VisitEngland
The role of product in driving regional spread

A summary of related insights from some past studies

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Chapter 1 - The Why and a Caveat
VisitBritain and VisitEngland are tasked with attracting inbound tourists to the UK. One of the major challenges is to encourage inbound tourists from around the world to set their sights beyond the tourist destination powerhouse that is London.

Currently the organisations are in the process of undertaking a product development initiative through the Discover England fund.

Over the last few years VisitBritain has conducted a number of published research studies into the global traveller and triggers for greater regional spread. One Minute to Midnight has been lucky enough, under our previous brand Olive Insight, to successfully deliver these projects across both mature and emerging markets.

The nature of these programmes was very much to explore the levers and barriers to getting people beyond London. They were not product development / innovation specific pieces. However, in the course of the research a number of useful insights were forthcoming that can now help with the innovation and product development process. This document is a summary of the insights of the programme pertaining to product, i.e. looking at the results through a different lens.

In addition, we will include some insights gained from other related programmes around Britain's cultural offering, some of which were also carried out by One Minute to Midnight.

The key caveat for anyone reading this document is that none of these programmes was a dedicated product development and innovation piece. As such the ideas here are based on One Minute to Midnight's interpretative and analytical skills gained from many years working in travel and tourism across all the markets in question, using data that was designed to fulfil other and more diverse knowledge needs. Clearly, further research would be needed to develop more bespoke insights about opportunities for product development.

Finally, the programmes were of a specific time. Much has happened since 2013 which may have impacted attitudes to travel in Britain, most recently the EU referendum, and this should be borne in mind when reading this document.

We hope that you find the information here useful. If you have any questions please do not hesitate to contact us here on weallarrived@oneminutetomidnight.life
Chapter 2 - The What
The insight provided in this document is largely based on two research programmes conducted for VisitBritain between 2013 and 2014. The programmes were tasked with exploring the levers and barriers to getting beyond London across the globe. They were not dedicated to innovation / product although within the course of the research, the conversations and questionnaires did cover product related issues.

**Mature markets beyond London exploration**

The initial project was with the more mature markets of Norway, France, US and Germany. It was conducted in early 2013 and was a two phase project:

**Phase 1** was a qualitative approach, which used 2 focus groups in each of US and France and 20 one to one telephone depth interviews in each of Norway and Germany to create some hypotheses to test.

**Phase 2** was a quantitative online questionnaire of 20 minutes in length covering 840 respondents across the 4 markets that validated the hypotheses.

Across both phases the sample was evenly split between those who had been only to London and those that had been beyond London. All were in the market for international leisure travel.

Most of the coverage of this report will focus on this study.

**Emerging markets beyond London exploration**

This project followed on from the one above and was conducted in late 2013 and early 2014. It covered GCC (KSA and UAE), India and Brazil. It followed a similar process and coverage

**Phase 1** was a qualitative exploration of the emerging markets. 12 face-to-face depth interviews were conducted with international leisure travellers in all the markets in question and 5 interviews with travel agents in GCC and Brazil.

**Phase 2** was a quantitative validation process where 910 online interviews were conducted across the markets in question.

The sample for this programme was slightly different to the first project, being evenly split between those who had been to Britain before and those who had not.

Although the focus in the rest of this report will be on the mature markets, we will make mention of some of the insights coming through from the emerging markets.

In addition, some supplementary nuggets of knowledge will be introduced from other research studies into Britain's cultural offering.
Chapter 3 - Overview
The time to think product

As we embarked on our journey across the world to understand the global inbound traveller’s orientation to Britain, it became abundantly clear that for many who had not been beyond London, the desire and indeed the knowledge simply wasn’t there to venture outside the capital.

Most associations of the inbound and potential inbound traveller around Britain’s offer were stereotypes, and associated very directly with iconic London, from the famous buildings to red buses, black taxis etc.

Imagery, ideas and constructs with regards to Britain beyond London were very limited across many markets, amongst both those who had only been to London (i.e. not beyond) and those who had not been to Britain at all.

The chart below indicates that barely one in five people in the mature markets (US, Germany, France and Norway) who had only been to London felt they knew much about what is beyond across a range of product themes.

This is the reality. The rest of the country is not perceived as particularly relevant to many in the rest of the world. The only exception we could find in our work (across a relatively sophisticated sample from New York to Mumbai and Paris to Shanghai) is Scotland which does exist in many people’s minds - but almost as a completely separate destination to Britain.

