



# Discover England Fund Research Summary Report

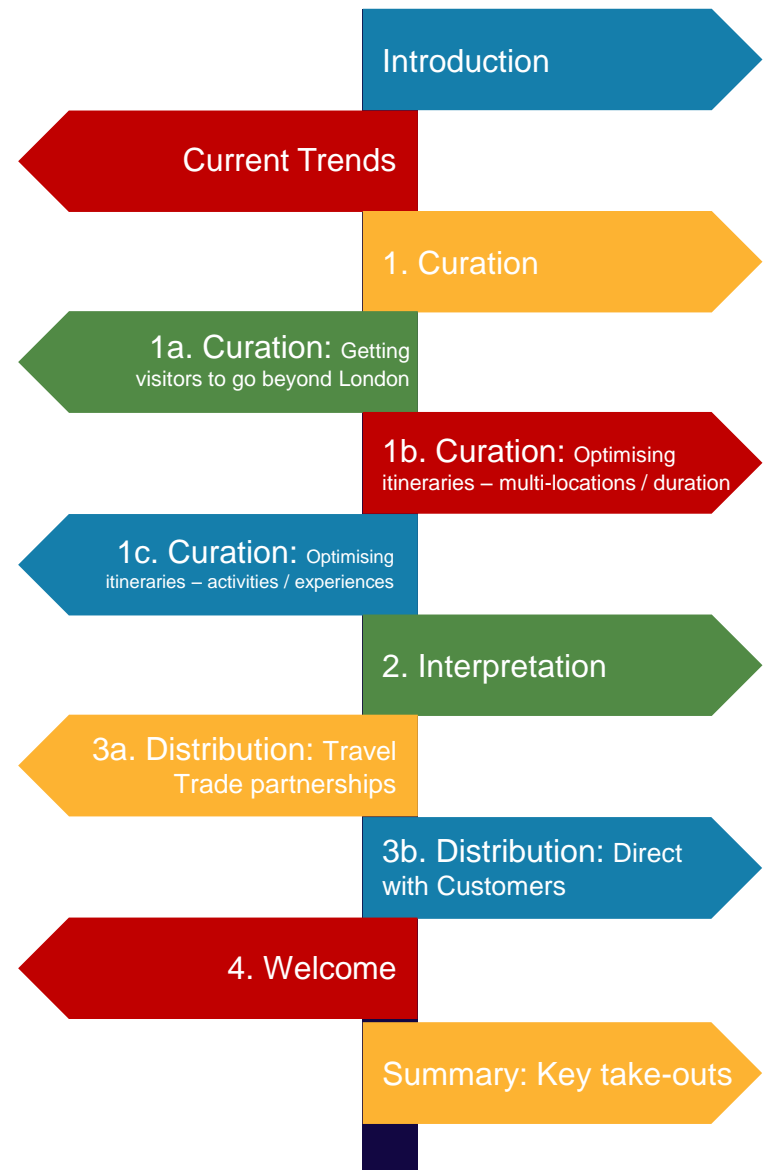
The Collection – A Journey through 2000 years of English History  
December 2017





# Contents

- This report brings together the key findings and insights relevant to this project from across the VisitEngland research programme.
- It is designed to provide the Discover England Fund Large Project teams with a summary of the key themes and relevant market profiles. It can be used to guide project development activity and inform stakeholders and partner organisations.



Note 1: Sources are short-referenced on each page. Full details of data sources including links where appropriate are included in the appendix.

Note 2: Data is not always available for all countries that are relevant to the project, due to limitations of the individual source research projects.



# Introduction



# Project overview



## Key Messages and areas of focus

### Elevator Pitch

Introducing the Collection, a journey through 2000 years of English history via the most significant historic cities in regional England.

Aimed at younger travellers from the US who are into independent exploration and discovery, the Collection brings fascinating people and momentous events from the past to life using augmented reality to fully immerse visitors in the history and culture of England.

An itinerary planning tool will help consumers plan and book their own journey online while a resource hub of commissionable product supports the travel trade to tailor the Collection to their customers' requirements.

This is the first time that England's Heritage Cities have been packaged with London and presented as one product for the international market.

Beyond a recap of the current trends of inbound visitors to regional England (using the most recent data published in 2017 where available), the majority of this report is structured around the four activity strands that Heritage Cities is focused on.

Please note, there was limited secondary research available for the Welcome strand.







# Current Trends

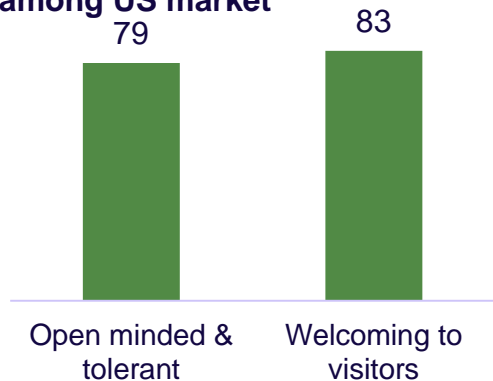


# Perceptions of Britain among Americans are extremely positive and is unchanged post Brexit

## Perceptions of Britain - Brexit

- Those on the West Coast are more likely to find the people of Britain welcoming compared to those on the East Coast\*
- 91% of departing Americans felt 'very' or 'extremely' welcome in Britain\*\*.

Perceptions of Britain (%) among US market



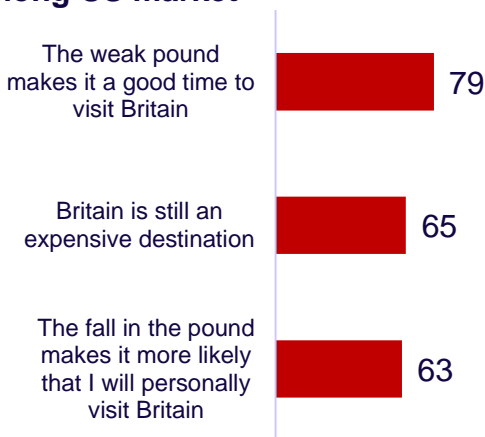
\* Source: Key States of America Consumer Report, June 2017

\*\* Source: VisitBritain Market and Trade Profile USA

## Exchange Rate - Brexit

- There is high agreement that the weak pound makes it a good time to visit Britain.
- However, Britain is still seen as an expensive destination.

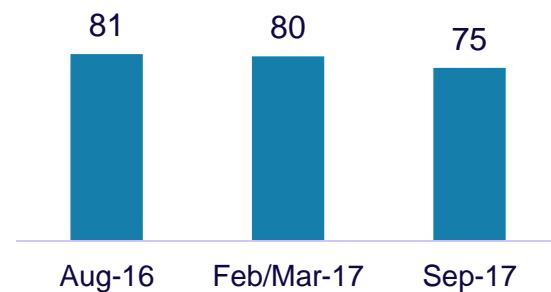
Exchange Rate Impact (%) among US market



## Perceptions of Britain – Safe & Secure destination

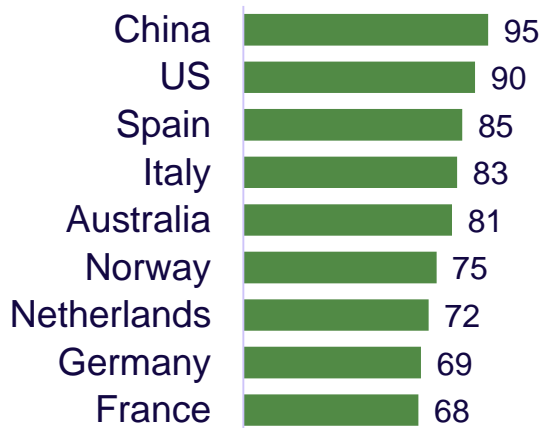
The threat and reality of terror is impacting traveller attitude & behaviour – the US market saw a notable decline in agreement with 'Britain is a safe and secure destination' following a number of terrorist attacks during 2017.

Britain is Safe & Secure destination (%) among US market



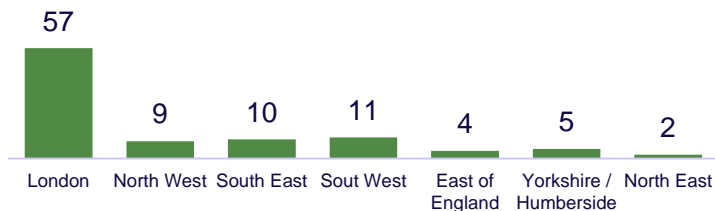
Interest in visiting England remains high among Americans with London the top of mind destination. Repeat visitors from the Tri-State area are a target opportunity

**NET Consideration of England by market**



Source: Discover England Fund – Activities & Themes Research 2017

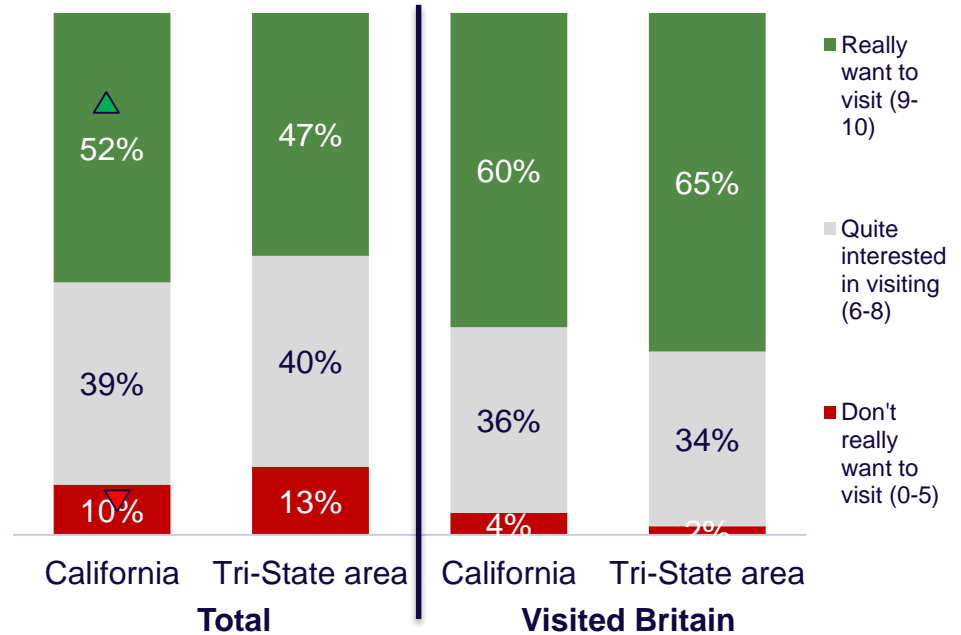
**Where in England would you like to visit? (top of mind %) – US market**



Source: Visit England International Omnibus, 2013

- Almost 6 out of 10 American holiday visitors\* (excl. UK nationals) are making a repeat visit to Britain

**Interest in Visiting Britain**



Source: Key States of America Consumer Report, June 2017

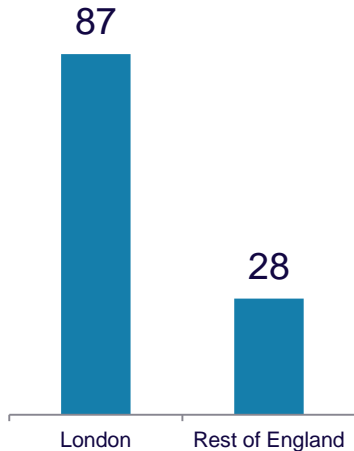
\* Source: VisitBritain Market and Trade Profile USA



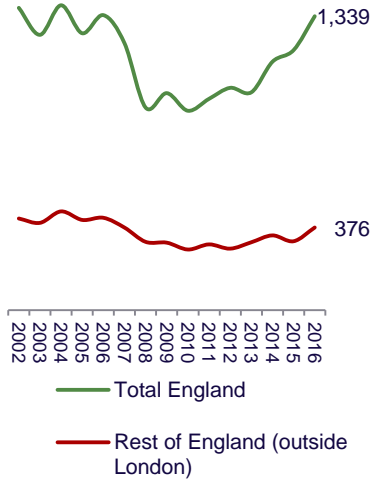
## Current inbound travel trends to England from the US

- Inbound visits have increased to regional England from the US but it still accounts for only 28% of all trips to England made by US visitors.

