

Discover England Fund Visitor Research Qualitative Presentation

One Minute to Midnight & Maru/edr
March 2017



What was this research?

- As part of the Discover England Fund program, Visit England has commissioned international quantitative and qualitative research with visitors to help understand what appeals to them about England as a destination, and what activities and experiences they want to do and have.
- This project explored qualitative feedback on the appeal of England, its key assets, and generic activity clusters as per the Mangrove DEF Framework.





Sample and method

3 international markets and in-depth interviews gave a good balance of breadth and depth.

- Markets included in this research were the US (New York), Germany (Dusseldorf & Hamburg), and the Netherlands (Amsterdam), 12 x 1hr in-depth interviews per markets.
- Sample was recruited against the 6 Mangrove DEF Framework International Visitor Segments – Young Active Explorers, Cultural Adventurers, Lifestyle Travellers, Outdoors Enthusiasts, Mature Experience Seekers, and Conservative Retirees.



All Respondents:

Open to travelling to the England & Beyond London in the next 5 years

May have already visited England (according to age)

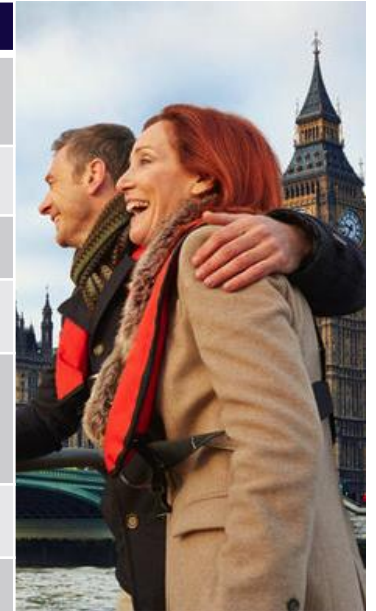
Aged 18+ according to relevant Segment

Were a decision-maker / key role in planning of holiday trips taken

US ONLY had travelled outside US/Canada/Mexico/Caribbean in the past 3 years & DE/NL had travelled outside their country in the past 3 years

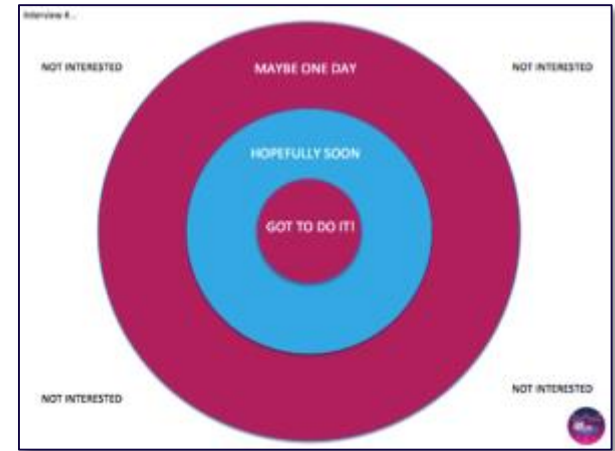
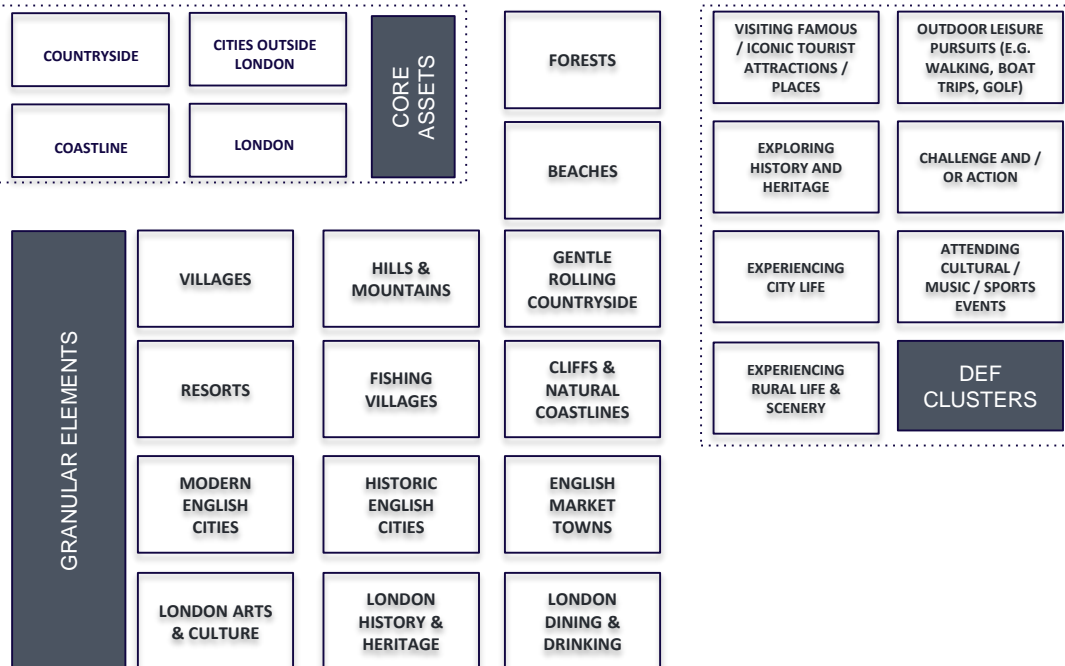
Mix SEG and age according to Segment Type

Local nationals



Stimulus materials 1/2

A range of stimulus materials encouraged specific but open discussions:



MAPPING BOARD



Stimulus materials 2/2

Visual stimulus was then introduced after initial associations and discussions:

CITIES OUTSIDE LONDON



COUNTRYSIDE



LONDON



COAST





Part 1 – The International Visitor

Section Outline:

- 
- 1 A taste of the Mangrove DEF audiences in their own words.
 - 2 A variety of audiences united by common objectives.
 - 3 The importance of the Difference in a Holiday.



The Visitor Segments: In their own words

YOUNG ACTIVE EXPLORERS

I like visiting other cultures and people living differently to the way I live.

– YAE, NL

*It's more for the culture for me. How do they live, talk to staff, eat what they eat. **More about learning, responsible tourism**, not a catered view – always trying to seek out the more authentic.* – YAE, US

CULTURAL ADVENTURERS

I like to see highlights of a city or town, but then go on to other places people usually don't. – CA, NL

*I want to go to Denmark next weekend to have a really great meal and just to **see how another culture lives**, albeit close to home* - CA, DE

LIFESTYLE TRAVELLERS

I can do a little touristy, and not totally off the beaten track – like it to be a little organised. In Asia I go for places that feel a little safer, able to catch a bus and not have to wait a day to get back. – LT, NL

*The English stylistically know how to dress, carry themselves, they're inherently bred! **Polo matches and the way life is, and for me as someone curious about that it's fun.** And I love the accent too!* – LT, US

OUTDOOR ENTHUSIASTS

I'm not the beach type, but I HAD to go to Blackpool, one of their famous beaches... - OE, NL

*I love going walking in the **Mountains in Austria and coming across some small villages*** - OE, DE

*Challenging activities in the UK, I'd be reluctant to do it because I know the weather. I like to do it in good weather, when I'm on vacation I like to **enjoy myself!***– OE, US

MATURE EXPERIENCE SEEKERS

*I've done a lot of vacations you know, I'm **looking for something a bit more lasting*** - MES US

Next trip I want to learn to do some Italian cooking - MES, DE

CONSERVATIVE RETIREES

I like to camp, to travel in nature, a feeling of freedom. But going to a city is nice too. – CR, NL

*My intention is to do **active sightseeing but to relax too**, I don't want to be driven around Europe like the Asians do* - CR, DE



The Visitor Segments: Assumptions & Surprises

YOUNG ACTIVE EXPLORERS

What we'd expect:

Like to try lots of different things and quite excitable

What we might not expect:

Still appreciate the quintessential gentle side of England

CULTURAL ADVENTURERS

What we'd expect:

The most interested in people and culture

What we might not expect:

Can find people and culture in anything – even things which we might assume are too boring for them

LIFESTYLE TRAVELLERS

What we'd expect:

Like a selfie and prone to a bit of pampering

What we might not expect:

Still like to 'mix it up' with more everyday English experiences

OUTDOOR ENTHUSIASTS

What we'd expect:

Like a walk in the countryside and very interested in rural assets

What we might not expect:

Aren't all hikers and hippies – most are still looking for signs of humans in their holidays

MATURE EXPERIENCE SEEKERS

What we'd expect:

Can find a lot that appeals in London to entertain themselves – food and culture

What we might not expect:

More adventurous than their most hated label 'seniors' - might suggest

CONSERVATIVE RETIREES

What we'd expect:

Like to include a bit of traditional sightseeing

What we might not expect:

Are still looking for something distinctive and personal, and can be very active – not all coach trip pensioners

Visitor Audiences United by Destination

These International Visitors are looking for something more than ticking off the 'must-sees' and physical assets of a destination.

4 Key ideas

- Authenticity
- Curiosity in people
- Desire for Novelty
- Separation from the everyday



I do a lot of different vacations – backpacking for 4 weeks, went to Mexico which was very different. I like to see the highlights, but also to see the other side, so if they all go left I go right. The benefit is that it's usually a little more authentic.

- CA, NL

*I'm interested in looking around but I'm more interested in how it **impacts the feel of being English**, I'm not that interested in the look of it.*

- YAE, NL



*I definitely want to go to the pubs and see the pub culture there. I want to get out to the countryside and see the country pub culture there. **I want to be annoyed by the weather there and then go to the coast and be annoyed by the weather there!***

- CA, DE

*It's fun to see the football, looking around thinking 'is **this a riot?! But it's uniquely British** and that's what makes a vacation interesting. – MES, US*





Visitors' Assessment Criteria for holidays

Visitors have 2 key ways of assessing things to see and do on holiday:

'Different To What I Get At Home'

Love to travel in Europe, there's so much to see and do here – many people like to travel the world but I'm not like that, there's so much here.