This was most extreme in the emerging markets. Those who had not been to Britain had very little idea of what might lie beyond London’s borders. It is almost as if the ‘product construct’ for a travel destination for beyond London simply does not exist (beyond Scotland) for many in Brazil, India and the GCC.
Having said this, not all minds are closed, and many could see themselves going beyond London in the next ten years as the chart below from the mature market report demonstrates.

As we can see, more people envisage themselves going on a 'London plus' holiday (over 50%) than just travelling beyond (less than 40%). We will come back to this point later.

In all then, we can see that knowledge levels of the offer beyond London among those that have not been are low, and yet there is at least some interest in doing this.

In our qualitative conversations with those that had not been, we heard them grappling with questions about what “beyond London” might be:

- What could they see?
- What could they do?
- What could they feel?
- What travel motives (our words to their meaning) could they meet by going beyond?

Currently many do not have the cognitive ammunition, the constructs if you will, to answer these questions. They need 'products' to give shape and form to expectations.

Our research demonstrated that competitor markets have these constructs, such as the vineyards of France, the three classic cities of Italy, the South of France, Orlando, the California Coast, the Black Forest, Provence, Tuscany etc.

People understand what these products stand for in terms of the values they align with, how they can access them, and what they will do and feel there. For the future, Britain will need to create these constructs if more people are to be encouraged to explore the country outside the capital.

Below we will expand on some ideas that emerged from these pieces of research to start to give some direction to product development and innovation initiatives.
Chapter 4 - Three Challenges for Product
Overview

In this section we will discuss in detail some specific opportunities for product. However, firstly, we want to introduce three challenges to thinking about product for Britain - one a little esoteric, that we have alluded to above, and two more practical.

• The most compelling product works on the “4 Dimensions of the Human Existence.”
• The travel agent is becoming less central to travellers, and consequently product needs to live beyond the industry and exist in the cultural consciousness
• We can’t ignore London

The most compelling product works on the 4 dimensions of human existence

Across all the work we have conducted over several years with the international tourist, whether this be young fashionistas in Riyadh and Shanghai or older tourers from Germany or the US, most are looking for that individual experience, that hidden gem, something that is unique to themselves, perhaps something they have created, customised or even tailor-made. This is true for both mature and emerging markets. Work we have done in some markets with agents has supported this.

As cited in the original Beyond London research in the mature markets of 2013, and now actioned in the current communications campaign (#OMGB), the inbound tourist is seeking memorable experiences and moments that they can ideally share with loved ones and brag about back home.

Inbound travellers talk a lot about meeting the people, seeing the country, experiencing the culture. People are seeking the freedom to have their own experiences, and to feel a level of creativity and curation that proves they are doing something different to others.

Of course, the reality is something different, in that what most actually seek and do are fairly typical activities and few are truly adventurous and genuinely want to get totally off the beaten track - and if they are the more adventurous type of traveller, they are more likely to get beyond London on their own without a strong construct and concept.

Having said this, the learning for product development and innovation for VisitBritain is this essence of seeing the real country, meeting the real people, seeing the real life.

Products that can provide the sense of an individual and authentic experience will be motivating across markets and in particular in more mature and developed markets.

“I want to see the villages, meet the people, see those little houses” French Older, London Solus

The watch-out here is that people aren’t talking about the real Britain but an augmented version of Britain and British life.

Previously we were asked by VisitBritain to consider the motivating power of destination vs experience. The evidence was a little cloudy but the leaning of most people was more to a certain type of holiday experience vs. an actual destination. However, as we look back at the initial analysis and move forward, we suggest that this insight can be reframed with regards to product, and the paradigm can be shifted. Actually, experience and destination are not independent of one another which is why the question doesn’t have a simple answer. A destination is experiential and more often than not an experience is destination specific.
If we think in terms of products these can, as we'll see, be destination based, and at the very least must be a physical entity. Yet we also need to think about the emotional experiences they deliver and most importantly the human values of travel they are fulfilling.

It is crucial to bear in mind that the most compelling products conjure up not just the physical place or attraction, but create an expectation of what the visitor will feel and do through the product. As an example, consider Paris, one of the world's most defined travel products. It is not just its physical structures that create the product construct, but the things that can be done there ("sitting in a bistro watching the world go by" to quote a young German), the sense of awe and specialness, of luxury and pandering and ultimately the human value provided, that of connection with one another. The same can be said for other established products, such as a three cities tour of Italy or Californian fly-drive.