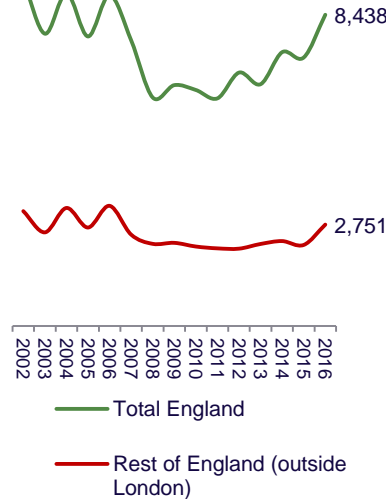
**Proportion of visitors from US visiting London or Rest of England (%)**



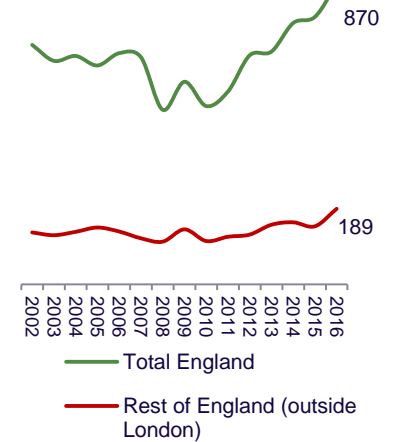
**Holiday Trips by US visitors (in 000's)**



**Holiday Nights by US visitors (000s)**



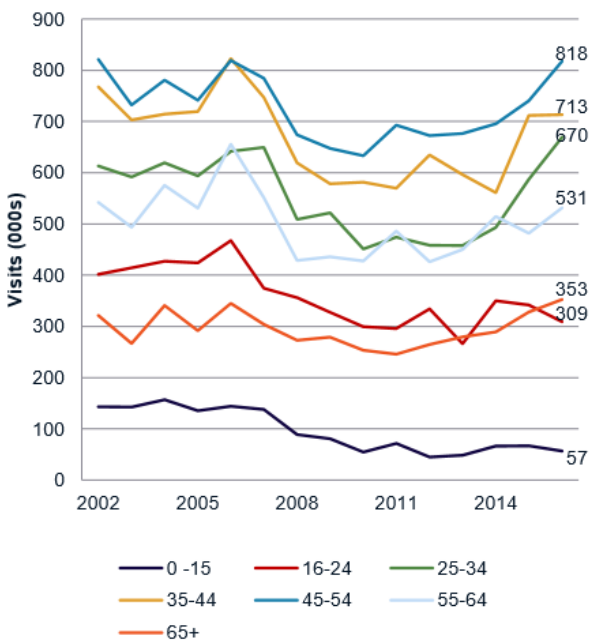
**Spend on holiday trips by US visitors (£m)**



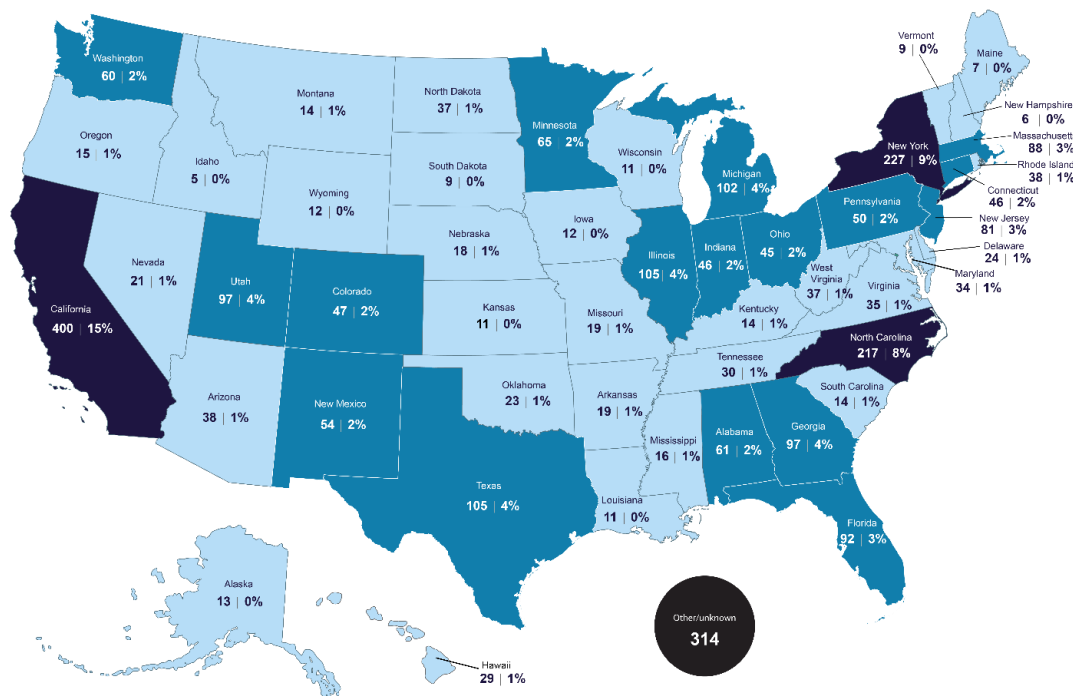
## Who is visiting the UK - current inbound travel trends to the UK from the US

- American visitors tend to be older than the average visitor to the UK: 49% of American visitors were aged 45+ compared to a total average of 39%
- Within the US, the states of California (15%) and New York (9%) are the largest source markets for visitors to the UK. There are differences between those in California and Tri-State area. Californian's state they have more opportunities to travel (55% : 42%); and go on more vacations - 55% go on 2 or more vacations a year versus 48% East Coast

### All visits to the UK – US Visitors



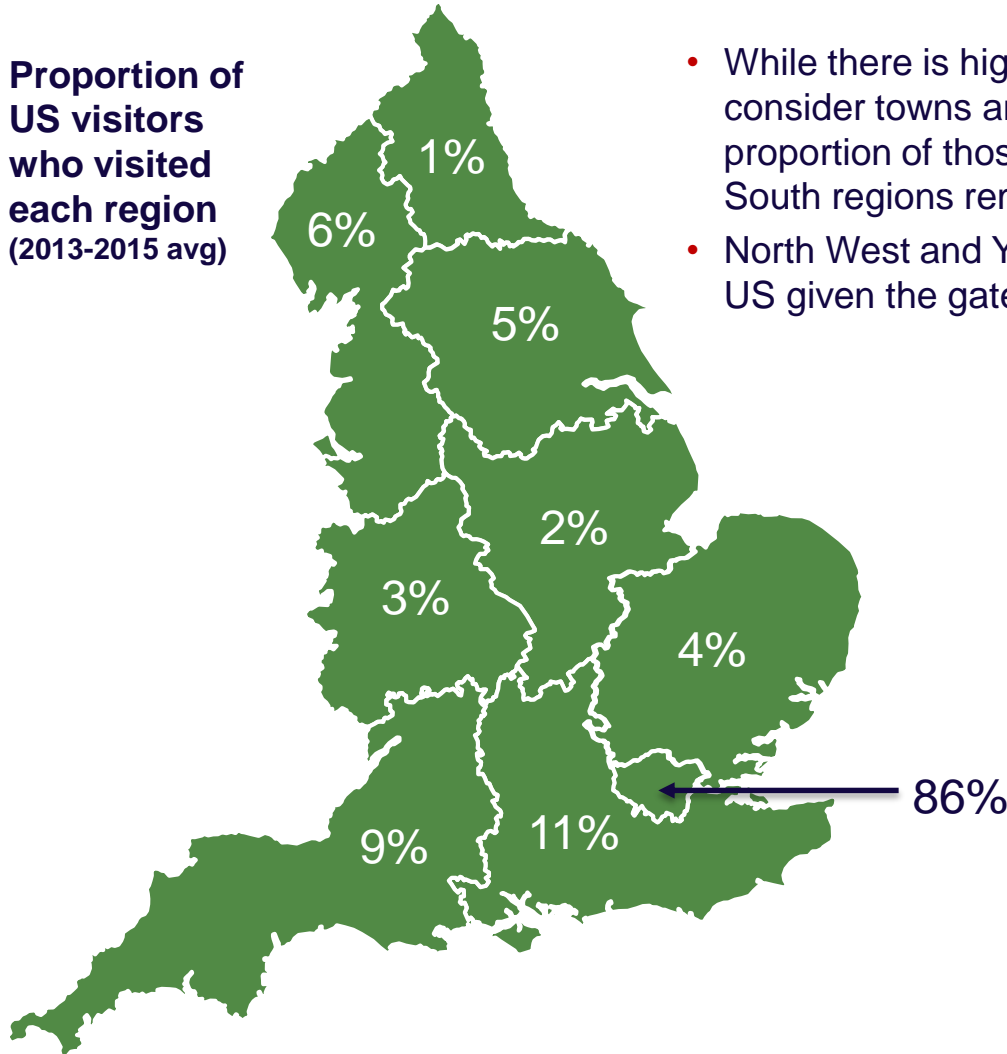
Source: International Passenger Survey by ONS, 2016



Source: Key States of America Consumer Report, June 2017

## Where are they visiting – there continues to be a clear North / South divide in the regions that Americans visit whilst on holiday

**Proportion of US visitors who visited each region (2013-2015 avg)**



- While there is high consideration among Americans to consider towns and cities outside London, the actual proportion of those visiting regional England beyond the South regions remains relatively small.
- North West and Yorkshire have had more visitors from the US given the gateway in Manchester.

### Locations considered in England by the US market

	DEFINITELY/VERY LIKELY
London	83%
Historic towns and cities (i.e. outside London)	74%
Countryside / villages	67%
Coastal or beach locations	62%
Modern towns and cities (i.e. outside London)	59%

Source: VisitBritain Market and Trade Profile USA



# 1. Curation

- Aim
- Getting visitors to go beyond London
- Optimising itineraries
- Multi-locations / duration
- Activities / Experiences



## Curation Strand: Overall Aim from the brief

This strand will involve developing the presentation of 15 destinations as a single Collection and linking it to London. It will describe the best way to adapt and tailor the Collection for both the travel trade and the independent visitors as well as establish the 'destination' package that will be used to keep visitors in the cities overnight and potentially for several days.





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Insight

## 1a. Curation

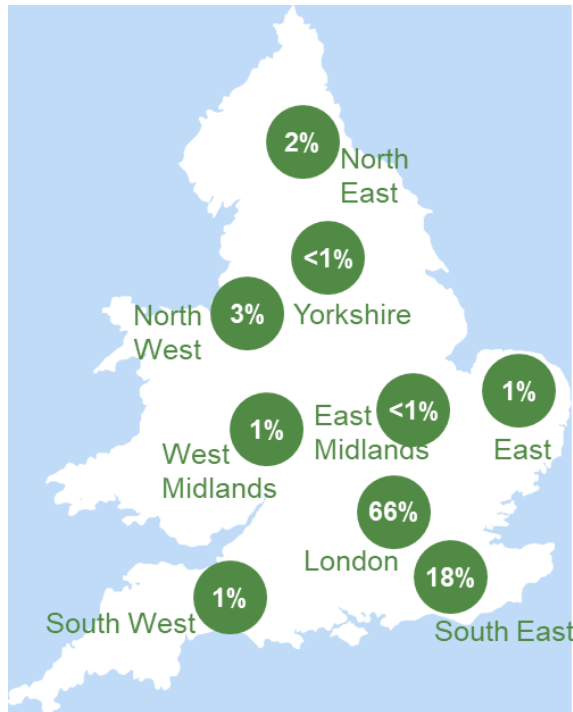
Getting visitors to go  
beyond London

London

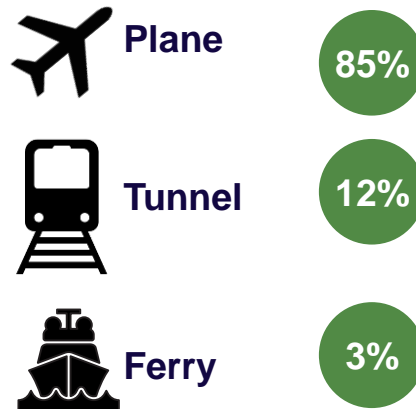


# The majority of American visitors enter the UK through London but Manchester is also a key gateway for Americans

## Gateway - All UK Holiday Visitors (all markets)



## Gateway mode - US Holiday Visitors to the UK



- 85% of American visitors\* travel to the UK by plane. Another 12% arrive through the Channel Tunnel as part of a multi-country trip and 3% by ferry.
- Three airports in the UK welcome 92% of US direct flights into the UK. London Heathrow received more than 3 in 4 direct flights in 2016, followed by Manchester International and London Gatwick with 8% and 7% respectively.

