or, to a lesser extent, tour operators direct. However technology has played a leading role in changing this traditional model and enabling the approach adopted by ST.

Transferable Learning

- **An integrated approach to booking and marketing:** The integrated online booking system on Switzerland Tourism website (MySwitzerland.com) allows users to book hotels, apartments and holiday rentals, trains or combined public transport and leisure offers (art and museums, fun, sports and recovery). STS's aim was to pool and purposefully direct marketing efforts outside Switzerland in order to promote Swiss public transport services abroad.
- **Destination Packaging is possible but developing new solutions may not be the best option:** Examples in Spain, France and Belgium as well as the Swiss experience demonstrate that via effective partnerships between transport providers and the tourism sector, it is possible to develop booking solutions which provide integrated experience and travel itineraries for visitors. However, high cost and global competition will make this a very challenging undertaking.

Key themes by case study

	Wild Atlantic Way	Vennbahn cycling route	St Olav Ways	Margaret River - food & drink	Canadian Signature Experiences	Switzerland destination packaging
Strategic approach	✓	✓	✓		✓	✓
Market focus	✓	✓	✓	✓	✓	
Brand proposition led	✓		✓	✓	✓	
Guidance on wider use of brand identity	✓				✓	
A clear proposition	✓	✓	✓	✓	✓	
Strong leadership	✓	✓	✓	✓	✓	✓
Investment plan	✓	✓	✓			✓
Experience development	✓		✓	✓	✓	
Itineraries & packaging	✓	✓	✓	✓	✓	✓
Wide ranging partnership	✓	✓	✓	✓	✓	✓
Booking arrangements	✓			✓		✓
Business and community engagement	✓	✓	✓	✓	✓	
Meeting the Locals	✓		✓			
Distinctive local cuisine			✓	✓		
Integration with rural tourism	✓	✓	✓	✓		
Safety		✓	✓			
Apps and mobile web	✓	✓	✓			
Physical challenge		✓	✓			
Spiritual dimension			✓			
Signature event				✓		



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