So a travel product is much more than just a physical asset.

One of our young French respondents sums it up nicely.

"Look, it's all well and good telling me about castles but I can see these here in France or over in Germany, they have some nice ones, and to be honest these mean a lot more to me. Tell me what I will do in this castle, what I will feel there...no?" France, Younger

Or from an older Italian from the Culture Programme of 2015...

"The best moments touch you on a deeply human level. It is the times you feel, the times you do something that no one else has done, the times that make you think wow I am different than I was before this moment" Italy, Older (from Culture Programme 2015).

These sentiments were echoed the world over on our journeys and highlight a core requirement of product. Products are not merely things but at their best deliver something deeply human, whether this is an experience or a story to tell. A great product is something evocative, something that can be shared, and something that can be enjoyed together with others. When thinking product we must think how it connects with the visitors:

• Physically: what it is, where it is, how will I get there and what will I actually do there?
• Emotionally: how will I and my travelling companions feel there, which emotions, will I bond with other people?
• Cognitively: what will it make me think, what will I understand as a consequence, will I learn anything?
• Human Values: what value is being connected with here specifically with regards to travel, what ultimately is the benefit or reward? This is not a need state being fulfilled, but rather it is more profound – the question of how ultimately will I be benefiting, and how this is helping to deliver to me through travel what I hold to be important to the way that I lead my life

Only by developing product with these dimensions in mind can we truly captivate and engage our audience, and ultimately provide those transformative experiences alluded to by the Italian traveller above.
The diminishing role of the travel agent

This chart is from the 2013 mature markets quantitative survey.

There may well be some underclaim in these figures, particularly around use of on-line travel agents, as not all travellers understand that the OTA websites they use are indeed travel agents. Irrespective of this, it is clear that when booking trips to Britain, a great many people are sourcing them independently. The findings were a little less extreme in emerging markets where travel agents do hold more influence but even here, particularly amongst the young, there is increasing confidence in independent planning.

The implication of this is that the products that need to be delivered have to live in the broader cultural consciousness. They need to be ideas that are easily disseminated in the digital domain. They need to live independently of the traditional travel trade. Ideally they need to be able to be shared and communicated simply through Facebook, Instagram, Weibo and Twitter. They need to be encapsulated in photos, videos and short text particularly when targeting the younger generation.

“There is this wood in Ireland. I follow this travel photographer on Instagram and he takes these amazing photo I want to so go there”

Indian, Younger
We can’t ignore London

If we look at the current situation for those who have only been to London, we can see that if they are to consider product beyond, it needs to be ‘attachable’, accessible and orientated from London. If we look at the type of itinerary that they would consider, a large majority of those who have not been beyond London previously would want to include London as part of their trip.

The picture is somewhat different for those who have been beyond London. In the next ten years 71% would consider a “London plus” holiday; 68% a Beyond London only trip, and only 58% a London only. In other words, once they have travelled outside the capital, they are likely to include it again either as part of a London plus or as a Beyond only trip. Indeed they expect that they are more likely to go only to regional UK than they are to go only to London.

This all needs to be borne in mind as we develop product. For those that have not previously been beyond, it may not need an overt “London plus” label, but its access to and from London needs to be obvious and easily enabled. Those that have already been beyond are likely to do so again and are more likely to consider a Beyond London only trip.

Summary

To summarise this section, three overriding themes need to be considered as we innovate and develop product:

- The most powerful product is a holistic concept that isn't just a thing but is associated with clear behaviours and emotions and ultimately connects on a much deeper level. If we can develop product along these lines we are likely to generate something very powerful, enabling people to fulfil their life principles through travel.
- The ideas we develop need to exist in the cultural consciousness – we can’t rely on the traditional travel trade to inform people
- Finally, for now at least, many of the products do need to link with London, i.e. they need to be London plus product, unless we target those who have already been beyond the capital.

We will now review some specific themes with regards to product development.
Chapter 5 - Destinations
Across the series of research programmes we did not look at specific products or even product areas. The work was conducted on a much more macro level and around various levers and barriers to getting beyond London. Having said this, potential product themes did emerge, largely around the thematic pillars and destinations as well as identifying levers, barriers and challenges to each.