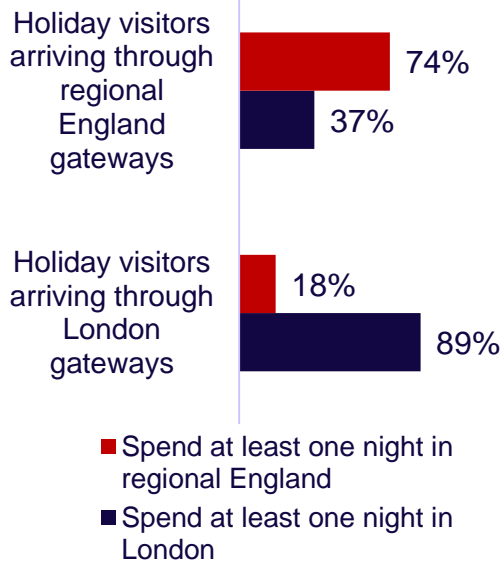
### Considerations:

- Partnerships with London is key (and London Plus is already a focus for the project) but Heritage Cities should also consider partnerships with Marketing Manchester given this is another potential gateway for Americans.

\* Note: This is all visitors, not just those visiting on holiday.  
Source: VisitBritain Market and Trade Profile USA

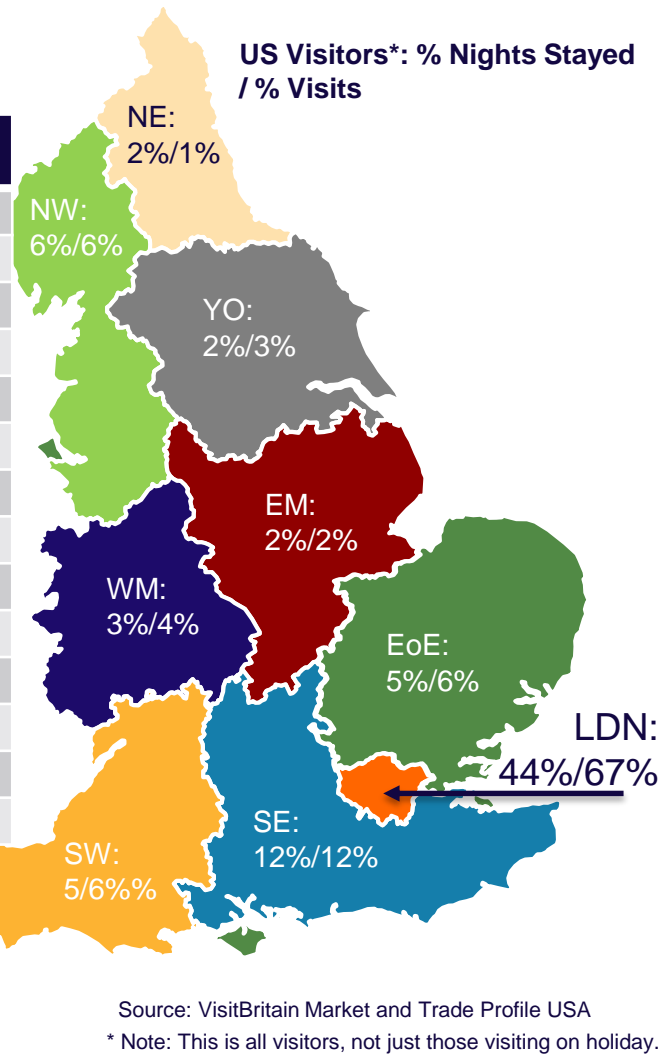
The majority of visitors tend to stay in or close to the region they have entered, with London and the South dominating visits and nights stayed among US visitors

### Where do they stay? (all markets)



### US All visits\* to the UK in 2016

Region*	Nights stayed (000)	Visits (000)
Total	28,394	3,455
Scotland (SC)	4,109	451
Wales (WA)	410	85
Northern Ireland (NI)	316	54
London (LDN)	12,435	2,322
North East (NE)	612	39
North West (NW)	1,833	191
Yorkshire (YO)	484	99
West Midlands (WM)	926	149
East Midlands (EM)	657	74
East of England (EoE)	1,526	191
South West (SW)	1,513	214
South East (SE)	3,339	427
Nil nights (Nil)*	N/A	23



Source: International Passenger Survey by ONS \* The region is based on the location in which the visitor stayed overnight

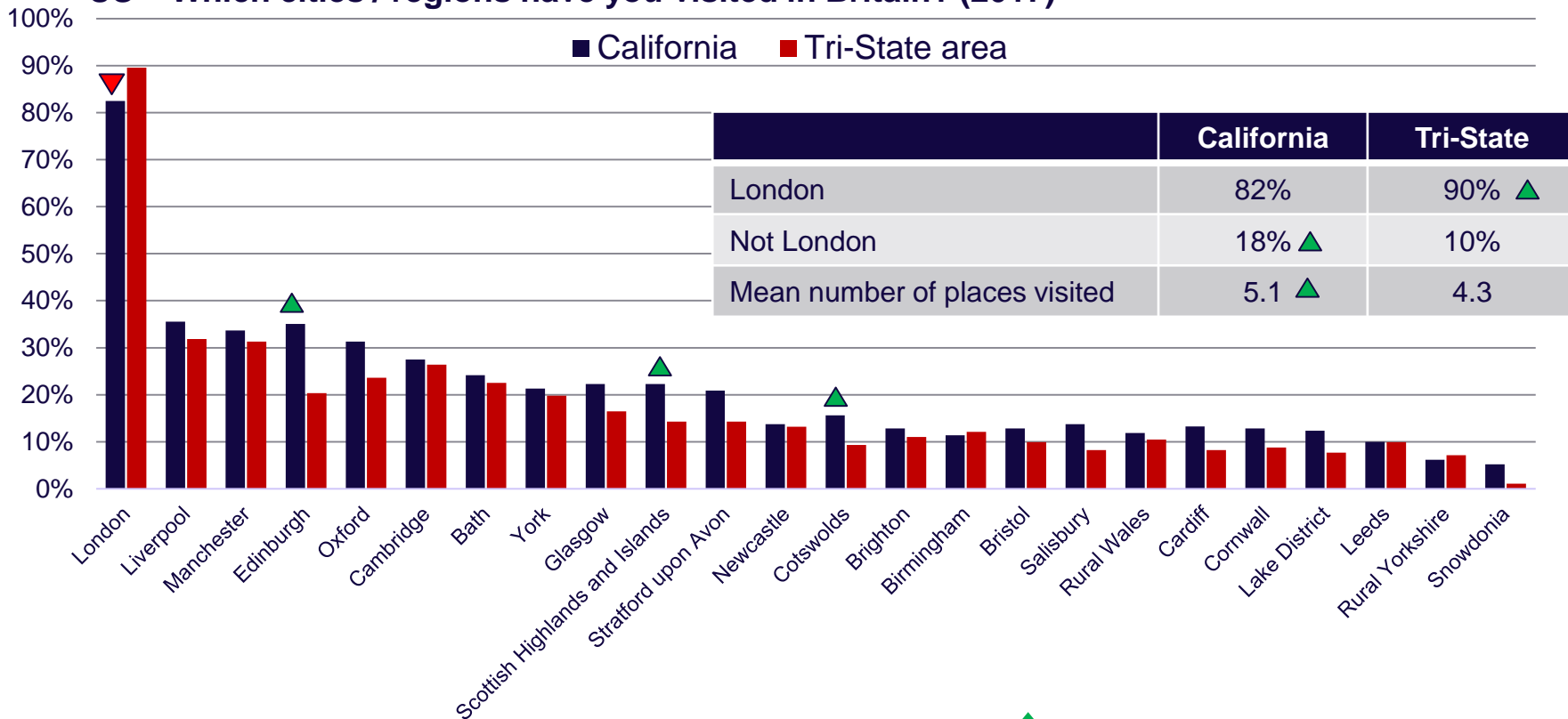
Source: VisitBritain Market and Trade Profile USA  
\* Note: This is all visitors, not just those visiting on holiday.

Source: IPS via Discover England Fund 'England's Gateways' report, 2017

## Those on the East Coast are less likely to visited cities outside London compared to their West Coast counterparts

**Considerations:** The data below suggests the West Coast should also be considered a target if travel trade partners are available. Those on the West Coast are significantly more likely to visit a higher number of places during their visit. The average number of places visited gives some indication of how many Cities you should bundle together within the proposition based on recent traveller behaviour.

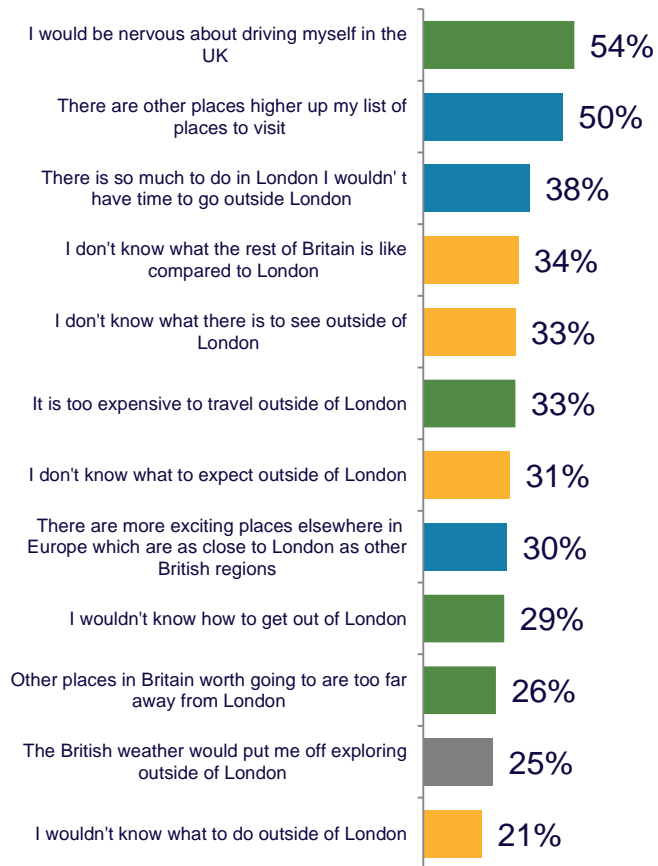
US – Which cities / regions have you visited in Britain? (2017)





# Among Americans who visited London, there were a number of barriers to going beyond London and visiting regional Britain that need to be addressed

## Barriers for not going beyond London among US travelers who visited London



## 3 Core Challenges

### 1) Transportation: An understanding of how to get to places in England

- We know globally, that visitors are **willing to travel 2-3 hours from their initial base** (typically London) to stay in another destination.
- Their preference is for train travel due to concerns about driving. But there is low awareness of how to get there.