*I like **Belgium**, it's very near but has a different culture and language, differences to our country.*

- CR, NL

*The coastline, it's a combination of definitely in England and it's rugged coastline and that's very appealing to me. **Absolutely it's unique – can't find that in Holland!***

- CA, NL

*I'm very curious – first of all I want to see the countryside live and not just on the TV. That's what I'd really like because it's such a **contrast to ugly life in Hamburg.***

- OE, DE

*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!*

- OE, US

'Different to Elsewhere'

*Dover, Battle of Hastings – **France or Germany you're not going to see that, or New York or California** either!*

- CA, US

*Cities are fine but **I don't need to see more, I live in a city.** We often go to Berlin and I REALLY don't need to just go somewhere like that again.*

- MES, DE

*There's no new British food, that's pub food isn't it? I don't mind it, but there's **multicultural restaurants all over the world.** In Germany there's typical German food and drink and I like that. Of course there's no British French bread or restaurants – except Jamie Oliver!*

- CA, NL

*Something local, **you can't see anywhere else** – that's what appeals.*

- YAE, NL



So what do International Visitors see in England, and what makes it special?



Part 2 – England and the Motivations to Visit

Section Outline:

- 1 What makes for a powerful cliché of everyday English life
- 2 Why the mundane is far from mundane
- 3 How curiosity motivates the search for difference



Visitor Types and Holiday Themes

These Visitors were usually looking for an English Holiday, not always purely their 'holiday type'

- The segments are a useful reference point for the mindset of England inbound visitors, but of course real people are more complex.
- England attracts a wide range of visitors with different personalities and interests.
- Being a broad church perhaps suggests that, to begin with, thinking about 'what England is' is more useful than 'who they are'

KEY IDEA

A holiday to England is generally motivated by a desire to experience England and its people.

*These little cosy villages, that looks great with the roses climbing up the front, that's great. That lit up cottage at night, campfire romance, in a village like that I'd go to a dark brown wood panelled room in a little guesthouse. In the evening I'd sit in the pub, in the daytime I'd walk around and see it all in half an hour. I'd eat there sleep there and then next day go somewhere else. **Northern people are like northern German people, dour and they don't talk to you, but maybe the barman would.** – CA, DE*

*England trips always start with London, it's a major world city y'know? But outside London is a **rural extension, rural quaint life**. People live differently outside of London, old small towns, you see their lives and how they interact, people going to work. - MES, US*

*I'd rather visit **many gardens in villages** than go to something too touristy even though I know it's unique. – LT, NL*



Experiencing England and English Life



Meeting locals

*I like the **crazy breakfast and the fish and chips and greasy heavy pies and all that**. Going out to eat I have to order it just to find out what it is – LT, NL*

*In England you go on little strolls, really, walking **from one shop to the next**. You can walk forever and ever along the beach, I once did it all the way to Christchurch. – MES, DE*

*The public house **is like a living room**, it's different to other countries. – CA, NL*

*It's the English atmosphere, but what's really **English, you know? It's calm I think** – they exude calm and you don't find that anywhere else. – CR, NL*

*There's this **age old class system**, it's really institutionalised over there, you're born and you die in this class system. – OE, NL*

*The **Islanders they are different** ... I want to go the pub with them and talk... to find out about their lives why they get up in the morning
- CA DE*

*For the **cricket, I don't need to see the highest level, but just more ordinary just to get the feel of ordinary people it's even nicer**. Football in Spain is very nice too, typically Basque. In England it's the newspapers with pages and pages of cricket! – CR,NL*

*We wanted to go to Bath and a little village, so we just Googled for a weekend cheap flight to Luton, then rented a car and went to a great pub and from there we travelled 3 days – 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.** – LT, NL*

*We just laughed and laughed and it was so beautiful. What I really enjoyed, loved, was I looked up all kind of things about King Arthur and Avalon. **So much fun to do the historical background. Not to find out what the fables were but the real stories – England has such wonderful history**. It's a lot different to Germany, they have history interwoven with fables/legends. It's a really interesting country, not like Germany or Austria – OE, NL*

*In a fishing village **I'd just get fish and a coffee** and see how people live there because it's very very different to here. – LT, DE*

*Locals not jaded by tourists, not fed up. **Family owned businesses**, just ask the owners what to do.*

- MES, US Thursday, March 30,

2017

Ordinary England & The Exotic

The mundane is exciting for lots of visitors – in fact it's hard to believe what they can find fascinating in a holiday.

- This fascination with the 'mundane' is an important thing to understand about international visitors – from Young Active Explorers right through to Conservative Retirees
- The best examples reveal something:
 - ...about the character of the **people**
 - ...insight into the **story** of contemporary England
 - ...idiosyncratic and '**bizarre**' to an international outsider

KEY
IDEA

The challenge of this phenomenon lies in presenting the ordinary as something special



*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. – MES, US*



Real England and Real People

Visitors love the authentic English experience, and any opportunity to build it into product or experience should be seized:



Meeting locals



Doing the things locals do



Eating and drinking what locals do

*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.***

- MES, NL

*And we can have disgusting English food , they **deep fry mars bars** urgh ha ha! I want to eat fish and chips – it's alright when you're in England, it's the best thing you can eat there!*

- LT, DE

*In the past I've been to **horseracing, typical English stuff!** My wife likes tea and scones, typical British stuff! I'll also want to know if there are some performances of some of the old bands.*

- CR, NL

*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.*

- CA, US

*London culture can be like a **pub been there for 150 years**, that's interesting as well!*

- CA, NL

***Fish & chips, very posh royal family, picture lots of rustic places to stay, beautiful gardens and tea houses, beautiful country houses** – that's what I want to go and visit those places for!*

- YAE, US

*These are pretty homey pictures, my home is my castle, sturdy is the way I'd describe it. You could **snuggle up to the fire with a port** and read a book.*

- CA, DE

Curiosity & The Picture of Real England

True motivation tends to come from a curiosity about the people, everyday life, and the idiosyncrasies of a country.

- And this curiosity about England relies on one major thing:

**KEY
IDEA**

D I F F E R E N C E is what makes people and habits on holiday feel novel and interesting

*Every country of course has its own culture, people habits and routines. England isn't the only place you can do these things, for me this holiday would apply to every country, other countries and places. **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. – CR, NL*

*Just the way they talk is so funny, I don't know if you've been but the people you talk to have character – **women with tassles on her bedroom slippers, big curlers, sitting out on a bench in the sun in her front garden, they're very much in their own little world, you have these very idiosyncratic people, they're individuals.** There's humour for me in conversations and their outlook. – OE, NL*

*What I like about England is the mix of the **familiar, and the different.** – MES, US*

Just a Funny Story?

Perhaps a frivolous news story reveals something interesting about the international visitor...



'They bounced on my trampoline'

BBC Sign in News Sport Weather iPlayer TV Radio

NEWS

Home UK World Business Politics Tech Science Health Education Entertainment

England Regions Oxford

Kidlington Chinese tourists attracted by 'quiet houses'

1 November 2016 Oxford [Share](#)

Samantha Anderson said the sightseers were seen in people's front gardens.

JANIS HARWOOD

Chinese tourists are descending on an English village in search of "the true

Motivations to Visit: Summary

MOTIVATION – A holiday to England is generally motivated by a desire to experience England and its people

THE CHALLENGE – How to present the ordinary as something special

THE TRICK– Encouraging curiosity about England relies on highlighting the differences to what they have at home and in their everyday lives



So how do we bring this version of England and it's people to life with products, tangible assets and experiences?



...and how do we think our different audiences see the core English product?



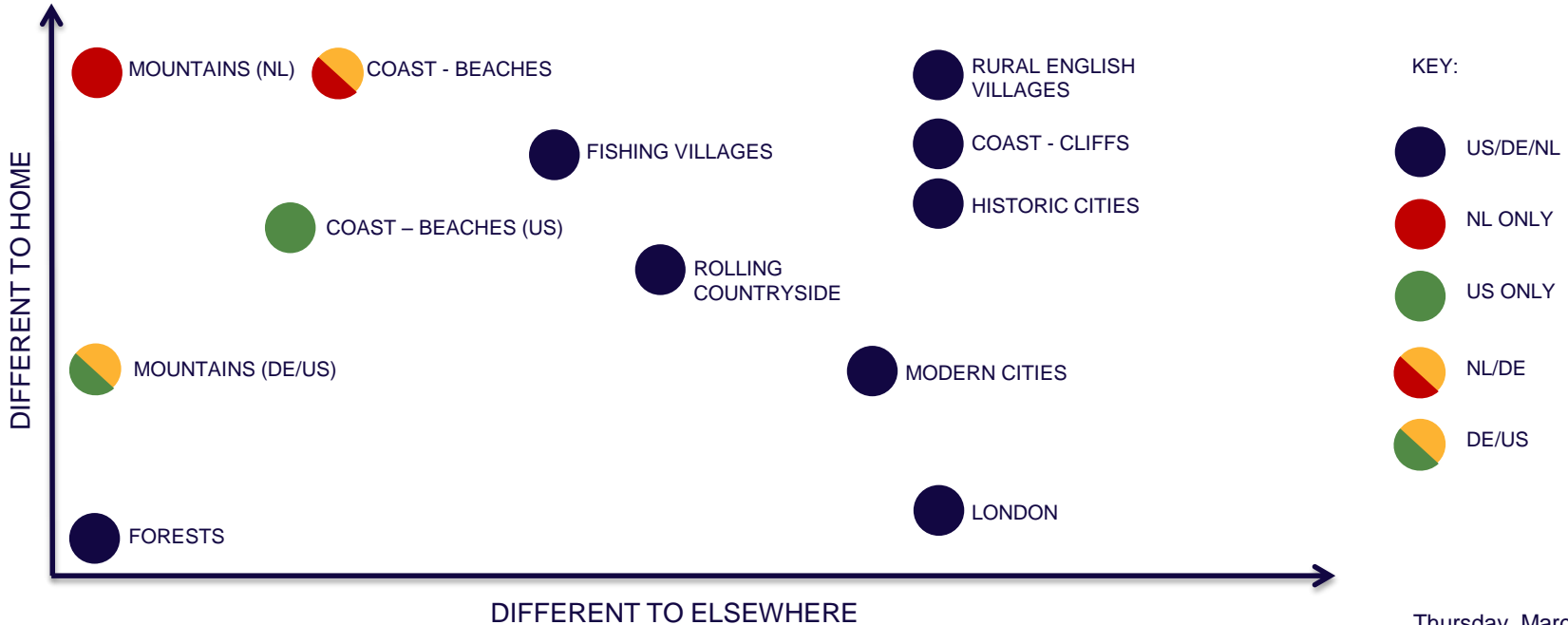
Part 3 – Core and Granular Assets as Motivators

Section Outline:

- 1 A broad overview of what feels different about England.
- 2 Key ideas for measuring the potential of England's assets.
- 3 For London, Cities Outside London, the Countryside, and the Coast:
 - i Basic themes in Visitor Perceptions
 - ii Further Detail & Asset Potential
- 4 A qualitative summary of asset performance and potential

Asset Difference

Visitors get most excited about the truly different



PLEASE NOTE: These scores are based on qualitative data and as such are intended to be indicative. They are provided to represent relative potential between various aspects of England's tourism product, and a 'poor' score does not necessarily dictate that asset's ultimate value.