Let's start with destinations…

Destinations that can frame products

Britain does not have a strongly defined regional offer in the minds of the inbound tourist when compared to our key competitors, who often have strong geographical constructs such as Provence, Tuscany, Southern Italy, the South of France, and California etc. The regions and destinations of Britain, and in particular England, simply aren't particularly well embedded in inbound tourists’ minds as potential places to visit.

Here’s a Chinese Businessman talking about a product of one of our competitors...

“Ah I really want to go to Provence and see those lavender fields. They are so famous. I will take my daughter there and we will connect”

Chinese, Older

Such comments are very rare for British regional products. The only real exception to this is Scotland, which has considerable salience across the globe in itself and its individual products, e.g. Edinburgh, the Festival, whisky tours etc.

As far as England (and Wales) are concerned the regions have very little global resonance, though there are minor geographic nuances.

Norwegians, and younger Germans, can find the Northern cities of Manchester, Liverpool and Newcastle motivating. Here, they find the culture, the nightlife, the shopping and the Premiership football of interest. This is generally centred on what we might call the British way of life. It is not high culture but merely the British (English) way of living, which they might see as freer and less conformist than their own.

"I really like England. It is so different from here. They care less what they are seen to do. They are freer. It is more fun" Norwegian, Younger

But on the whole, the Northern cities are of little appeal to Americans and French

"Why would I go to Manchester? Isn't it like Detroit?" New Yorker, Older

Beyond this, there does seem to be some idea of ‘Southern rolling hills’ with picture postcard villages. This is less a specific geographical location, and more an amorphous idea. The French are most likely to attribute this to the ‘South Coast region’.

Finally, the only other region that seems to get any mention at all is Cornwall, with many older Germans being enthusiasts. But even Cornwall barely registered as an idea elsewhere.

This was similarly the case in the emerging markets, with India as the only exception, where there was some interest in the Northern cities.

So what can we conclude from this? In short it will not be of any particular benefit if we simply package a product as a region or destination, as these mean nothing to most of the world with a few minor exceptions. If we are to take a regional/destination approach to product, we have to link together places, what people might do there, how they might feel and what will the ultimate benefit be to them. At the moment the English regions and destinations simply don’t have enough meaning.

The exception in the work we carried out was the Northern cities for some Norwegians and Germans. Where these do have appeal, it is because there was a clear understanding of what people will do there (shop, football, drink, music); how they will feel (warm, freer, alive); what they will think (the different way of life of the English, progressive and modern) and the ultimate values they are expressing and connecting with (creativity, adventure, hedonism).
Chapter 6- Product Themes for Consideration
Beyond a specific destination, how else might we look at product? What else from the research we conducted can stimulate our thinking and enable VisitEngland to make the best decisions on priorities for product development?

The macro themes that emerge with regards to Britain were:

- Countryside (and rural towns)
- Major cities (not London)
- Coast
- Historical sites
- ‘Culture and people’

If we begin with looking at this quantitatively, it is clear that a great many people from mature markets who had only been to London had significant interest in seeing a whole range of potential product areas.

QC3 Please tells us how interested you are in each of the following places
Base: All markets: Solus London N=420
And similarly many of those in the mature markets who had been beyond thought that these aspects had been contributing reasons why they had travelled outside London.

To what extent do you agree with these reasons why you travelled outside of London?
Agree top 2 box

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<td>81%</td>
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<tr>
<td>Diverse regions which make for interesting holiday</td>
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<td>Unique places to stay outside of London</td>
<td>75%</td>
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QE1 - Why did you visit beyond London?
Base: All markets: Beyond London N=420

Let’s take these themes one at a time.

**Countryside**

On first inspection, the countryside appears to be highly motivating for people. Around 40% of London only visitors were extremely interested in "the countryside" and 78% who had gone beyond London felt that the countryside was a reason to go beyond London. So - the concept itself is indeed of interest and was motivating to some. However, when we deep dived qualitatively there was a sense that mere countryside was not enough for many who had not been. It needed to provide something more specific. An American summed it up nicely...

“So I would travel 5,000 miles to have a picnic. Erm why would I do that?”
*New York, Older*

There needs to be something to go and see and do, some physical product to be experienced, emotions to be felt. The mere idea of countryside, which although many can easily agree might be nice to go and see, needs to have something more for people to connect with it more strongly. Here, some of things that were mentioned by both those who had visited and those that hadn't include the "villages with the small houses" or "interesting country towns."