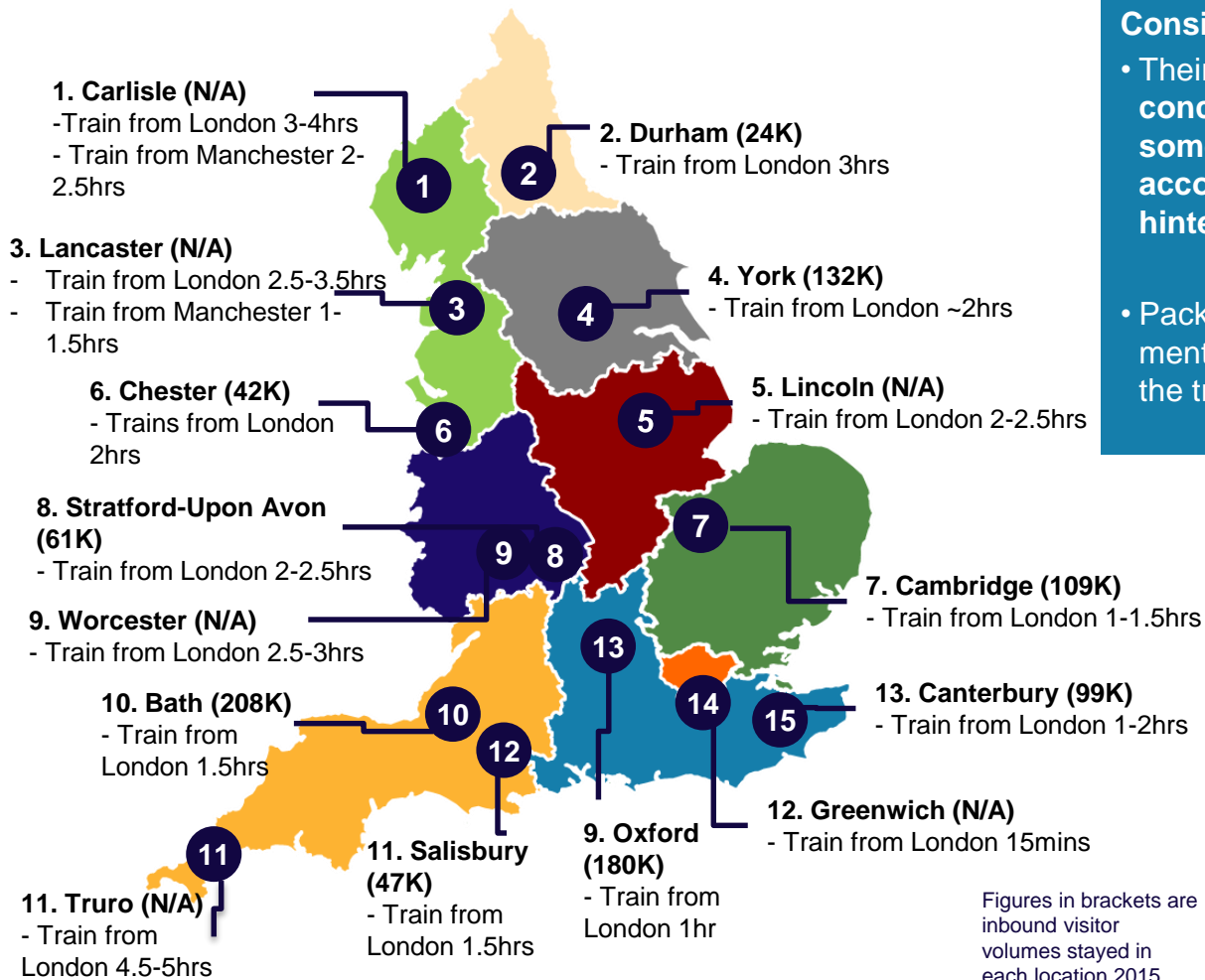
### 2) Competing with other destinations

- When considering Britain as a destination, France, Italy and Spain\* are top of mind.
- Perceptions of poor weather in England plays a factor in decision making - around 50%\* of Californians and Tri-State area residents said they were less likely to choose somewhere for an international vacation where the weather is bad.

### 3) Low awareness of regional England

- Awareness of regional England is the biggest challenge to overcome – through partnerships, there is a need to grow awareness and help inbound visitors imagine the experience they will have outside London.

# 1) Transportation: Travel via train from London should not be a barrier to visiting the majority of heritage cities as most visitors are willing to travel 2-3 hours



Figures in brackets are inbound visitor volumes stayed in each location 2015 across all markets (000's)

## Considerations:

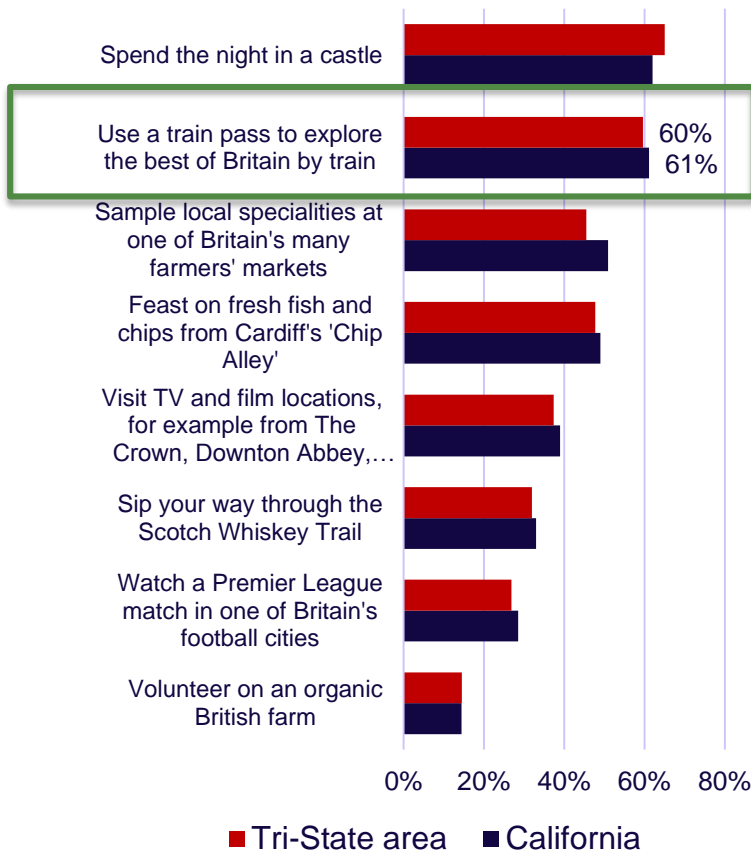
- Their preference is for train travel due to concerns about driving – this is also something to consider when choosing accommodation which may be in the hinterlands.
- Packaged tours and itineraries were also mentioned to enable them to get the most from the trip.

Useful aids to organise a 'London Plus' trip

	Recent 'London only' visitors	Recent visitors who went beyond London
Package tours with accommodation & transport from port / airport	38%	26%
Packages with all accommodation arranged	24%	27%
Rail passes	19%	21%
Packages which provide specific experiences	11%	14%
Themed tours with transport & attractions	8%	12%

# 1) Transportation: There is high appeal in using a train pass to explore the best of Britain by train, but the lack of detailed information can be a barrier

## US: Some of the things you can do in Britain, which are appealing ...



- For destinations that need to be reached using public transport (rail, bus or coach), the lack of detailed information is a barrier to international travellers:
  - They wouldn't know how to get outside of London.
  - Over-estimate journey times between destinations.
  - They don't have the confidence.
- Particularly among visitors from the US, there is a perception that travel is too expensive outside London.
- However, inbound visitors from the US who have experienced our rail system are generally positive.

### Considerations:

1. Simplify and provide targeted information (via your website) on public transport options for each target market. Heritage Cities are undertaking a rail mapping exercise already.
2. List travel times from major hubs to your destination(s).
3. Promote BritRail passes and pre-booking e.g. highlight that booking trains in advance reduces cost considerably.
4. Promote off-peak/shoulder seasons when transport is quieter.



## 2) Competing with other destinations: Those in the target demographic are more likely to consider a wider set of destinations when considering Britain but Europe is the main competitor

### When deciding to visit Britain, which other countries were on your shortlist? (US visitors to Britain)

	18-34	35-44	45-54	55-64	65+
Europe	76%	85%	84%	81%	84%
North and Central America	37%	52%	31%	34%	37%
Asia	25%	30%	22%	15%	20%
Oceania	24%	38%	20%	14%	27%
South America	21%	21%	17%	10%	18%
Middle East	14%	23%	15%	7%	16%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in consideration of destination.

- 35-44 year olds considered a wider set of destinations.
- And as such were more likely to consider other European destinations alongside Britain.

### European destination on the shortlist (US visitors to Britain)

	18-34	35-44	45-54	55-64	65+
France	42%	54%	42%	34%	35%
Italy	35%	55%	44%	32%	41%
Spain	36%	37%	29%	34%	39%
Germany	37%	41%	17%	27%	29%
Ireland	14%	20%	23%	25%	33%
Greece	19%	25%	17%	17%	16%
Switzerland	14%	25%	12%	15%	22%
Netherlands	11%	23%	13%	24%	18%
Scandinavia: Sweden, Norway, or Denmark	9%	12%	12%	19%	25%
Belgium	12%	15%	3%	14%	25%
Iceland	8%	14%	9%	17%	18%
Poland	5%	13%	7%	10%	8%
Czech Republic	4%	5%	3%	12%	12%



### 3) Awareness of regional England is the biggest challenge to overcome – inbound visitors cannot imagine the experience they will have outside London because of lack of knowledge of what is on offer

#### Main Barriers of travelling beyond London

##### 1) Low top of mind awareness of Regional England

Do not underestimate the lack of knowledge of places to visit outside London.

Among visitors planning a trip to England, London is the most mentioned place.

##### 2) Lack of understanding of what to do / expect of a holiday in Regional England

Inbound visitors find it hard to imagine the type of holiday they would have – knowledge of culture and attractions outside London is low.

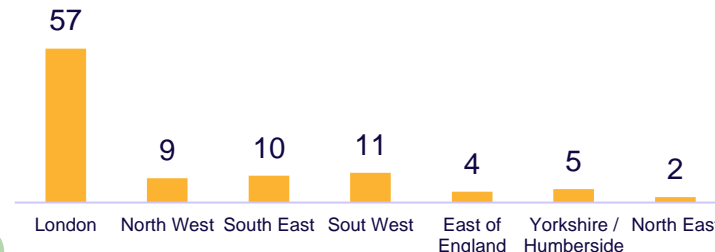
##### 3) And lastly, lack of available time for short stay visitors if starting in London

Visitors often think there is too much to do in London which discourages them from looking at other options.

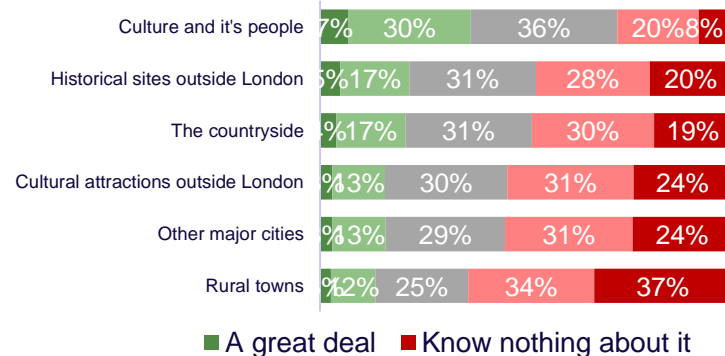
#### Considerations: Helping consumers imagine regional England

Compare England offer favourably with similar, well-known 'regional' offers in other countries.