Further Criteria for Visitor Impact

KEY IDEA

- *'Difference' is important for understanding assets, but **Penetration, Consumption, and Frequency** help us to assess their true potential.*
- *To evaluate an asset we need to look at its potential across all these parameters*

Penetration

Some have potential for **Penetration** – visitors might not be aware that England has it but believe it could do it well

Others help grow **Consumption** – visitors can see it adding depth to a trip, and therefore marginal spend

Consumption

Frequency

And some can contribute to **Frequency** – showing visitors appealing variety that justifies repeat visits

London – Visitor Perceptions

CAN FEEL TOO FAMILIAR

*London, it's like wandering down Kulverstraat, it doesn't leave an impression, I could go to **any major European city**. – OE, NL*

OLD AND NEW

*In London there's a great **mixture of modern and old that they've got it right**, done it very well, contrast of old and new. – LT, DE*

EVERYDAY LIFE IS CULTURE

*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.
-YAE, NL*

London – Overall Image

London is special and obviously a huge draw, but it's not everything – it has flaws.

- 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.
- It's considered full of appealing features and one of a kind assets by visitors, but they don't often describe it as 'authentic England' or 'real English people'



**KEY
IDEA**

It may help to acknowledge that authenticity is not always why people visit London, and think about how other destinations and experiences complement or contrast with 'the London experience'



The 'Chore' of London

When describing the typical tourist icons visited in the capital, Visitors' language is subtle, but revealing.

- London is undoubtedly top of the list for most, at least for their first English visit.
- For repeat visits, beyond London is more intriguing and visitors suspect it offers more of a glimpse of 'Real England'.
- But what's consistent is the way many describe the typical London tourist trail – '*I have to*', '*Couldn't not see it*', '*Will have to*'

*London is on our list because feel they – the kids - **have to** see London. They seem to know it all but I feel I have to teach them something, it's important for them to see where I've been in the past.*
– MES, NL

*I feel that I must see it, but I'll be **glad having done that when it's over!** I think there's something really to see, therefore it's famous, strange enough it's very weird thing – if I'm there I have to go.* – YAE, NL

*You couldn't come and not see them, **but it's not the thing I'm looking forward to** – YAE, DE*

*It's **not a chore, exactly, but it's not a pleasant experience** either – OE, DE*

*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** – MES, US*

**KEY
IDEA**

While visitor numbers are high and intention to visit scores are generally strong for the top tier sights and London in general, in terms of intensity of motivation and expected enjoyment, perhaps the numbers don't tell the whole picture

Cities Outside London - Visitor Perceptions

LOW BUT PRESENT AWARENESS OF INDUSTRIAL HISTORY

*I want to go to Manchester and Liverpool now, I'm interested in their **industrial past** now it's cheap to fly!*
- CA, DE

FOOTBALL DOMINATES THESE CITIES

*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. .*
- MES, NL

MUSIC LENDS IDENTITY TO MINORITY

*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.*
- CA, NL

Cities Outside London

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.

- The cities themselves often struggle for recognition or a distinct character, outside of football and music.
- We know them in part by the nuances of their particular contrasts to London, but to an international Visitor they're often assumed to just be smaller versions of London.
- And promoting their modernity can make them seem like generic European cities.



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. – OE, NL

KEY IDEA

The idea that somewhere might be different to London is intriguing, but do we make enough of this internationally?



Ever wondered where the rivalry comes from?

Liverpool – it's not London

Countryside – Visitor Perceptions

ESSENCE OF ENGLAND

This is the way I picture the countryside. I don't exactly know the golden houses and old houses but it's typical England.

*This too – the wide open countryside, you could go for endless walks and **encounter something new every time. It's surprising, the element of surprise** – not every corner but I'm curious, I'm adventurous, and with a friend could chat for hours and enjoy the surroundings. Wood fireplace, cup of tea, the cosiness and warmth inside these houses, small villages.*

– CA, NL

MORE AUTHENTIC & PERSONAL

*Rural areas are a must, I like it that it's quiet. When it's rural I can see how real people live, in the centre of town they run around blindly past each other, in the countryside it's **easier to get in touch with people. I help people with zimmerframes and then they tell you their life stories!** – MES, DE*

VILLAGES ARE THE STAR

***These images of cottages at bottom are typical English tiny tiny cutesy things, I do like that. These fields, they're not typical, we have fields like that too!** I like open spaces where the air is clean, you can recuperate there. – CR, DE*

Countryside

It is in many ways, the soul of true England in visitors' eyes.

- And as a key part of the appeal of English holidays, the countryside appeals well beyond the outdoor and activity enthusiast audiences.
- But there's an important distinction in terms of motivation to visit – countryside is much less motivating than rural life.



NL audiences found the 'scenery' side of the countryside more appealing than US & DE, but were still motivated more by rural life



*I could imagine actually **going camping or caravanning there**. I want to see villages, rolling countryside for long long walks. – LT, DE*

KEY
IDEA

Everywhere has rural scenery, but only England has rural English life.

Coast – Visitor Perceptions

POOR PERCEPTION OF VISITOR PRODUCT

*The English coast was good in the 50s and 60s but now **it's decaying and rusty**, going downhill fast places. Maybe it's fascinating because it's all morbid and dead.*

- CA, DE

DRAMATIC, DIFFERENT SCENERY

*If you compare it to ours, ours is very flat, the whole coastline is flat like you get in many countries. In the **English coastline it's capricious**, dramatic changes, in very short spaces and spaces of time.*

- CR, NL

CHALLENGING COMPETITIVE SET

*The coastal part, **I've never sat down and thought of England as a coastal place**, which is funny because it's an island! I think of England as being much more cultural and museum-y and Ireland as the untouched beauty place. – MES, US*

Coast

For an island nation, visitors often surprised themselves by how little they associate the coast with typical England.

- While we think of England as a coastal nation, it can often be a surprise to international visitors to see the range of coastal scenery and terrain England has to offer.
- They know it doesn't make sense when they think about it, but parts of the coast come as a huge surprise!



The cliffs and rugged coastline can feel very different to DE and NL audiences, and that makes them very appealing.



I didn't realise they had coasts and cliffs like that in England. I thought we have enough coastline of our own but this is different.

– LT, DE

KEY IDEA

Ireland and Scotland are so strong in visitors' minds, it may prove difficult to fully claim the rugged coast territory from these immediate neighbours without significant effort.

Summary: Topline Strengths

LONDON – Always going to be on people’s lists, but potentially struggles to ignite the emotions

COUNTRYSIDE – The soul of England in International Visitors’ eyes – and all about villages and village life, not hedgerows

COAST – Quaint, but strangely often not on the radar. Cliffs and the village life of fishing villages are where it fits the English identity

CITIES OUTSIDE OF LONDON – Appealing precisely because they’re not London, but their individual characters aren’t cutting through to International Visitors



Village life has universal appeal across markets and segments, and highlight the difference to typical experiences of London enough that they have potential to motivate repeat, extended and new visits



Low awareness and high interest of rugged coastline suggests potential to interest potential visitors in the Netherlands, where this aspect of the coastline is particularly exciting and feels different



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

So how do we express these strengths through real experiences?

...and what would the ideal English visitor product look like?

QUICK BRAINSTORM

'THE IDEAL DAY OUT FOR OUR AUDIENCE/SEGMENT'



Part 4 – How our DEF clusters can motivate Visitors

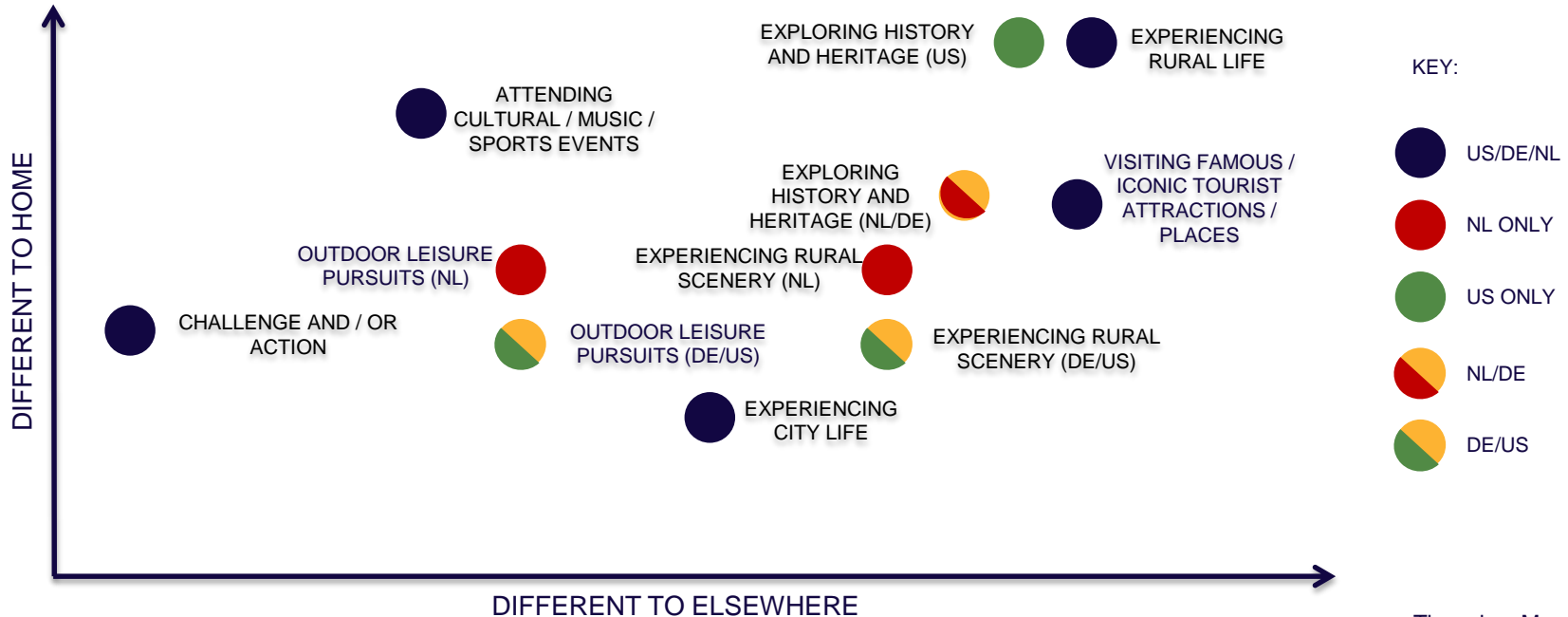


Section Outline:

- 1 A broad overview of how distinctive the DEF clusters feel to Visitors.
- 2 Key quotes from International Visitors on each cluster.
- 3 Detail on International Visitor perceptions of each cluster:
 - i Why it works
 - ii What it may struggle with
 - ii Key idea to take away for this theme

Cluster Difference

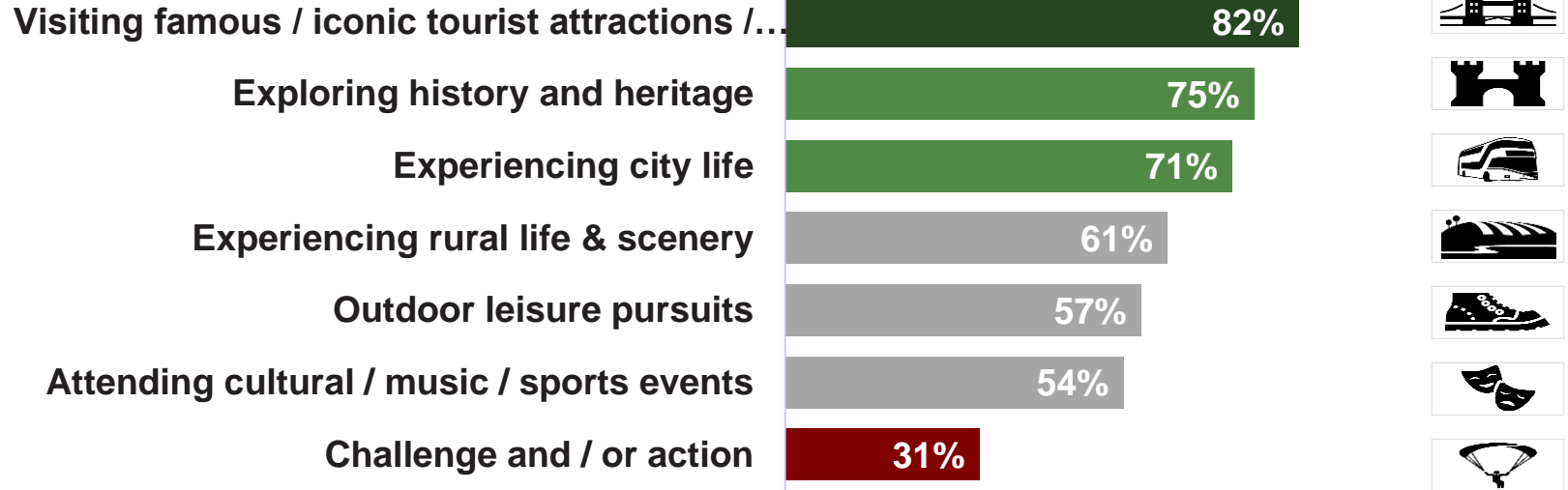
Difference is a key measure of the clusters too



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Quant. Comparison

We saw a similar hierarchy of consideration in the quant., but there's special nuance for City Life and Rural Life & Scenery...



CLUSTERS CONSIDERED FOR ENGLAND- normalised top 2 box scores

QC2_1. How likely or unlikely you would be to consider the following on holiday to England

Base: all respondents (n=15317)



Visiting Famous/Iconic Tourist Attractions/Places



What people say:

*Stonehenge I'd like to see that **but this is a little boring**, but Stonehenge must be impressive – we have the same here though*
- CA, NL

*Not my focus – **standing behind 300 Chinese tourists taking photos is not seeing England for me**. I do think that it's interesting to go, you have to, it tells you a little bit about what's behind the here and now, but it's not my focus.* – YAE, NL

*Stonehenge and Windsor are my favourites of these – **they're authentic**, special places* – CA, NL

***I would visit, but I wouldn't go for it** – you've got to see it once and I have seen it once. We drive past Stonehenge, we stopped and I stepped out, if I'm near and these things fit then I'll pass by and see it again.* – LT, NL

*Stonehenge that's a dream of mine, **I don't even know where it is!*** – CA, DE



Visiting Famous/Iconic Tourist Attractions/Places



What it means:

- They're functionally appealing, but don't add much to the emotion of a visit – they're rarely the anecdote describing the bit of magic someone experienced in England.
- Part of the challenge is that they're 'islands within an island' – they're not tied to a region in visitors' eyes so can often struggle to motivate visitation.
- But simple reassurance that they are reachable, and emphasising regional identity for our visitor icons may encourage people to spend more time nearby, and generally make these icons work harder for English tourism without necessarily increasing on-site visitor numbers.

KEY IDEA

Most people feel they have to (and will) do them, but this broad appeal makes the famous and iconic places feel less special

Experiencing Rural Life & Scenery



What people say:



*It's authentic, old small streets. It's **romantic actually, going back in time**, it's a contrast. We have small villages here sure, but in England I haven't seen them yet. Where I've been in Barcelona it's authentic at times, but doesn't compare to England. It's older, further back in time, it's special! Don't know why I feel like this, it's hard to tell, but it's the unknown! – CA, NL*



*This is nice, very nice, this is what defines England as unique, rolling but not too hilly. The nature changes all the time, it's not like the Alps or the Pyrenees. I don't feel it's similar to Toscana, this is something else. I want to wake up early and **hike the whole day long and then be in the village and have my pint**, and then the next day maybe remaining there, the freshness, the calmness, the wind and the leaves, no traffic and no planes, nothing! – LT, NL*



*This can **only be in Britain** ... only England has stuff like this it is unique, LT, DE*



*I want to go into a local pub and have some bitters, to me it's doing what the locals do, **having some bangers and mash or shepherd's pie, wooden sign with gilded letters** and a crazy name. Not being rejected by the locals! – CR, US*

*You'd see what life used to be like and what life is like now, it's original, and **so different to here, typical rural life that we don't have any more**, so different to us here now. The carefree attitude to life. – LT, DE*

*This **couldn't be anywhere else, you can't find it anywhere else**. This really, you can see it's not France, it's the typical Englishness. – CR, NL*

*I'm interested in looking around but I'm more interested in how it impacts the **feel of being English**, I'm not that interested in the look of it. – CR, NL*

*I like little alleyways and backstreets. These 2 houses lean towards each other, it makes you feel safe, subconscious that it surrounds you, feel safe. **Like my rural holiday I' have lunch there and there I'd go for a little walk**, a little hike the next day, and here drive to next visit and walk down the street, you can go from one picture to the next. – MES, DE*

Experiencing Rural Life & Scenery



What it means:

- Rural life and rural scenery are quite different things to the international visitor.
- Rural life is centered on people, everyday life, and the soul of the country.
- Rural scenery appeals to some, but can seem to be generic fields and hedgerows – which everyone has in their own country.

KEY IDEA

Rural life is the most compelling part of this experience – remember that scenery is usually the backdrop



Particularly motivating for NL where people tend to feel Rural Life is especially rare



Exploring History & Heritage



What people say:

York is an example of this historical city, cycle to York or visit for a day, but the bigger cities like Liverpool or Leeds you'd go maybe for a long weekend but without bicycle. Camping outside of York though, and bicycle or train to York instead. - CR, NL

*This is typical England. **Very typically British, this is culture,** like St Albans monastery. - MES, DE*

*When I was at school I hated it but more and more I believe it's fascinating. The way **we live now there's a reason for it and that's in our history** – and it can be linked to life so it's not a boring history lesson at school. - YAE, NL*

*The Islanders have their own history **it's kind of what makes them them ...** its interesting ... I love going there and finding out about it DR, DE*

*Castles! I have a crush on history series The Crown. The history of England intrigues me, **while we were in the mud they were a little classier.** It's very complicated there, their history is very intriguing. - LT, NL*

I don't want to do this. I'm an archaeology fan but it's just another thing to do, that's why I deliberately said I don't want to do that. All these things are really interesting, sure. It's only couple of hours but do I want to pack that into the time I've got there. Maybe spontaneously on the way back with a day to go then maybe. - CR, DE

*YES. You learn a bit more about it. Of course you forget it all. I love these crooked alleyways and these old old buildings. **But I don't want to go and see knights and re-enacting.** Maybe a little walk along dry stone walls or something. I'm not going to do this for a whole week doing this, 2 days maybe. - LT, DE*



Exploring History & Heritage



What it means:

- It's the jewel in the crown of England – but it can stray into lifelessness without the human stories
- History and heritage is not confined to old people on a coach tour – younger audiences are just as fascinated by the reflection on the life and attitudes of people now.
- But even for a history and heritage fan, a trip with more variety is often what they have in mind.

KEY IDEA

When creating or promoting product for this key element, remember to include variety to break up 'the old stuff'!