Beyond this, within "countryside" there is a sense of nature and this did seem to be of considerable appeal to highly urbanised markets in the likes of GCC and Indian Tier 1 Cities, as well as Italy and Germany, both markets that have a strong appreciation of nature and travel.
Cities beyond London

Next, we will consider major cities (other than London). These are also interesting - up to a point. Only around 1/3 of those who had not been beyond London from the mature markets were interested in visiting other cities, although this was higher in Norway and Germany than US and France. Again overseas visitors need a reason, a physical thing to see, but more importantly something to do or feel in the cities. In Norway and Germany some consumers have an understanding of some of the Northern cities, with things like music tours of Liverpool and Manchester suggested in the qualitative exploration, giving a more concrete view of the experience – but even here, this would not be a trip to everyone’s taste.

In the emerging markets there was little interest in other cities beyond London with exception of some appeal of Liverpool to Brazilians for the Beatles, and Manchester to Indians.

People and Culture

The British people and culture at the time of research (2013) were attractive to many. Almost half (49%) of those who had not been beyond London could be persuaded by these themes. One caveat to this is that the Olympics were a far more recent memory in 2013 than they are now, and that other socio-political challenges including Brexit have happened since then, and may have impacted perceptions.

Separately, in 2014-2015 two studies were conducted specifically looking at culture, one with mature and one with emerging markets, and these provide further insight about cultural products. These emphasise that when thinking about culture, it is vital to go beyond visiting mere buildings and sites and really position products around activities that fulfil deeper needs. Products that suggest an immersion in the British culture and accessing 'real' Britain can offer this.

History and Heritage

History and heritage were two further themes that resonate with potential visitors. Over half say they could be persuaded to go beyond London to visit historical sites while 81% of those who had gone beyond London cite history as a reason for travelling. However, the qualitative exploration again suggests that it is not enough to talk about history / heritage by itself.

Britain has a strong association with history, but so do our European neighbours – especially Italy, but also for example France and Spain, while in some markets such as Brazil, Britain’s history actually has little relevance as they have much closer cultural connections elsewhere in Europe.

The qualitative discussions around history/heritage sites and destinations often moved again to a wider consideration of the specifics of the experience. Again, even in this area which is a relative strength for the UK, it is clear that there always needs to be a strong reason to visit - something that defines the history and heritage beyond somewhere being an 'old' place to go and see. A Brazilian we met in Sao Paulo summed it up nicely:

"I can get castles in Portugal and Spain and I know why they are important. England of course its Old, its European, but a castle is just a castle...once you have seen a few, well..." Older, Brazilian
So how to bring history and heritage to life? The cultural work conducted in 2015 highlighted the importance of stories, legends and myths to a country's cultural identity. As such, a consideration for developing strong history / heritage type products would be to wrap them in the rich fabric of the country's stories, whether they be based on reality or myths / legends or even our fictional IPs (Harry Potter, James Bond et al) to create a compelling sense of meaning to a place.

**Coast**

The British coast does not seem to resonate with many inbound tourists. Among those who have been only to London from mature markets, barely 20% were very interested in it and amongst those that had been it seemed to be a less powerful reason than some of the other British ‘assets’. Qualitatively it really received very little mention beyond Cornwall for older Germans and the South Coast a little for France. There was very little real knowledge of the coastal offer and its attractiveness was further inhibited by concerns about the British weather.

> *I can't imagine being on a beach England with their grey weather. It will be freezing*

*France, Older beyond London*

Beyond these macro themes for product, several specific areas emerged as having potential

- Food
- Unusual accommodation
- Sports
- Outdoor Activities / Adventure Sports

**Food**

Attitudes towards, and perceptions of British food and drink are mixed. High/afternoon teas are notably popular particularly amongst Americans, Chinese and Indians, with some interest in (warm) beer, music, pubs and of course fish and chips. At the same time, there is still a fair amount of resistance towards British food particularly in the US, though some have been pleasantly surprised by the actual experience. In general there is a belief that it is better than it once was, but the offering is still not compelling versus Italy or France. In short, to create food type products will not be universally credible but for those a little closer to understanding modern Britain they will appeal (for example, a Scottish whisky tour is a notable example of a compelling product).