#### US: Where in Britain would you like to visit? (% top of mind)

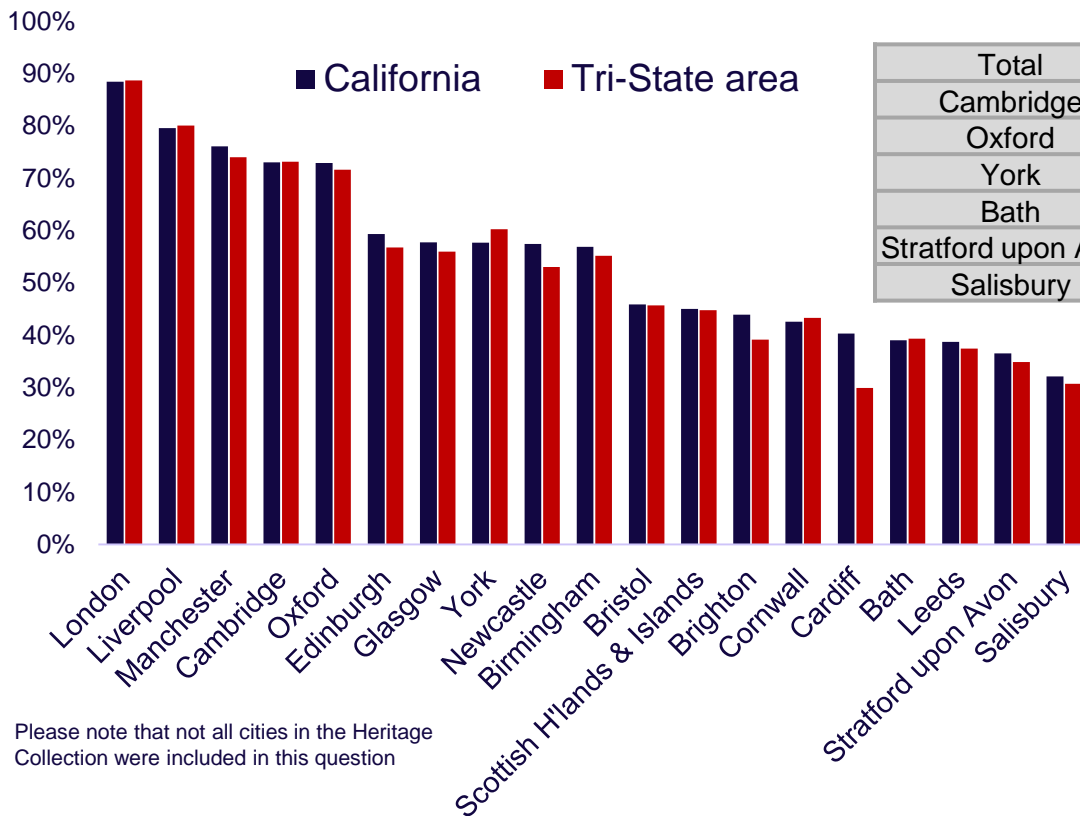


#### What do you know about Britain outside of London (all markets)?



### 3) Awareness of regional England: Cambridge and Oxford have relatively high prompted awareness but other Heritage Cities are less well known, especially among the target age group

#### Prompted awareness of British Cities



Total	18-24	25-34	35-44	45-54	55-64	65+
Cambridge	67%	56%	63%	82%	85%	91%
Oxford	64%	55%	64%	83%	84%	88%
York	48%	42%	50%	68%	73%	78%
Bath	19%	20%	24%	49%	60%	72%
Stratford upon Avon	11%	15%	22%	40%	59%	82%
Salisbury	21%	21%	23%	40%	41%	44%

#### Considerations:

- Given the relatively high awareness of Cambridge and Oxford across the target age groups and their close proximity to London, these cities could be a starting point for first time visitors to the Heritage Collection.
- We know that knowledge of regional England increases among previous visitors – who may be more likely to travel further afield.

Please note that not all cities in the Heritage Collection were included in this question



## There are some key themes to focus your communication on to grow awareness and appeal beyond London

Heritage	Countryside	Uniqueness and variety	British people and way of life	Trains, tours, and packages
<ul style="list-style-type: none"> <li>• <b>History and heritage</b> are strongly associated with Britain's holiday offer. 81% visited outside of London because of the history spread across the country.</li> <li>• 'Awe' and 'amazement' (especially from the US) are common themes but <b>it is important to get across the 'experience' and the story behind a place.</b></li> </ul>	<ul style="list-style-type: none"> <li>• 78% of those going beyond London did so because of Britain's unique and beautiful countryside.</li> <li>• <b>Countryside</b> was a major lever to convey <b>'unique, different, beautiful and relaxing</b> experiences.</li> </ul>	<ul style="list-style-type: none"> <li>• Britain's <b>unique and varied nature</b> is also appealing; 80% of those who went beyond London did so because Britain's diverse regions make for an interesting holiday.</li> <li>• Having <b>unique places to stay</b> was also a draw, a reason for 75% of those who had been outside London.</li> </ul>	<ul style="list-style-type: none"> <li>• Over two-thirds of those who went beyond London mentioned the British people as a reason for travelling outside London.</li> <li>• <b>70% wanted to meet the British people and see the British way of life</b> and 67% because they were friendly and welcoming.</li> </ul>	<ul style="list-style-type: none"> <li>• Most are <b>willing to travel 2-3 hours from their initial base</b> (typically London) to stay in another destination. Their preference is for train travel due to concerns about driving.</li> <li>• Packaged tours and itineraries were also mentioned to enable them to get the most from the trip.</li> </ul>





VisitEngland

XV

Insight

Plat. 1  
This train  
GWR service  
08:30:15

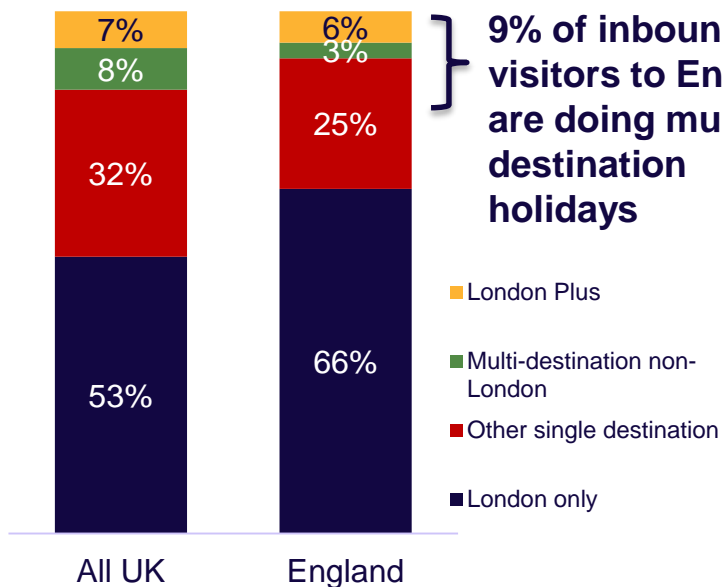
## 1b. Curation

Optimizing itineraries –  
multi-locations / duration

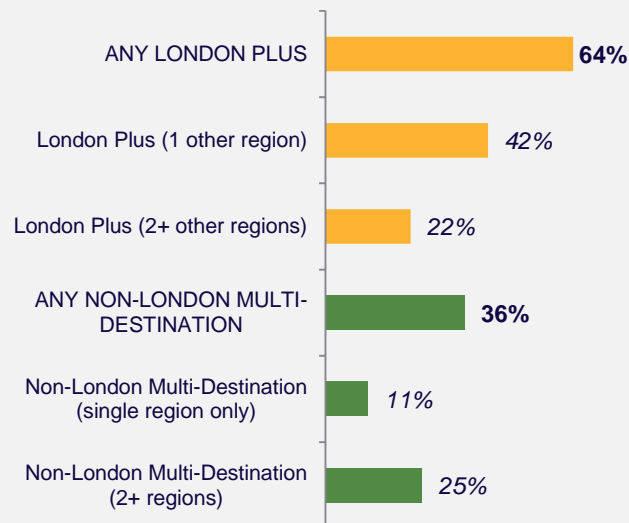
# Currently only 9% of inbound visitors across all markets to England are doing multi-destination holidays in England. Of this 9%, 47% visit 2 or more regions in England outside of London

- Whereas 15% of trips to the UK are multi-destination trips of UK destinations, only 9% are multi-destination trips to England destinations. This demonstrates the high volume of holiday multi-destination trips involving Scotland.
- Currently, those who are London Plus are more likely to have visited just one other region. While those who are non-London multi-destination trips are more likely to have visited 2 or more regions.

Share of multi-destination visits – all markets (avg. 2013-2015)



Number of regions stayed in by England multi-destination holiday visitors



Important note: Multi-destination visitors include only those who stayed overnight in more than one destination. They exclude visitors who only took day trips to other destinations from their single place of stay. A further report will be produced later in 2017 which incorporates these days trips, using questions placed on the IPS during 2016.

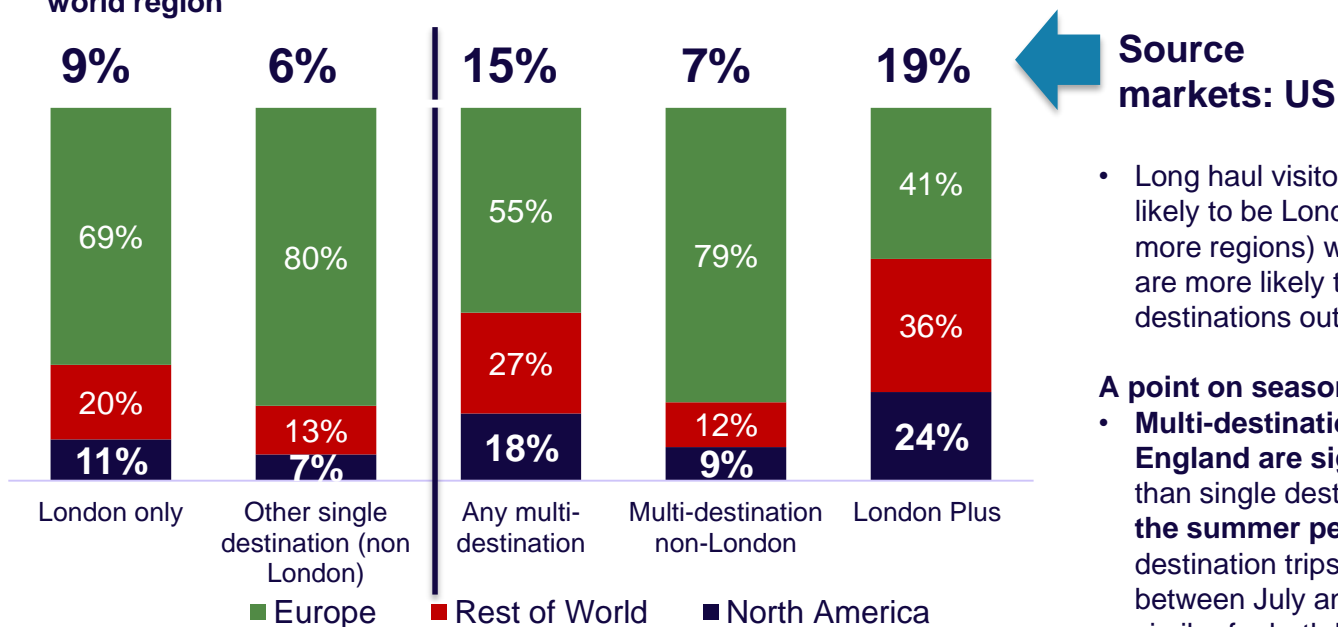
**Definitions**

- *London Plus* - a visitor who stayed in both London and at least one other destination in the UK / England for at least one night
- *Multi-destination non-London* - a visitor who stayed for at least one night in two or more destinations in the UK / England, but did NOT stay in London



Those in North America are already taking London Plus holidays, more so than are taking multi-destination holidays in England which exclude London

Source markets for multi-destination holiday trips in England by world region



- Long haul visitors (US included) are more likely to be London Plus visitors (+1 or more regions) while visitors from Europe are more likely to be visiting multi-destinations outside of London

**A point on seasonality:**

- **Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period**, with 50% of multi-destination trips to England taking place between July and September. This is similar for both London Plus (48%) and non-London multi-destination (53%) trips.