Especially interesting and motivating to US audiences – DE and NL less impressed by 'raw age' and more likely to compare with other historic assets in Europe



Experiencing City Life



What people say:

*I like to visit at least 1 museum about the country or the city itself. I've been to Cologne this last weekend, the German museum. **It's an old Roman city. I'm interested in history, that's one part of it.** And you understand the history and can understand the people a little better. The culture, want to know where I am and how did the people live there in the past. It's part of the atmosphere of the city.*

– CA, NL

City Life is not a must, but it's a hopefully soon. If you do several a year its interesting you think its enough now, you're out on your feet all day, it's not relaxing in any way, you spend a lot more money.. But then you get home an think I want to do it again!

– LT, DE

*I want to go to Liverpool and Manchester ... I have heard good things and **they are not London**... I'd like to get out into the country too...is it close?*

- YAE, DE

*I come from a big city, **all big cities are all similar.** You don't learn anything about the country in a city–*

OE, US

Experiencing City Life



What it means:

- 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 there's not a great deal of international identity for most English cities.
- There's some appeal to those visitors with a music and sport enthusiasts, but it's that personal interest and rarely the city itself that drives visitation, so growth of that appeal is limited by the musical/sporting assets available.

KEY IDEA

The highest profile character for most English cities is music or football, so embrace this theme where possible



NL & DE showed hints of a sport-related connection to other English cities



Outdoor Leisure Pursuits



What people say:

I'm not for fishing or golf. If I'm somewhere and there's one nice attraction to hike or boating maybe, I'd do them.

- CA, NL

*The areas are beautiful but the activities are boring for me. I do boat from time to time but its **not the reason to go to England.***

- YAE, NL

I'd go for walks, I'd recuperate and be happy to see the big outdoors. Maybe I'd rent a bicycle. With a bicycle you take in the big outdoors, you're aware of what's around you. - MES, DE

Yeah, I'd go for a little walk there why not...but not too long ...that cliff top looks really good .. I didn't think about that
- YAE, DE

*I mean compare to the Ardennes they have much more opportunity to do things and see distance and emptiness in front of you, and you're **not bound in by square streams.** They also have sports that we don't have, rugby, cricket, but not interested in. But it's fascinating that they have them. - OE, NL*

*I've never **done fishing or golfing, I don't have a dog, and rabbits don't like hiking so it's difficult to take rabbits...** - MES, DE*

I actually like lakes, I'd like to go paddleboarding or kayaking or something. - LT, DE

*If you wanted to go **real fishing you'd go to Scandinavia.** - CA, DE*



Outdoor Leisure Pursuits



What it means:

- As part of other activities and experiences, these are generally quite appealing.
- The challenge is many (even older) audiences found these things on the verge of boring.
- Because of this, for a lot of people, they didn't fire up the senses enough to motivate a trip to England in themselves.
- Gentle outdoor pursuits are almost by their nature quite generic – it means they struggle to feel distinct to any particular country on a holiday.

KEY IDEA

Outdoor leisure pursuits have frequent appeal as an add-on, and can be relevant to lots of holiday types as that



Attending Culture, Media, and Sports Events



What people say

*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.** – MES, DE*

*First of all, in England – it's high level anyways and good musical bands **so don't necessarily see a very big artist, but the level is pretty high anyway** so could go to a smaller club or pub anyway. Festivals – feeling and talent for pop music is unlike anywhere else in the world – so talented I don't know how it's possible. We don't know that here. So festival/concert, that's definitely appealing.
– CA, NL*

*Being a sportsman I think of football – **where do they play on Christmas - only in England!** - MES NL*

*There fans ...they are so different... so noisy and passionate ...**they are not like German fans or anywhere else** .. You go to the games and just watch them ...I wouldn't watch the match at all I'd just watch them
LT, DE*

*Sport - **heart and kidneys you're a fan in England**, England football matches. I wouldn't go if I was going to Asia, the match is important but the surrounding experience is very important. It's really part of my England feel. I'm interested in sports in any country, but football is part of my England feel. –
YAE, NL*



Attending Culture, Media, and Sports Events



What it means:

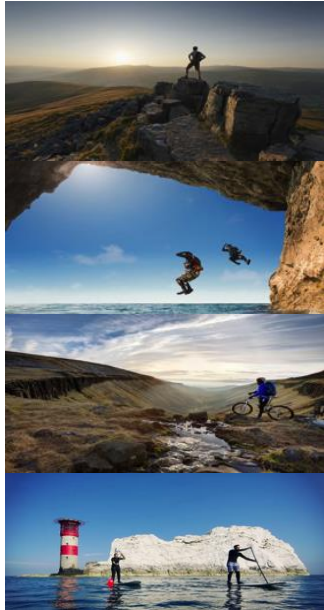
- Many parts of the CMS offer appeal, and in many cases do so while feeling very English.
- People imagine themselves having these experiences very easily, and many of their anecdotes about English holidays relate to this kind of activity.
- Even sports and events though, often appeal because of the insight they provide into English people, so an 'everyday' game or concert can be just as compelling for a fan..

KEY IDEA

To fully take advantage of this appeal requires access to simple, international ticketing purchase which those interested currently feel is lacking



Challenge & Action



What people say:

*In Austria, this is what we do! But I can't link it right away to England. We've tried to find places for this but we couldn't find them. We'd be thinking London – **how can it have the sports thing there – what would we do, jump from the plane to get there?!** When we were searching for vacation in the South of England we didn't look for this stuff, we didn't know it was an option. I can't picture it as an option. Perhaps I'm not informed,
- MES, NL*

*Old English resorts. It's not that colourful. There aren't many outdoor activities, there's romantic coastline with a romantic sunset but not much more. **Challenge is not something I see as England at all.** If there's a mountain there I'll go up it but I do that wherever I am.
- CA, DE*

*I'm really not into that at all. I'm a lazy bitch on vacation. Well that's not true, I like walking around and stuff, but I don't go on holiday to do exercise and get the feeling I'm going to the gym, that's not what it's about. **England has an old fogey image for me,** so maybe I'm rejecting this because it doesn't fit into my image. These activities can be fun anywhere, but they don't really fit into my image of England. – OE, NL*

*This is what I'm looking for, this gives me a kick, this is super cool, jumping off a mountain, it's super-gaaf. These beautiful images of these cliffs and beaches, there's these grey looking cities but there's this enormous diversity. You know I could go here in the summer instead of France or Spain. The weather is less certain. **Right now you think of England as just about long walks and hiking, slower calmer sports** but I do realise now they have more. – YAE, NL*

Challenge & Action



What it means:

- Most visitors start with a picture of tourist London or charming villages – the leap to serious sports and the outdoors is too far even (or especially) for an enthusiast.
- The competitive landscape is extremely challenging – the territory of serious action and adventure landscapes is has been claimed by mainland Europe like Austria, or even close to home in Scotland and Wales.

KEY IDEA

Cutting through will need significant marketing effort to first legitimise the terrain for these activities.

P

Unlikely to have extensive appeal to existing visitors, but if the legitimacy issue can be addressed are likely to attract a marginal audience not catered to by other clusters

Summary: Key Activity Cluster Ideas

Visiting Famous/Iconic Tourist Attractions/Places – Most people feel they have to (and will) do them, but the broad appeal can make the famous and iconic places feel less special

Exploring Rural Life & Scenery – Rural life is the most compelling part of this experience – scenery is more generic

Exploring History & Heritage – Popular, but variety is important to break up ‘the old stuff!’, even for fans

Experiencing City Life – best known and most appealing for football and music, but could be leveraged at a more everyday level

Outdoor Leisure Pursuits – Have frequent appeal as an add-on, and can be relevant to lots of holiday types as that

Attending Culture, Media, and Sports Events – Relies on access to simple, international ticketing purchase which feels challenging for Visitors

Challenge & Action – Cutting through will need significant marketing effort to legitimise England for many activities.



Particularly motivating for NL where people tend to feel true Rural Life is especially rare



Especially interesting and motivating to US audiences



NL & DE showed hints of a sport-related connection to other English cities

ALARM

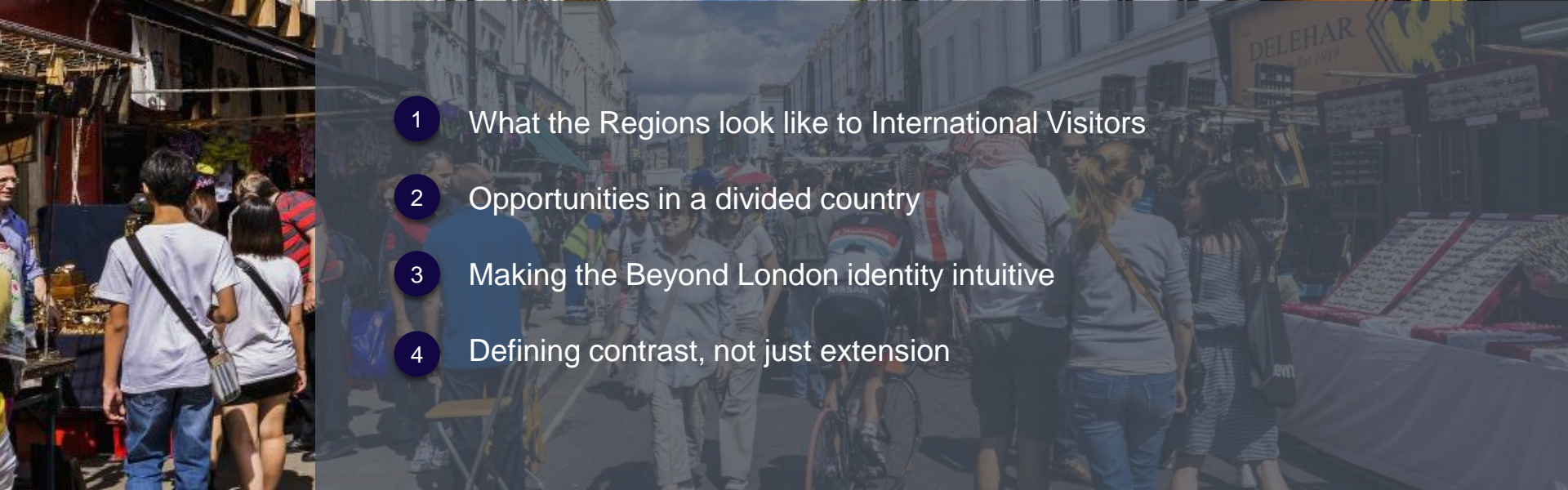
“Barm-Cakes”

A photograph of a shopfront for 'Barm-Cakes'. The shop is housed in a stone building. A black awning with a white scalloped edge covers the entrance. The awning has the name 'Barm-Cakes' in a large, white, cursive font, with 'Confectioners & Sandwich bar' and the phone number '01772 780599' in a smaller, white, cursive font below it. The window display is visible through the glass, showing various items including cakes, a globe, and decorative items. A person is visible inside the shop near the entrance. A white van is partially visible on the right side of the image.

