Heritage and culture is an important element when choosing a holiday abroad - along with other aspects

Other elements are as key when choosing where to go

8/10 state the following as being important in their decision:

- Have a relaxing time
- Lots of things to see and do
- Famous places, buildings & attractions
- Friendly welcome from the people who live there
What people look for from heritage and culture on holiday

People look for heritage and culture to promise and provide a distinct, different experience from their home life.

**Emotional impact**
- Moved, inspired
- Astonished, amazed
- Awed, intrigued
- Feel welcomed

**Different experiences**
- Spiritually enriched
- Intellectually nourished
- Surprised, stretched
- Sense of discovering new places & things

**Immersion**
- Share with the ‘natives’
- Not just be a spectator
- Genuine, authentic experiences

“To feel it’s genuine and I’m welcome as a person. I can relax and go where locals go”
(Germany Visitor)

“You feel there’s nothing sexy that’s going to happen in England. Whereas if you go to Buenos Aires you can tango under a full moon in fishnet stockings”
(US Distant Considerer)

“I can have culture in America, I can have culture anywhere. What I really want to see is the unique, varied part that makes it different to everywhere else. . .what makes somewhere distinct”
(USA Serious Considerer)

“Even if it’s having a beer and a drink for two minutes then I feel I’ve been immersed”
(France Considerer)
People want to absorb H&C through a variety of holiday experiences alongside specific H&C attractions

- Local markets: 82%
- Local food and drink: 81%
- Places of natural beauty: 78%
- Coastal towns: 72%
- Gardens and parks: 67%
- Castles: 68%
- Interesting architecture: 69%
- Learn about a country’s history: 70%

But the experience needs to be authentic & genuine - particularly for those who feel H&C is very important when choosing a holiday abroad
Britain’s competitive positioning highlights key areas on which we need to focus and improve.

GB Ranking (out of 7)

1. Historic Buildings - 3rd
2. Famous places - 3rd
3. Art galleries/museums - 4th
4. Relaxing time - 7th
5. Lots to see & do - 5th
6. Friendly welcome - 6th
7. But less well on emotive distinctive/immersive promise

Statistical analysis also noted that addressing these three weaknesses would have a strong positive impact on GB consideration.

NB: all rated in top 4 re. importance of a holiday.

Therefore key perceptions to address.
To enhance tourism, we need to quench a thirst for information

People want additional information on what there is to see and do and how to go about it

60% - 70% agree they would be more likely to consider a GB holiday if more aware of

“I don’t want to just be at a castle for two hours then be stranded”
(France Distant Considerer)

“London you’d do in four days not ten. It’s ticking off one thing then another, in and out of the underground, eat something and then off you’d go again”
(Germany Serious Considerer)

“I see the same old pictures...I want to hear about Wales, Scotland, haunted castles, whisky trails, nature... but you never hear about them”
(Germany Serious Considerer)
Visitbritain.com and Lovewall.com help engage and inspire

- Suggests lots of options, choice; directional ‘chunks’
  - Top 10 Royal attractions
  - Shakespeare’s England
  - Pre-buy travel tickets

- Easy access to bundled ‘worlds’ of ideas; unique
  - Interactive ‘blog style’ nature
  - Personalising ‘Suitcase’
MARCOMs need to inspire, be emotive and create desire:

- Unexpected things I can do
- Immersive experiences - emotionally not just practically
- Genuine, authentic and distinctively / identifiably British
- Empathy - so one can transpose self into the moment
- Variety - from ‘being active’ to just relaxing / enjoying / having fun

And avoid:
- Stock book / photo shot (false)
- Isolated / insular moment- no promise of other opportunities
- Nondescript / generic
Examples of more engaging VisitBritain imagery

Must ensure context to bring possibilities to life
### MARKET SUMMARY:

<table>
<thead>
<tr>
<th>Key H&amp;C competitors</th>
<th>Key needs</th>
<th>GB strengths</th>
<th>GB weaknesses</th>
<th>Ideal holiday descriptors</th>
<th>What to leverage in MARCOMs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>Relaxing time, Lots to see and do</td>
<td>Historic buildings</td>
<td>Relaxing time, Lots to see and do</td>
<td>Welcoming, authentic, discovery</td>
<td>Itineraries and ideas of what to see and do, details on travel around the country to see new places. Mainly London and Scotland</td>
</tr>
<tr>
<td>Spain</td>
<td>Friendly welcome, Historic buildings, Famous places</td>
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<td>Friendly welcome, (Food &amp; drink, different culture)</td>
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<tr>
<td>USA</td>
<td>Relaxing time, Lots to see and do, Famous places, Friendly welcome</td>
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<td><strong>FRANCE</strong></td>
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<tr>
<td>Italy</td>
<td>Relaxing time, Lots to see and do</td>
<td>Historic buildings</td>
<td>Relaxing time, Friendly welcome, (Food and drink, different culture, new places away from the crowds)</td>
<td>Welcoming, authentic, discovery, beautiful, friendly, relaxing and fun but different or traditional</td>
<td>Itineraries and ideas of what to see and do, details on travel around the country to see new places. Particularly Scotland as well as coastal areas</td>
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<td>Ireland</td>
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<td>Spain</td>
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<td><strong>GERMANY</strong></td>
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<tr>
<td>Italy</td>
<td>Relaxing time, Lots to see and do</td>
<td>Historic buildings, Famous places</td>
<td></td>
<td></td>
<td>Itineraries, and ideas of what to see and do, details on travel around the country to see new places. London, Scotland and coastal areas</td>
</tr>
<tr>
<td>(France, Ireland)</td>
<td>Famous places, Romantic</td>
<td>Famous places</td>
<td>Friendly welcome, Lots to see and do</td>
<td>Authentic, beautiful, discovery, friendly, welcoming, lots to see and do but also relaxing and educational</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>Lots to see and do, Famous places, Historic buildings, Relaxing time, Friendly welcome</td>
<td>Famous places</td>
<td></td>
<td></td>
<td>Some interest in free galleries and museums but not a key need</td>
</tr>
</tbody>
</table>
Conclusions

1) H&C needs to be ‘wrapped’ with other key drivers identified to increase visitors

2) Britain performs well on tangible, rational deliverables but less well on emotive distinctive/imersive promise

3) All markets see relaxing and having lots to see and do as being very important

4) All see ideal holiday as being welcoming and authentic/genuine

5) All acknowledge the role of itineraries and information on easy/cheap travel

6) All show interest in and desire to know more about places beyond London
Therefore MARCOMs needs to...

**Quench visitors’ thirst for information:**
Show how visitors can enjoy a number of different experiences on holiday

**Inform re. practical challenges:**
Illustrate and educate

**Humanise and be emotive:**
Portray Britain’s H&C as fun, exciting, authentic, distinctive immersive experiences
Thank you