**Considerations:**

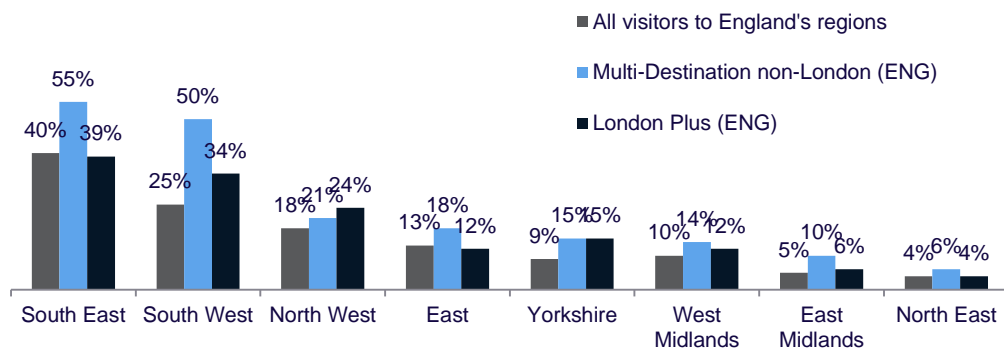
- As Heritage Cities are positioning their product as an all-round opportunity, it should consider the seasonality that is evident among those who are talking multi-destination trips within England.

- Multi-destination holiday trips are much less likely than single destination trips to take place between October and March.



# The South East and South West are the most visited regions overall – and most likely to be visited in combination

## Regions stayed in by England multi-destination holiday visitors – all markets (avg. 2013-2015)



- These two regions are even more dominant when it comes to multi-destination holiday trips. This is the case for both London Plus holiday trips and, in particular, multi-destination holiday trips which do not involve London.
- Around half of visitors on non-London multi-destination holiday trips visit both the South East and South West. Indeed, this is by far the most common regional visit combination.
- Although the South East and South West are also the most frequently stayed in regions within the London Plus market, the North West (24% of London Plus holiday trips involve a stay in this region) and to a lesser extent, Yorkshire (15%) are also well represented.

## Regional visit combinations for England's multi-destination holiday visitors (all markets) – all visiting 2 or more regions outside of London

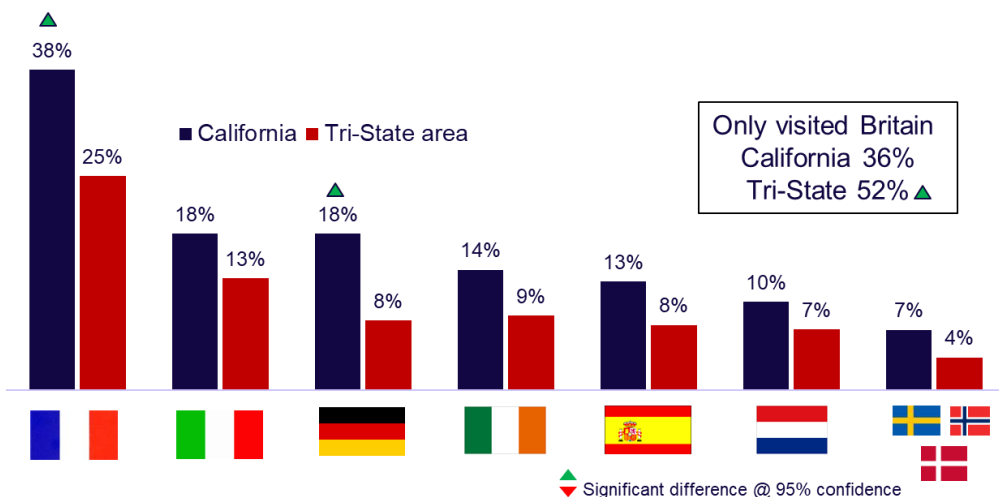
	North West (NW)	Yorkshire (YO)	West Mids	East Mids	East	South West (SW)	South East (SE)
North East	4%	4%	1%	1%	2%	2%	1%
North West	-	13%	6%	3%	5%	10%	9%
Yorkshire	-	-	4%	3%	5%	8%	7%
West Midlands	-	-	-	2%	4%	9%	9%
East Midlands	-	-	-	-	2%	3%	4%
East	-	-	-	-	-	6%	11%
South West	-	-	-	-	-	-	<b>37%</b>

### Considerations:

- Based on the above, potential product itineraries should be tested:
  - SW/SE – Bath, Salisbury, Oxford, Greenwich and Canterbury.
  - NW / YO – Carlisle, Lancaster, Chester and York.

When thinking about itineraries, Heritage Cities should also consider that a relatively high proportion of visits to Britain, especially among the target age group, involve stays in other countries

Other countries visited at the same time as Britain



- Californians are more likely to visit multiple countries as part of their trip to Britain, with France, Italy and Spain top choices. Tri-Staters are more likely to only visit Britain.
- 18-44 year olds are more likely to visit other countries at the same time as Britain.

	18-34	35-44	45-54	55-64	65+
France	36%	43%	26%	22%	27%
Italy	16%	31%	10%	8%	8%
Germany	18%	26%	5%	7%	6%
Ireland	13%	10%	12%	14%	10%
Spain	13%	15%	5%	7%	10%
Netherlands	12%	8%	12%	3%	6%
Scandinavia: Sweden, Norway, Denmark	8%	5%	3%	5%	6%
Only Britain	41%	35%	50%	46%	49%

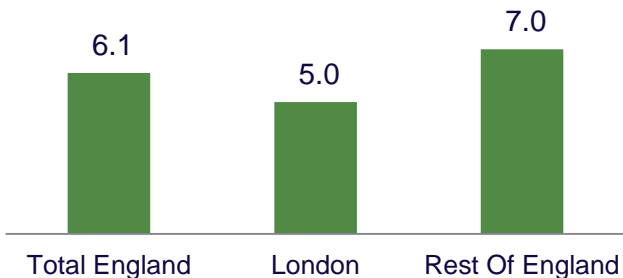
How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %  
Differences across the rows indicate differences in countries visited

**Considerations:**

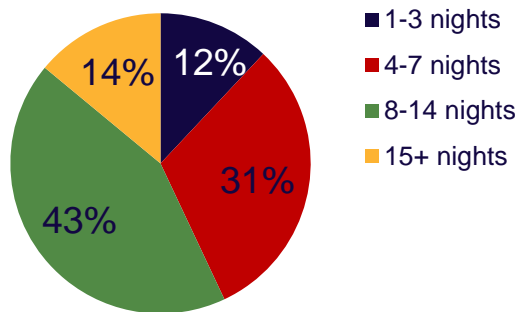
- Are there other package tours in Europe, particularly France and Italy which offer similar experiences to Heritage Cities where partnerships can be developed?

## On average, visitors to regional England stay 7 nights - and the length of stay increases among repeat visitors

**Average number of nights stayed in England – US Visitors (2015)**

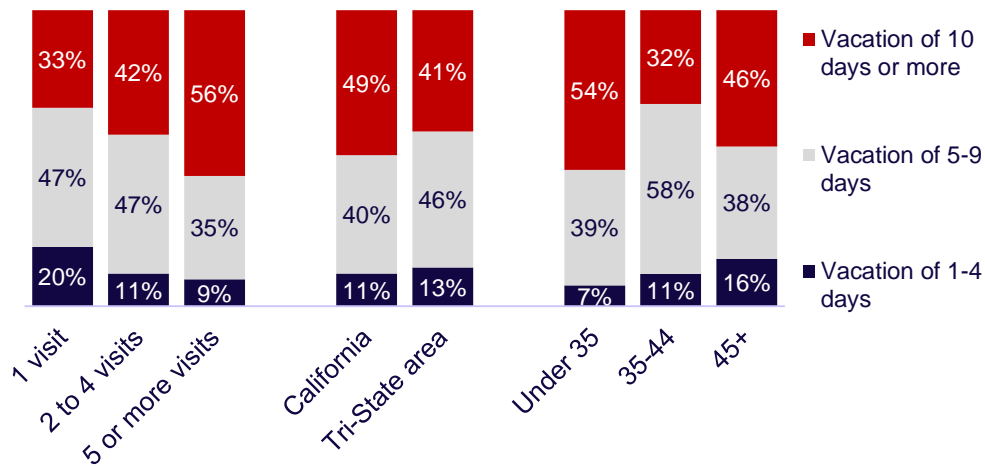


**Duration of stay in England – US Visitors (2015)**



- Visitors from California are more likely to take a longer trip compared to those from the Tri-State area.
- Repeat visitors spend more time in Britain.

### Length of vacation in Britain



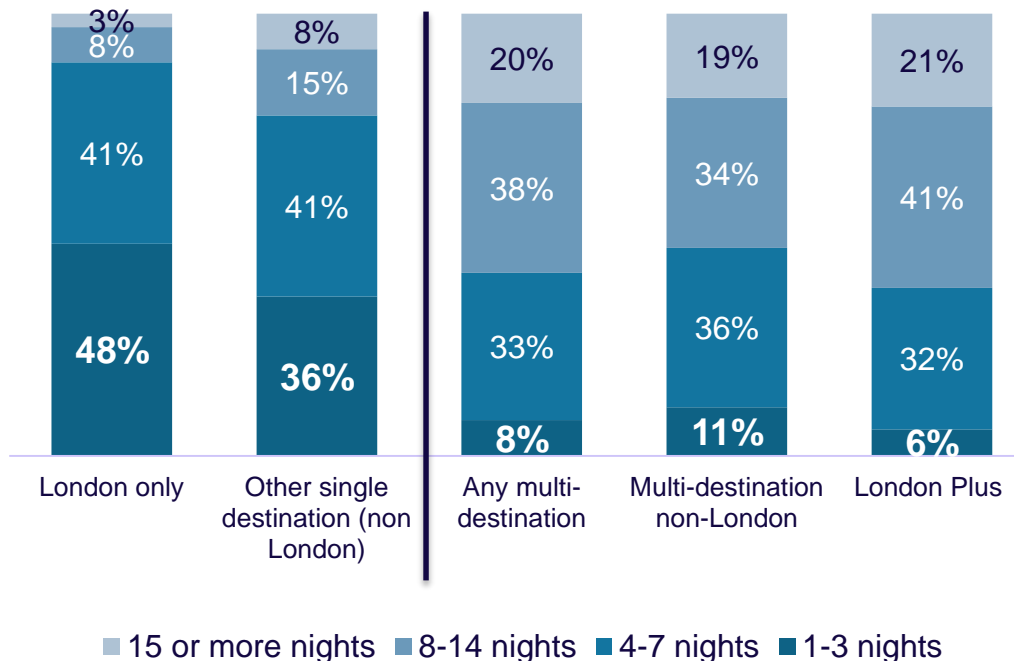
Source: Key States of America Consumer Report, June 2017

### Considerations:

- If not already being considered, different itineraries for first time visitors versus repeat visitors should be discussed.

## London Plus visitors stay the longest, with 62% spending 8 nights or more in England

Length of multi-destination holiday stays in England (% Visits – avg. 2013-2015) – all markets



- When it comes to the length of time spent in England, London Plus holiday visitors stay the longest, with 62% spending 8 nights or more in England.
- London Plus visitors stay longer than non-London multi-destination visitors (only 53% of these visitors staying 8 nights or more).
- Conversely, almost half (48%) of visitors on a London only holiday trip stay only 1-3 nights. This is significantly higher than those on a single destination holiday trip to a destination outside of London (36%).