Confectioners & Sandwich bar 01772 780599

Part 5 – The Bigger Picture of Regional Identity

Section Outline:

- 
- 1 What the Regions look like to International Visitors
 - 2 Opportunities in a divided country
 - 3 Making the Beyond London identity intuitive
 - 4 Defining contrast, not just extension



Low Regional Awareness

Regions have little or no recognition, and Germany leads what little knowledge there is.

- Even when they've been visited...
- ...or look on paper like the ideal destination.
- The Lake District seems an opportunity – clear product, highly aligned to the international view of England, little to no brand awareness.
- The South West doesn't have the same international brand awareness – it's by and large all Cornwall
- Where other regional awareness exists, it's often around England's industrial heritage, or particular activities (*see right*)



DE have the highest levels of knowledge about English regions and cities, usually related to sport or TV

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.

- MES, DE

*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?** I've heard of Norwich too, but it's not something I need to go and see. – CR, DE*

*Peak District national park! It's in my homework! We're going to go there. We're going to do Edinburgh first and then Manchester down to the Peak District. I just want to walk through it, it's a reason to spend a day outdoors. They're restoring it, putting water back into it. The industrial atmosphere, **fortunately no chimneys so no soot any more but it's still got the industrial charm** I like. – CA, DE*

*There are parts of England I don't know. But hiking, I like that. Hiking and cycling I like very much too, when wife retires we'll maybe do that in Scotland. England too, but I don't know every region that well. **I've been up to these mountains somewhere, but I don't know the area** – CR, NL*



The Challenge of a Distinctive Identity

The appeal of the regions and their assets once exposed is high, so the product has potential if we can find a way to give it identity.

- 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.

I'd like to combine, like Norwich and London. – CA, NL

*London – I'd pick the highlights, Big Ben, Buckingham Palace. But with Barcelona I saw some of the countryside too, **I really left the city, I checked the internet for nice places to eat and things and wanted to go there outside of the touristy spots.** Nature can be parks in a city, but also what's around the city – CA, NL*

I really want to go to Yorkshire ... I saw James Herriot ..that Vet .. It looks so beautiful there – LT, DE

*Yorkshire, what was appealing was the **combination, nature and the city** combining the two. – YAE, NL*

KEY IDEA

The greatest engagement and intrigue comes from things which provide a contrast, not an extension.



London the Outlier?

The Dutch are incredibly well-informed about us, and Brexit led to a lot of rolling eyes for European audiences, but perhaps there's the hint of an opportunity in it...

Local result

- Majority leave ■
- Majority remain ■
- Tie ■
- Undeclared ■



 View fullscreen



...the 'Brexit divide' may spark curiosity to see the 'real England' from well-informed European markets because of well-publicised differences between London and the rest of the country

*The real English people when you talk are very closed to outside of England and you look at the way they are separating themselves from Europe **and it's a national trait, they're very nationalist.** You have these small villages, Cotswolds, where time stands still. I'm more interested in England outside of London, the real England. – YAE, NL*

*In London you have the chichi neighbourhoods, you have housing in the wrong direction, foreigners buying whole neighbourhoods. London after Brexit I have an idea that **London is much more like NY than the rest of England** for instance.*

– OE, NL

*Culture – you're in the midst of it so you can't not experience it. The people – why are they very to themselves, you know **the Brexit, island feeling.** So you could have those conversations with the children.*

– MES, NL

Brexit – they don't want us, so perhaps I'll go to Ireland! – CR, NL

Intuitive Definition of English Regions

The most intuitive way to define something:

HOT  Not **COLD**

CALM  Not **TURBULENT**

BOOM  Not **BUST**

THE NORTH  Not.....?

Reframing London Plus

The motivation is in contrast, not extension - so could we reflect that in how we define it?

- A clear contrast to London is what the subconscious appeal is for visitors – how they appraise other places, how they define them, how things become WOM-worthy when they return home.
- Perhaps a change of emphasis in how we describe these trips may lead to an evolution of how we promote them, and become better able to identify salient features and messaging.

KEY IDEA

It's not a visitor-facing term, but perhaps 'London Plus' shapes the way the industry presents itself.

*Everything in the NL 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** – OE, NL*

*All cities, in the end, are similar. In London, the newly built parts are very contrasting to the old, and shopping is very good, but it's not a reason to go back. **To see something interesting, I'd need to go to other places.** – CA, NL*

*These are completely contrary things so they might be interesting to **combine – London and walking through mountains.** – OE, NL*

***Seen London, now I want to see the rest of England!** Cotswolds, fantastic. Lake District, Pride and Prejudice - all kinds of things we've discussed! – LT, NL*

*I know London... **I want to see somewhere else ...somewhere in real England ...Liverpool..**You still have to go to London – LT, DE*

The industry talks a lot about

London Plus...

The industry talks a lot about

London Plus...

...but for curious visitors is there something compelling about



London Versus?



Part 6 – Wider Opportunities Around the Product



Section Outline:

- 1 The challenge of existing website resources
- 2 Why we don't yet feel good value to International visitors
- 3 How could we talk about the reality of the tourist trail
- 4 Standing out in an increasingly bland, global backdrop
- 5 How England can make the past seem urgent



The Functional Need for a Guide to England

The actual assets on offer are often a surprise, even to those who've been researching and booking recently.

Maybe I need to plan a whole new holiday now?! I now realise I've only planned to see one tiny bit of it, I'd have to stay a long time and do a couple more cities. I really mean it, I need to go for 2 weeks and see more of it.
– MES, DE

*I've thought of this a lot lately – what I want is clear – I want to be able to go online like booking a hotel, with the checklist of features and needs – and **the website then shows you all the places you can go**. Maybe this is a great new idea?! People know other places in England, but where to find what. There's not enough information. Maybe there's some great hiking areas but I don't know.* – MES, NL

KEY
IDEA

Awareness of existing websites and tools for integrated researching and booking is not high

KEY
IDEA

Struggles with finding information online are not limited to older audiences and segments

*It's tough, I'm trying to get my information myself on the internet, and **all I can find are trips by ferry**, It's not like something ever pops up - a fantastic place, nothing comes my way like that. The Lake District you get there may be lakes, but unless you show me how fantastic it is what will I do?*
– LT, NL

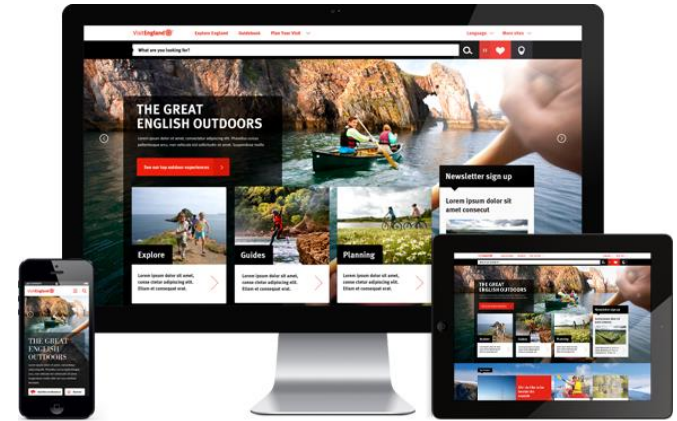
The Functional Need for a Guide to England

What England needs in the eyes of the international visitor is a user-friendly, methodical way to inspire, find the hidden gems, and organise activities.

- The product itself (some accommodation perceptions notwithstanding) is generally appealing to these International Visitors
- But most of the ideas, assets, and experiences shown were a surprise
- Without the awareness of experiences and destinations on offer, there's not enough motivation to do the digging across multiple, obscure, and unconnected sites

KEY IDEA

The user experience for piecing together an English holiday may be a bit too much of a challenge at the moment for the casually interested – what can we do to improve this?



Football tickets are **difficult to purchase**. The train you must also make reservation online because of the price. These things, they're hard to do on the day itself. – CA, NL

It's like Amsterdam - people come to Amsterdam but don't know the beach is half an hour away, or the villages nearby, so you go shopping the same as in Oxford Street. Amsterdam is not just the Kulverstraat – that's the superficial side. – CA, NL

Seizing the Initiative on Value Perceptions

The effects of a cheap pound are not yet being felt around the world, but perceptions will take time to change and may present an opportunity as they do.

- London has a lot of responsibility for perceptions of England as an expensive holiday.
- It can be a barrier, especially when comparing to competitors.
- But as the pound's slide opens up reconsideration of the value of England as a destination, there may be a chance to reframe around London Plus or Non-London.

England is also expensive, especially in London. In Spain it's €1.20 for a coffee you know?! - CR, NL

If you go to Britain it's expensive, little cheaper now because of Brexit but it's still expensive. – MES, DE

If we were able to find what we have in Austria in England we'd go to England because it's nearby, but on the other hand it's expensive, because of the pound, the exchange rate. – MES, NL

Not interested in London at all. It's always nice but it's not on my agenda at the moment, it's too expensive. – CA, DE

KEY IDEA

A simple, functional positioning of the regions as a cheaper and more authentic way to access 'Real England' may be worth considering in the promotion of activities.

Opportunities in the Tourist Trail 'Chore'

We saw that visitors can feel they have to work through the icons, so is there an opportunity in acknowledging this fundamental human truth about the tourist trail?