**Accommodation**

Slightly clouded by London experiences, some inbound visitors feel hotels in England are not good value, being very expensive compared to the same level of hotels in other similar destinations. On the one hand, only 10% of people specifically say that accommodation being too expensive is a barrier to going outside London. However, almost a quarter feel that it is too expensive to travel outside of London in general which may well be influenced by perceived accommodation costs.

The qualitative research highlighted a potential way of limiting the barrier and indeed creating motivation through accommodation. In the era of Airbnb, glamping, and other alternative accommodation types, the options available to visitors are wider than ever before, and many in the qualitative explorations talked about wanting to experience different style accommodation from the
traditional hotels. The idea of staying in castles emerged for example as something that was felt to be a different experience full of romance and legend.

"I'd love the idea of staying in a castle. It really brings history to life."
France, Older

Castles or indeed any other form of interesting or different accommodation can add value to experiences and consequently have a real role creating a differentiated and exciting product.

**Sports**

Across international populations as a whole, there is limited interest in watching sports in general - but of course there is an audience out there, particularly for the Premier League (which attracts some interest across most markets.)

Where sports does seem to create real interest though is if it can be packaged as an insight into English culture, a cultural product as much as a specific sporting one. Indeed those who have been to football games in England talk of the atmosphere being like no other.

If there is a way to incorporate sport into a 'cultural' style product as opposed to an event in itself it potentially will attract broader interest.

**Outdoor Activities / Adventure Sports**

Outdoor activities / adventure sports do seem to be of niche appeal, and are not readily associated with Britain versus other markets. Having said this, we did have the occasional person in our qualitative research who had been on these types of trips in the UK, and had enjoyed them.

However, in qualitative interviews when respondents were shown images of 'wilderness' type landscapes, they were found to be appealing. Indeed quantitatively in France and Germany the British wilderness product could prove attractive with around 80% citing it as a reason to get beyond London and just over 70% of those who had not been beyond London thinking it could be a potential reason to do this. These figures were much lower in the US and Norway where other reasons to go beyond seem to resonate more.

However, when we explored these ideas of wilderness and adventure more in the qualitative research, we often found resistance, as there was the expectation that such locations would be extremely hard to access. If there is a way to wrap up ease of access of outdoor activity and wilderness there could certainly be some potential in Germany and France. This was supported in India and to some extent in the GCC where the idea of getting out into nature is an intrinsic part of culture.
Summary

The above represent some of the key themes that have emerged as ways of thinking about framing product and product development.

The most important insight to bear in mind when developing product outside the capital is that more often than not, inbound travellers have very little knowledge of what product might entail beyond London.

This means that when developing / enabling ideas to come to life, it will be vital to think not just about the physical aspect of the product, but also what it will ultimately deliver to the inbound tourist in terms of emotions and the needs it fulfils.
Chapter 7
Individual Market Perspectives
In this section we will look at product through a slightly different lens - that of individual markets. As with all the findings contained within this report these themes are lifted from research programmes that had far broader briefs than looking at product, but which can nonetheless provide a market specific view of opportunities for inbound market growth.

To begin with, we will consider the four mature markets of:

- France
- Germany
- Norway
- US

### France

The two key themes that emerged from the French market were the beautiful countryside, and British culture both new and old.

Around 80% of those who had not been beyond London felt that the British countryside might persuade them, and 76% of those who had been beyond had gone because of the countryside. Within the qualitative work the French spoke of bucolic rolling fields and pretty country villages as things that they found romantic and attractive.

In addition, 90% of those who had not been beyond the capital would be persuaded to do so by specific cultural sites. The French more than most seemed to be motivated by two different dimensions: History/ Heritage (82% of those been beyond had gone to see the history) and the more contemporary culture, although the latter was far more related to London.

### Germany

Germans were very landscape and countryside driven, with 87% of those who had travelled outside London having done so because of the countryside. In addition they seemed to be the most attracted by the coastline, with a similarly high proportion of those who had been outside the capital giving this as a reason for doing so, while over 80% of solus London visitors see both countryside and coastline as motivations for seeing more of the UK. It is also of note that Germans are the nation most comfortable with driving in Britain, so potential road trip / touring programmes could appeal.

Germans also seem to be very open to British cities (along with the Norwegians) with 87% of solus London visitors citing them as a reason to visit beyond London, pointing to real potential to develop city style products. This was particularly notable for younger Germans.
Norway

Of all the markets, the Norwegians seemed to be the most enthused by British people. The scores for the warmth and hospitality of the British people were relatively higher vs. other assets of the offer in the UK compared to other destinations. Those who had travelled outside London ranked the British people as the third most important reason to do this, and solus London visitors ranked this fourth out of 23 reasons to go beyond London.