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## 1c. Curation

**Optimising itineraries -  
activities / experiences**

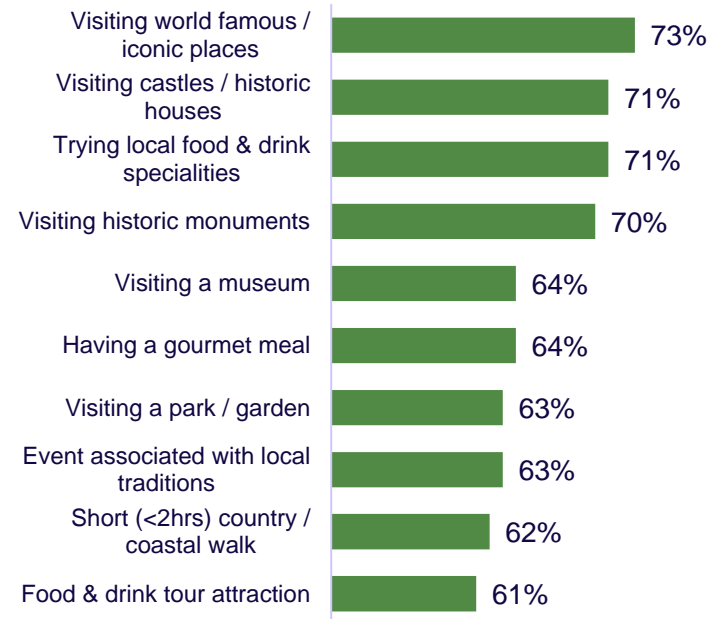
It is a known fact that history and heritage are key drivers for visitation to England and is a key focus for the product – but some US visitors also want experiences which deliver a sense of adventure and / or challenge

- The most considered activities are also the strongest drivers of visitation – a good fit with the Heritage Cities product.
- US visitors are more **likely to want a challenge** and / or action.
- **Food and drink are relatively key**, but in the sense of local specialities (gourmet meals is only an average driver).

### US: Consideration of Activity Clusters on holiday to England

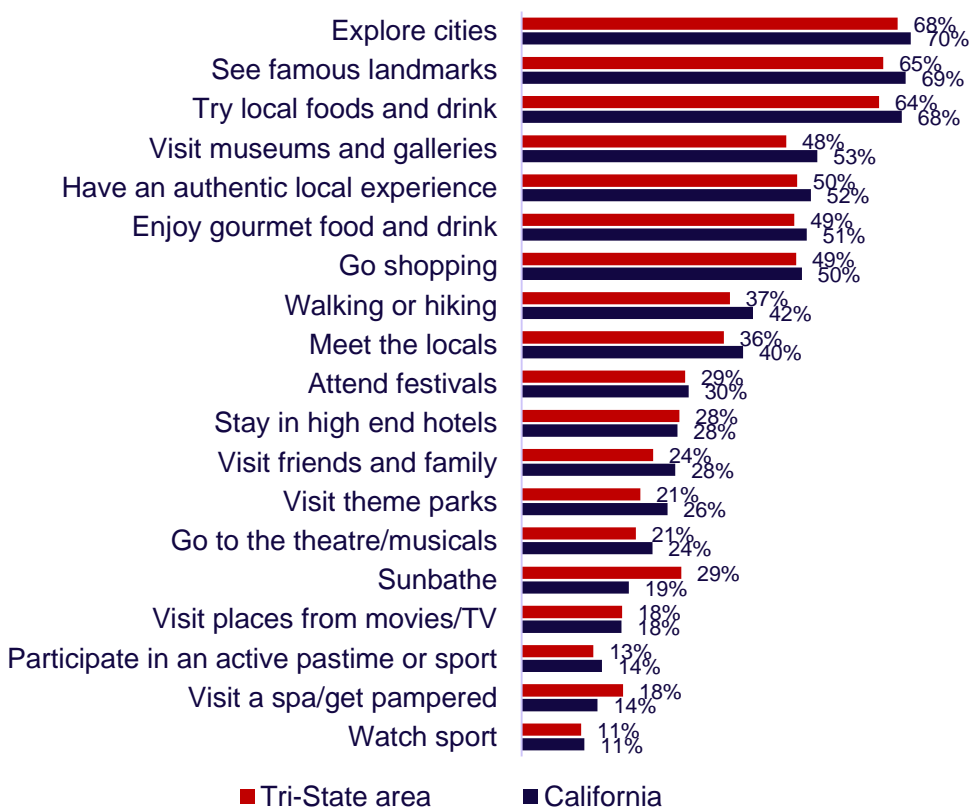
	DEFINITELY/ VERY LIKELY	INDEX CONSIDERATION
Visiting famous / iconic attractions / places	72%	88
Exploring history and heritage	71%	96
Experience city life	67%	94
Experiencing rural life & scenery	61%	100
Outdoor leisure pursuits	60%	105
Attending cultural music / sports events	56%	104
Challenge and / or action	37%	120

### US: Most considered activities on holiday to England



The types of activities preferred whilst on holiday do not differ too much between East and West Coast residents of the US – exploring cities, visiting famous landmarks and trying local food and drink are top preferences

### US: Preferred international vacation activities



Please note a slightly different list of vacation activities was used in this study compared to that used in the IPS study

Source: Key States of America Consumer Report, June 2017

### Considerations:

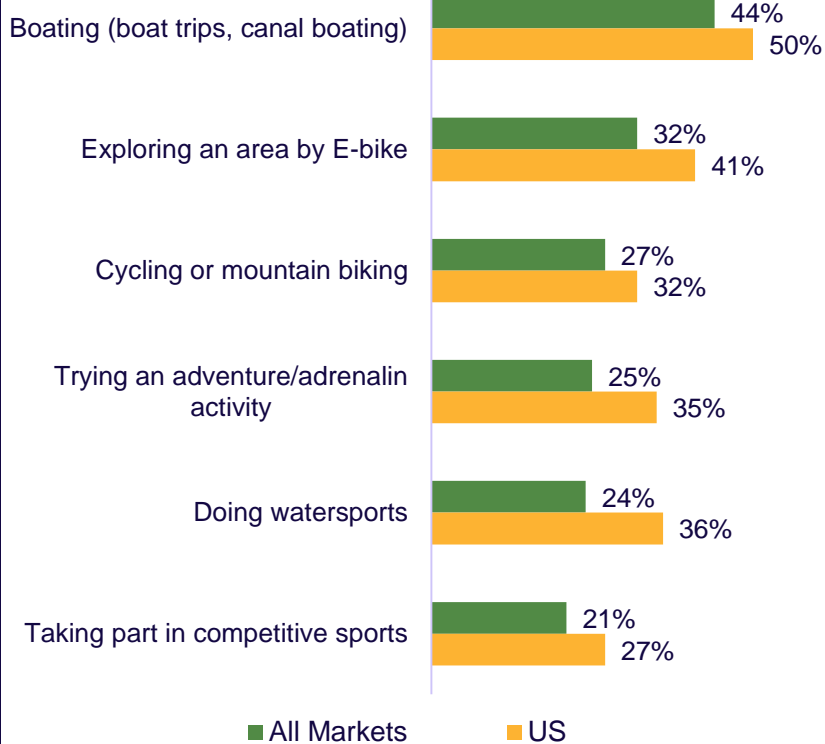
- While relatively low on the list being pampered is something that appeals more to those in the Tri-State area and younger audiences. Going shopping is also more appealing to younger audiences.
- Consideration of relaxation activities within the package / or accommodation may be something to test further.

	Under 35	35-44	45+
Explore cities	61%	61%	77%
See famous landmarks	52%	57%	80%
Try local foods and drink	54%	58%	77%
Visit museums and galleries	39%	44%	60%
Have an authentic local experience	38%	47%	60%
Enjoy gourmet food and drink	43%	49%	55%
Go shopping	56%	51%	46%
Walking or hiking	38%	41%	40%
Meet the locals	32%	31%	45%
Attend festivals	30%	32%	29%
Stay in high end hotels	29%	30%	27%
Visit friends and family	31%	29%	21%
Sunbathe	23%	28%	23%
Visit theme parks	38%	32%	12%
Go to the theatre/musicals	24%	23%	21%
Visit places from movies/TV	25%	21%	13%
Visit a spa/get pampered	20%	19%	12%
Participate in an active pastime or sport	17%	17%	10%
Watch sport	17%	15%	6%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in preference to these activities.

## Challenge / active experiences: 37% of Americans are likely to consider challenge / action activities when on holiday – compared to the market average, Americans over-index on many active activities

### Consideration of active activities – US market:



- Active activities are popular with the younger segment and have particular appeal in the US market.
- A sense of being challenged could fit well with the Heritage Cities offer - for example, a challenge of visiting multiple historic locations / cities. The AR technology can also play a role in offering a challenge (see later slides).

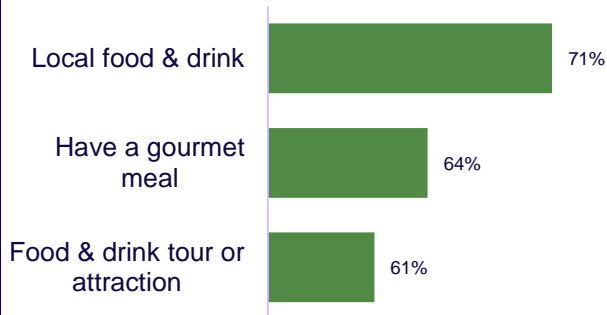
### Considerations:

- We cannot assume that just because the American market is more pre-disposed to active activities that this would fit well with the Heritage Cities product.
  - Specific activities available within the local area should be tested alongside the Heritage Cities offer to understand their fit together.
- The current research available is limited to activities rather than other experiences that can offer a sense of being challenged.
  - This concept should also be tested either through specific experiences or within marketing messaging testing.



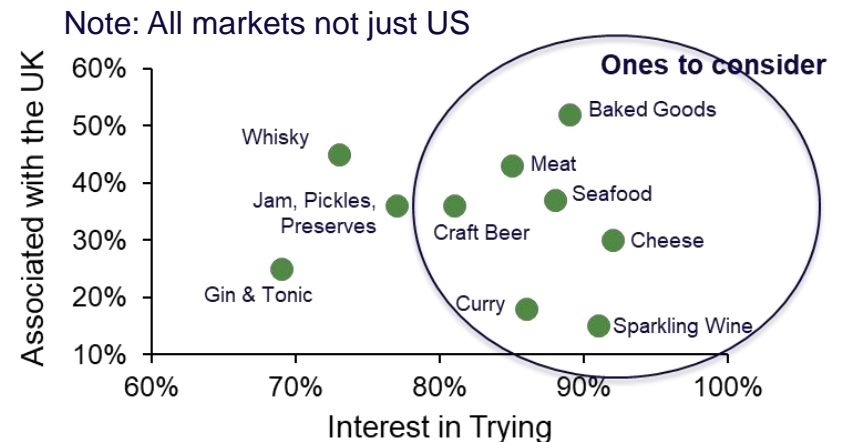
## Food Experiences: Food & drink is rarely the main reason to visit England\* but can play a significant supporting role

### Consideration of Food experiences – US market:



- **Trying British dishes** is of interest, particularly fish & chips (56% extremely/very interested), roast dinners (53%), full English breakfasts (52%), and afternoon teas (46%).
- Typically, higher interest comes from the US when compared to the global average.