- This could be directly addressed in communications...
- ...either by suppressing the things about it they don't like *'familiar pictures', 'large crowds', 'nothing new to learn' and 'nothing interesting to say about the place'*
- ...or through a direct call to action - *'you're already on holiday, you don't have to earn the bits you enjoy by doing the things you don't'*

**KEY
IDEA**

Traditional 'must-see' icons present a challenge in appeal of the experience, but 'London Versus' tone of communications may offer an antidote



An Opportunity in Globalisation

Globalisation has had a hard time in recent years – and visitors are pretty hard on it too!

- A local identity (or food culture, especially) is hard for visitors to identify in many Western cities.
- London, therefore, apart from the unique one-of-a-kind sights like the Tower of London and Buckingham Palace, can feel very familiar, and therefore not that intriguing.

KEY IDEA

There's a sense that global, modern cities are all increasingly alike to the International Visitor.

*Banksy, oh yes he's from Bristol, **saw the exhibition in Amsterdam.** Wouldn't go to Bristol just for that though. – CA, NL*

Of course the architecture is slightly different, but these modern things look exactly the same, every pedestrian shopping street looks the same. Modern stuff looks the same wherever you go. I want to go to something regional and local and small. – CR, DE

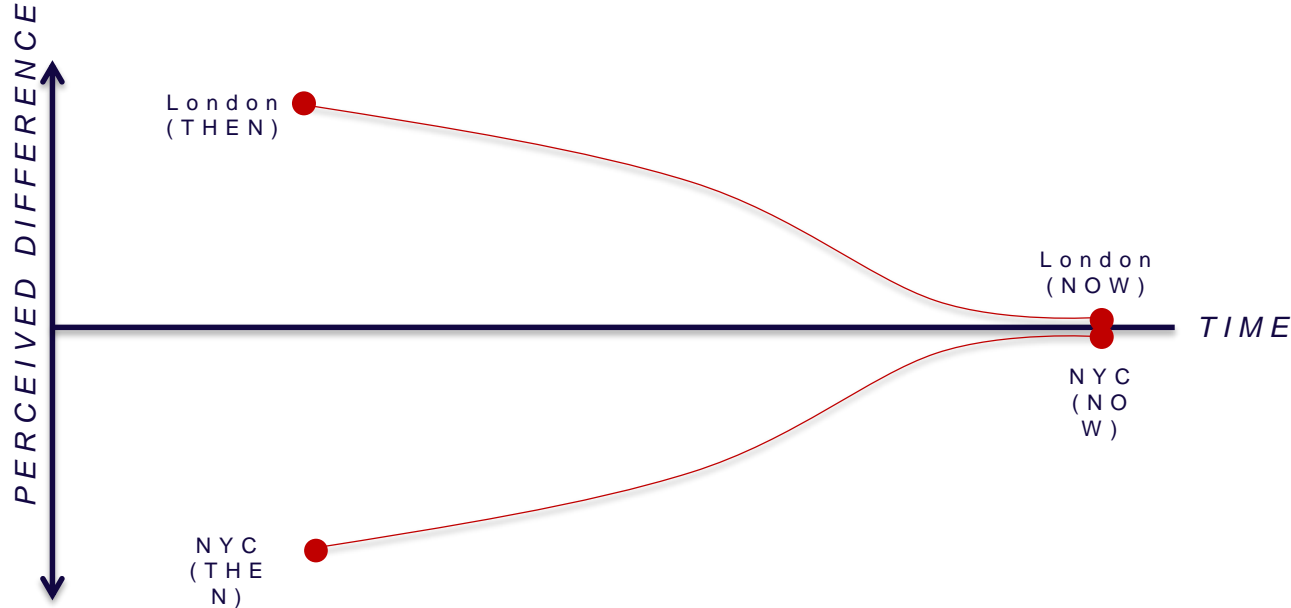
I'm not really into American cities and modern architecture you find everywhere, I prefer the more historical cities. LT, DE

The city pictures are generic, like shopping streets here in Germany. – CA, DE

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. – MES, US

The Convergence of Culture

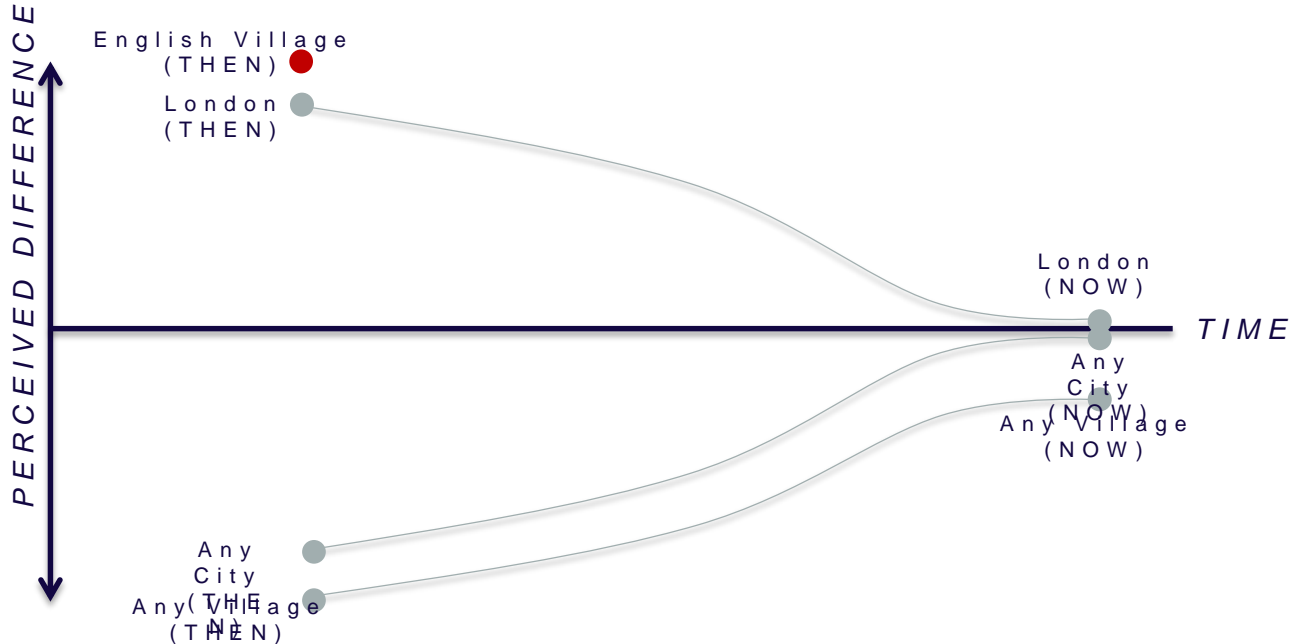
The big global cities are perceived to be becoming more like each other every day.



Thursday, March 30,
2017

The Convergence of Culture

But English villages are seen as almost unchanged from the past (unlike their own).



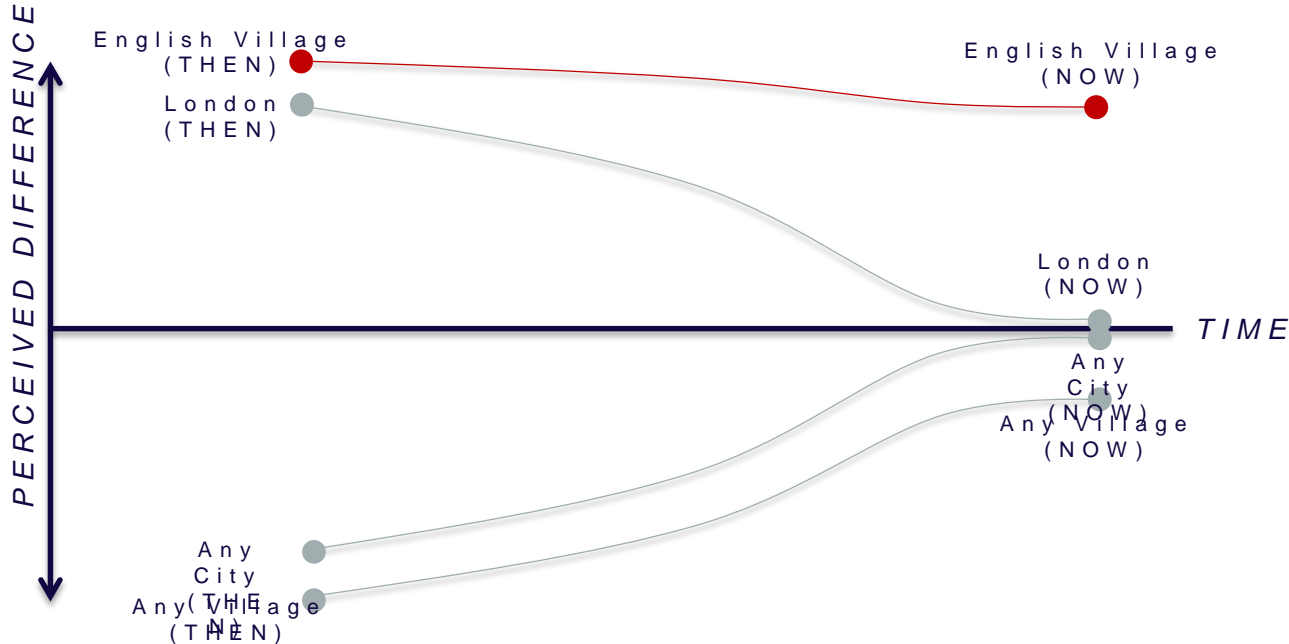
I'm more interested in how things were than how they are now, because how they are now is like what we have now - not distinctive.
- YAE, NL

This photo of a village ...this could be nowhere else but England ...they still have them like nowhere else
- LT, DE



The Convergence of Culture

But English villages are seen as almost unchanged from the past (unlike their own).



*"You'd see what life used to be like and what life is like now, it's original, and so different to here, typical rural life that we don't have any more, so different to us here now. The carefree attitude to life."
- CA, DE*

So, Rural English Life is a Window to the Past...



Thursday, March 30, 2017

Heritage in a Globalised World

The appeal to visitors revolves around that contrast of old and new (which many never get to truly see) but the challenge is making that feel current.