Qualitatively they were the most informed and knowledgeable about the regions, particularly the North, reflecting connectivity between Scandinavia and this region.

They also viewed the British cities as more attractive than either the American or the French markets.

Even so, the prime motivators for Norwegian solus London visitors were beautiful landscapes and coastline, with history ranked highly for those that had travelled outside the capital, along with countryside.

In all, it seems that the Norwegians have the broadest appreciation and motivation for the offer across people and culture (e.g. shopping, cities, nightlife, and football) and landscapes (countryside and coast and a little history).

US

As with most markets, in the US the countryside seems to strike a chord in motivating trips beyond London with 88% of those who had not been feeling the beautiful landscape could persuade them, and 84% of those who had travelled beyond citing this as a reason for their trip.

However, of all the markets the history of Britain seemed to be the most important motivator for Americans coming in at 87% for those that had been beyond London, and 80% those who hadn't.

These scores are very high, but it is important to remember that the qualitative work conducted suggested we need to do more than just talk about “countryside” or “history” - Americans in particular wanted to understand much more of the specific experience if they were to travel beyond London.
As mentioned above, we also conducted a second stage of this research programme in India, GCC and Brazil. Below we provide some of the highlights from these markets.

**India**

Within this group of emerging markets, Indians seem to have the most rounded appreciation of Britain. They have an interest in train trips, in exploring the beautiful countryside for the nature and the towns and villages, and Northern cities to find out more about the British and their way of life.

As with all the emerging markets they do tend to see these experiences as add-ons to a trip to London.

**GCC**

Among those from the Gulf there seemed to be some interest in nature/countryside style products provided they could get reassurances that there are the necessary levels of luxury / branded accommodation present. They would also want specific reassurances about safety beyond London, and also about the availability of Halal food.

There does seem a niche group of young males from the GCC who could be interested in adventure and camping style products.

**Brazil**

Brazilians seem to have some interest in the cities, and also the people and culture. They have a lot of interest in the modern day monarchy, and also history and heritage, but we would need to work harder around the latter than is perhaps the case in other markets as Brazilians have stronger cultural connections with the history and heritage of other European markets. Britain's music and shopping can also appeal to this market.
Chapter 8 - Conclusions
Conclusions

England has some challenges ahead in shaping products to meet the needs of the international visitor

Currently there is little awareness of the offer beyond London in terms of what the visitor will see, feel or do or what ultimate “human values” it will deliver on. London dominates people’s perceptions of the English offer at a time when travel agents are being used less and so are less able to influence potential visitors.

As a consequence it is vital to develop more product to give potential inbound visitors frames of reference for their visit. The most compelling product will work on the four dimensions of existence, behaviours, feelings, thinking and the individual’s values system - ultimately what the product will deliver to the person taking it up.

If product is based on a geographical region / destination, it needs to be constructed around both the physical dimensions – what it is, where it is (in relation to London) and how to get there – but also the emotional dimensions.

With respect to different types of product some specific learnings emerge:

• Countryside is a strong proposition, but needs to offer a real sense of what people will experience when they are there
• Coastal needs a lot of work to conceptualise – not an easy association with the UK
• Northern cities are market specific in their appeal (some traction in Germany and Norway, less so France and US)
• People and culture can be of interest but again need a very tangible product to be motivating
• History and heritage is a very powerful space but needs to be made compelling and not generic and boring

Finally, we need to think carefully about what product works with which market and which audience within this, as there are considerable differences around the world.

One final point, which we would like to make again here, is that all the findings outlined in this report are time specific and were initially generated a couple of years ago. There have been substantial geopolitical shifts in recent years and indeed weeks, from the Brexit referendum to security challenges across the globe. This means that all the information needs to be considered in the context of when it was collected, and further exploration would be necessary to understand if, or how, attitudes have shifted since this research was originally undertaken.
Appendix

The 4 Dimensions of Being Human
Each of the 4 Dimensions has a role to play in our interactions with the world and with brands

The industry either:
- Takes one or two dimensions at best
- Rarely joins them up
- Over focuses on culture without understanding impact on the human
- 4 Dimensions or meaning in terms of value