- Outside of English tourism, the evidence is that old things disappear - it's where the sentiment '*not like it was in the good old days*' comes from.
- So 'Oldness' and 'Heritage' bring with them 'fragility'.
- Is there an opportunity in this implicit tension?



KEY IDEA

Could a 'fragile heritage' be a more sophisticated presentation of England's core identity, and catalyse the way we talk about England outside of London?



Can we take any inspiration in selling a 'window to the past' from the masters of it?

REVEALED: Things to do in Cuba before it changes after death of former president

THE DEATH of Cuba's former president Fidel Castro has brought about these changes take place.

By JYOTI RAMBHAI
PUBLISHED: 11:03, Wed, 28 Nov 2016

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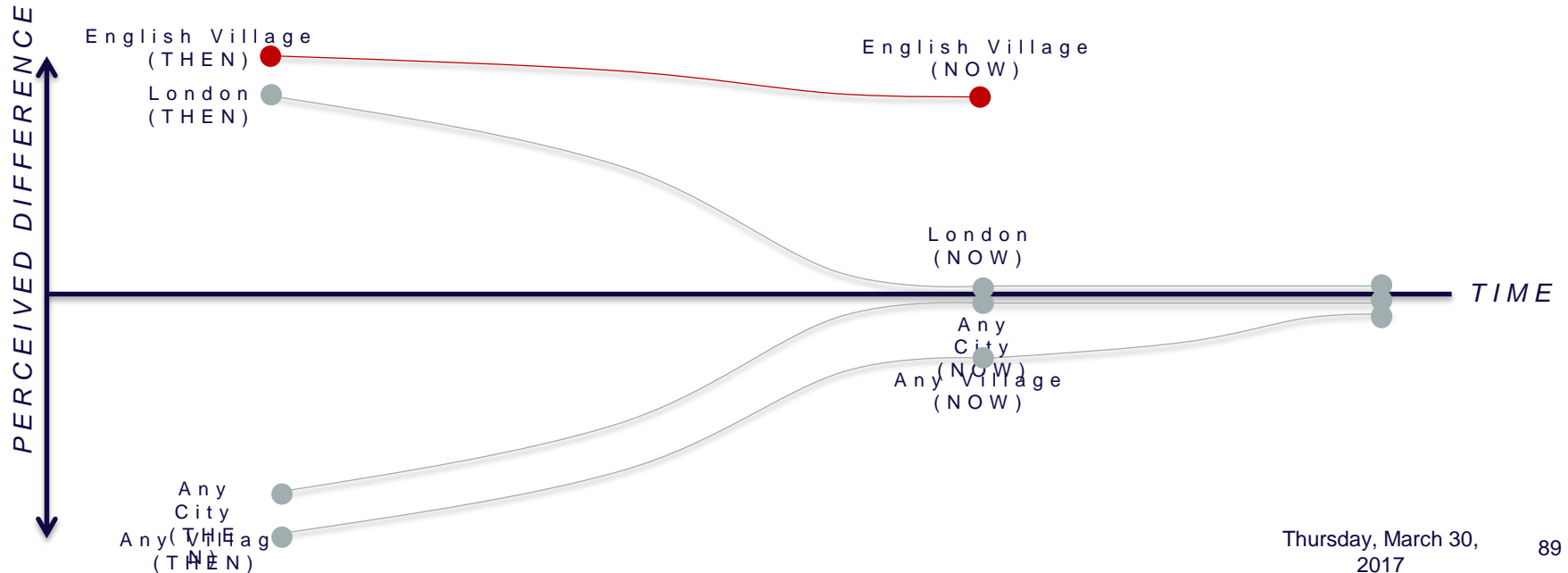
1 of 14 Next All





The Convergence of Culture

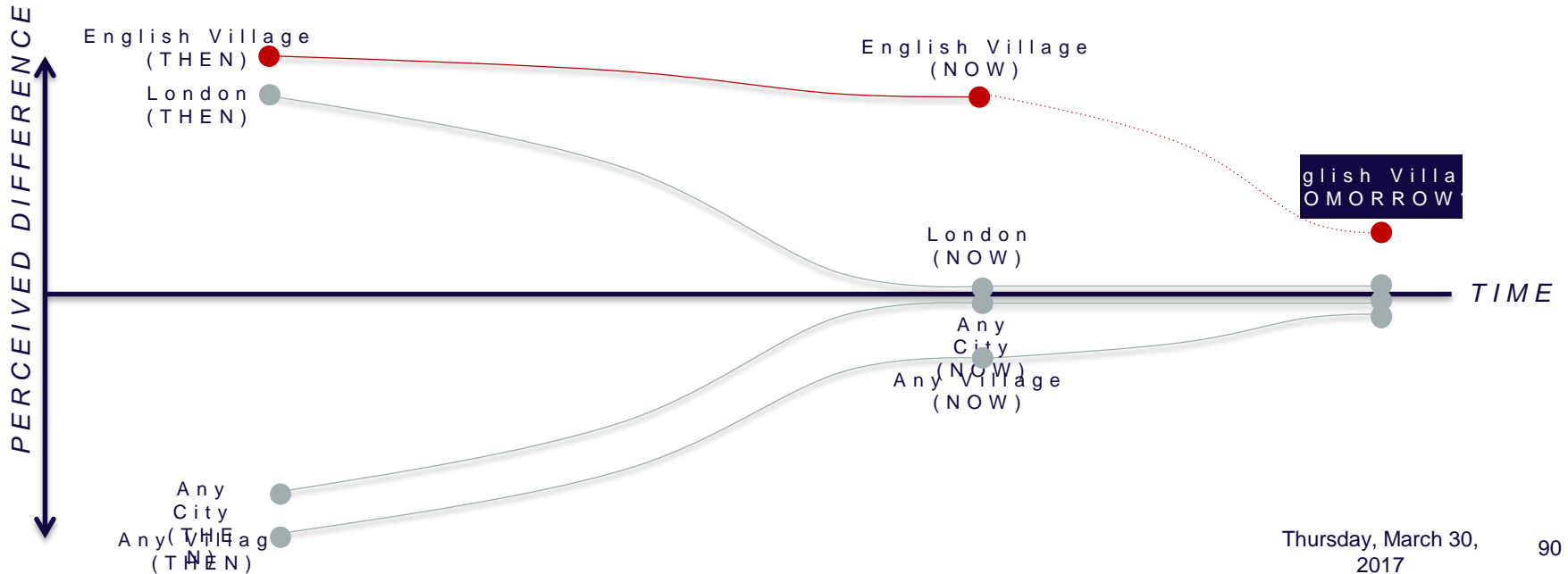
The sense of 'inevitable homogeneity' may add some urgency to one of England's key selling points – heritage and history.





The Convergence of Culture

The sense of inevitable homogeneity may add some urgency to one of England's key selling points – heritage and history.



So, Rural English Life is a Window to the Past...



...but for how long?



Part 7– Identity and First Steps towards the USP



Section Outline:

- 1 The value in an identity, not just a feature list
- 2 The fundamental English Difference



England's Identity

It's not the assets or activities themselves that make England what it is to international visitors, but the theme of its character.

- Some of the highest profile destinations do this very simply for the outsider:

London Not buildings, but **Heritage**

Paris Not cafes, but **Romance**

Rome Not ruins, but **Eternity**

NYC Not commerce, but **Energy**

Milan Not shops, but **Fashion**

Vegas Not slot machines, but **Sin**

France Not restaurants, but **Indulgence**

Italy Not food, but **Love of Life**



Iconic destinations have an organic, conceptual image of what they are and represent.



The English Difference

For England, that quality is contrast – with modern life, with the rest of the world, and even with London itself.

‘Reserved characters, but weird and eccentric’

‘Classy people, but drunk all the time’

‘The world’s oldest, but often home to the zeitgeist’

‘A tiny place with a lot going on’



*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!** – MES, NL*

*I went to a dungeons and dragons kind of festival thing in England, people in ornate costumes dressed as fairies, wigs, extraordinary clothing and so much fun. It does exist in other countries, but there's definitely a **match there with the personalities and characters of England!** – OE, NL*

*The Islanders they **are different ... They are crazy** , I mean look at Brexit that is too crazy for words.. But I want to see why? – LT, DE*

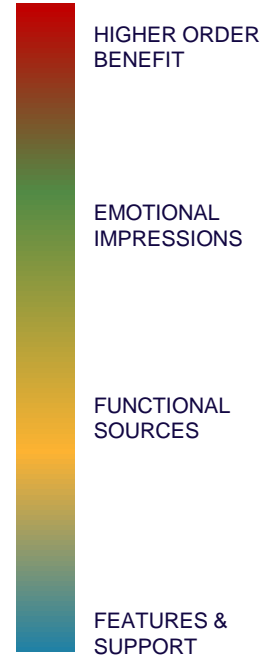
Thursday, March 30,
2017



Part 8 – Summary

Summary: England and the Motivations to Visit

'I'm experiencing a contrast with modern life, the world, and itself'



The Essence:

The Key Themes:

The Proof Points:

Where to Find Them:

Key Experiences:

Supported by:

<i>England, Great But Small</i>	<i>Tiny But Mighty</i>	<i>Reserved, Yet Eccentric</i>	
<i>Old But Zeitgeisty</i>	<i>A Window To The Past</i>	<i>Classy Yet Often Drunk</i>	
<i>London Versus</i>	<i>Everyday English Life</i>	<i>Local People</i>	
<i>Crazy Food</i>	<i>Pubs</i>	<i>Passionate Sport Fans</i>	
<i>Live Music</i>	<i>Village Life</i>	<i>Eccentric Museums</i>	
<i>Culture, Music, and Sports Events</i>	<i>Experiencing Rural Life</i>	<i>Exploring History & Heritage</i>	<i>Outdoor Leisure Pursuits</i>
<i>A strategy that makes your money go further</i>	<i>A tool (website) that makes planning more efficient</i>	<i>A rejection of the 'chore' of the Tourist Trail that makes your time go further</i>	



maru/edr

Thanks

Prepared by One Minute to Midnight