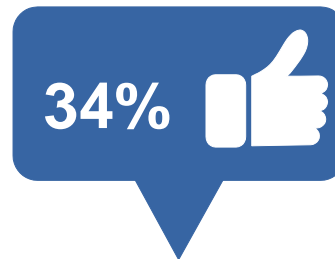
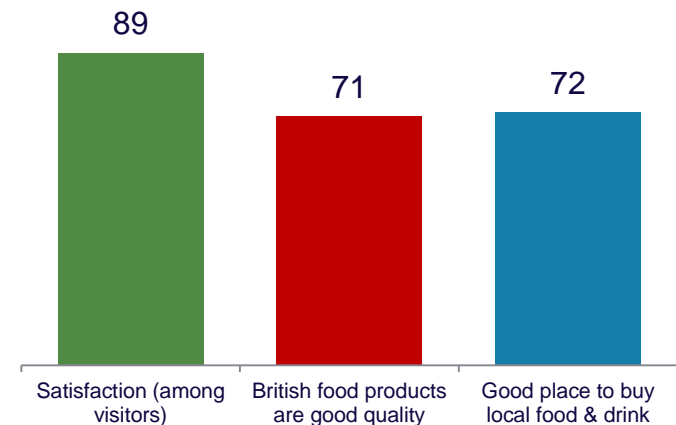
- There is an appetite to try food & drink related activities among those considering visiting England.
- There is most interest across all target markets in trying local food & drink specialities compared to other food experiences – and the **low association of some of these could be expressed as a unique experience:**



Visit Britain have a site dedicated to promoting Food Hubs and Itineraries for the trade industry - <https://trade.visitbritain.com/destination-uk/food-and-drink/>

Food Experiences (cont.): The US audience generally has good perceptions of food in England. But they do look at reviews so any suggested food experiences promoted within the package need to be of good quality

### Satisfaction with Food & drink among US visitors to England (%)



- 34% of Americans have you **used social media to look for recommendations for places to eat or drink** whilst on holiday. This is higher than the global average 30%.



- 68% of Americans have used a **smartphone to access reviews about places to eat or drink**. This is higher than the global average of 54%.

### Considerations:

- Food experiences certainly should play a supporting role in the Heritage Cities offer.
- Given the American's high use of technology to find places and access reviews, if not already considered, helping visitors find unique or the best places to sample local food and drink should be considered.

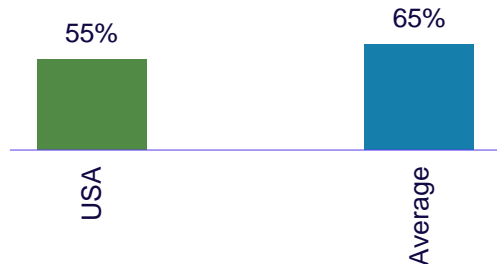
## There is a real desire to experience new and different experiences among Americans - this is not only in terms of the activities but perhaps types of accommodation in the offer

- New and different experiences are an important part of international vacations for both those in Tri-State area and California (44%/45%).
- Spending the night in a castle and exploring Britain by train are the most attractive experiences from the batch of experiences tested. Travelers in the Tri-State area are more likely to say farmers' markets are appealing.

### Future Traveler Trend – The Pursuit of Real

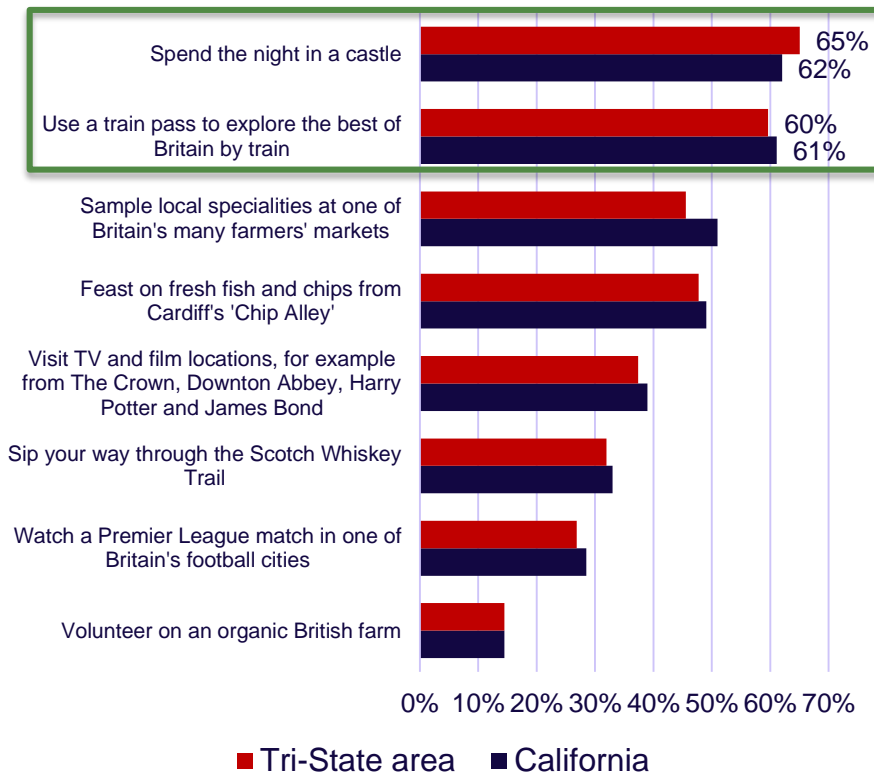
Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their “tourist” stamp and experience their destination like a local instead.

“When I go on holiday, the most important thing for me is to experience the authentic culture of a place” % who agree strongly or agree



Source: Discover England Fund Travel Trade Research, 2016

### US: Some of the things you can do in Britain, which are appealing ...



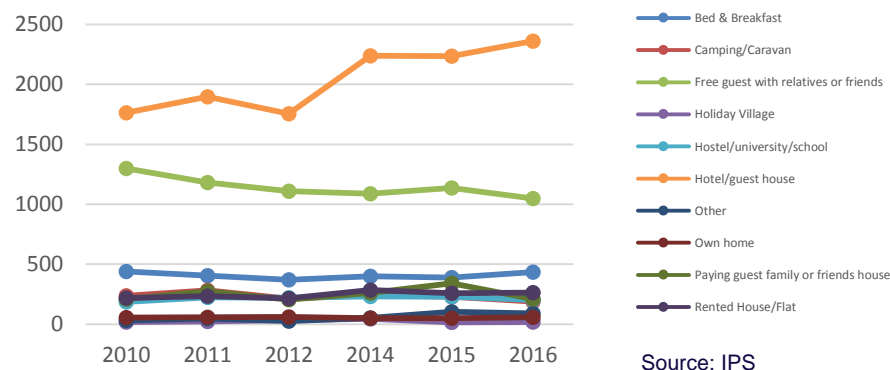
Source: Key States of America Consumer Report, June 2017

# Reducing the hassle of finding good quality accommodation for visitors is key

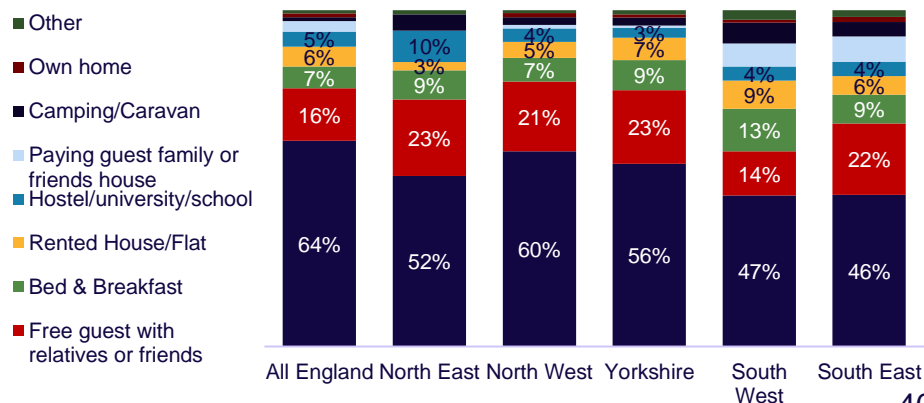
## Key Challenges:

- From a traveller perspective, **accommodation is not seen a key motivating factor and can be a hassle to find:**
- Accommodation is not a motivator for visiting England; only 16% of visitors see the variety & quality of accommodation as a motivator.
- Overall trend for England holiday visits (excluding London) shows the biggest increase is in hotels/guest houses.
- Potential for growth in alternative accommodation – bed and breakfast, camping etc.

Accommodation Trends (outside London) – all markets



Accommodation Type – All England and Regions (2016)









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## 2. Interpretation

## Interpretation: Overall Aim

This strand will focus on storytelling, both pre- and post-arrival, animating the product and enhancing the tools and developing formats that will be deployed to communicate the Collection to the trade and consumers.

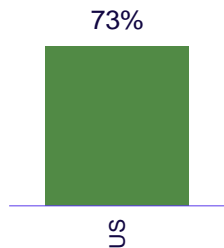
# The Heritage Cities concept sits well with future travel trends and should resonate well with Americans given they are a highly developed tech market

**Interpretation** – *Storytelling and technology that will be used to define, interpret and communicate most significant moments in history*

## Future Traveler Trend – The Leisure Upgrade

- Skill seeking future travellers will prefer tourism products that combine fun and an opportunity to learn

“Entertainment should be about learning new things as much as simply having fun” | % who agree strongly or agree



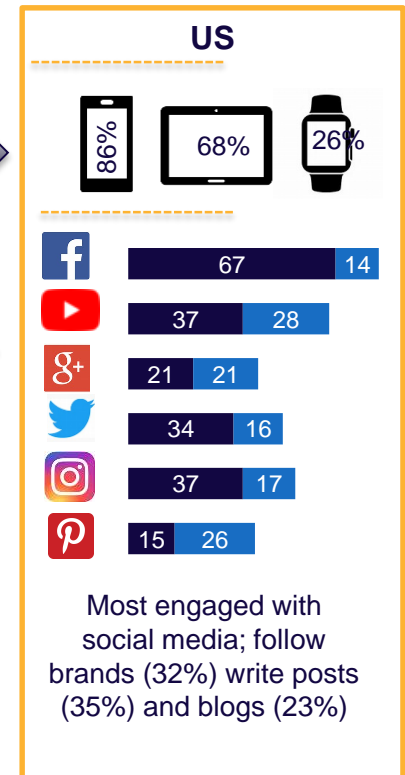
**“Don’t put everything into a glass box and expect people to come, because they will just be bored. If you look at the average consumer today, they are more demanding, more sophisticated, more culturally aware, have travelled further. There is built heritage, natural heritage and cultural heritage. Cultural heritage is all about people and food and wine and that one has become more important than the others. Culture is no longer dead, the cultural is alive and that experience economy is driving everything”.**

IAN YEOMAN, TOURISM FUTURIST

Source: The Future Travel Journey

### Tech ownership

Smart phones are almost universal, over half have a tablet. Smartwatches are also prevalent in US.



### Social Media Usage

■ Daily ■ Weekly

Facebook and YouTube dominate

US has much higher usage of all social media channels.



Source: Technology and Social Media, 2016



# In the US, staying connected and the use of technology is now an accepted part of the holiday experience



- Social media is not widely used during the holiday for recommendations and planning, suggesting that this information is sought from destination and attraction websites, specialist review sites etc.

### Considerations:

- As previously mentioned, helping visitors find unique or the best places to sample local food and drink should be considered within the app – as well as location based information and promotions.

**Geo-Tourist** is an audio tour site and app that uses GPS data to play informative audio clips around touristic routes and advertise nearby offers and services to users



*“I can’t think of anyone who wouldn’t want to be given a promotion like free drinks at the bar when they are nearby. I think it’s helpful as well if apps or companies **let you know what activities and landmarks are around you during your stay so that you don’t miss out on anything**”*  
 MALE, 34, US

Source: Technology and Social Media, 2016

AR is a hot topic not just in the tourism industry, with many applications launching or in the pipeline. Gamification is used in some of these apps – which may resonate with the US audience given they want a sense of challenge

- The success of Pokémon Go is well known – but part of its success could be attributed to the sense of challenge, fun and social dynamic it brings to its users. Others inside and outside the tourism industry are embedding gamification within their apps (see below).
- Restaurants, bars and other catering facilities can use AR solutions for their benefit in several ways: i.e.
  - brand new restaurant menus with an interactive 360-view of each dish, correct portion size and ingredients.
  - using Pokémon Go to lure clients in.
  - navigation help with special mobile apps using AR to provide information about restaurants, cafes and bars nearby.



**Amstel**, a Dutch beer brand, has launched an innovative sampling campaign using an AR app called "Snatch." Snatch is a treasure hunt gaming app, and if you win the game, your prize is 10,000 free pints of Amstel beer, redeemable at Mitchell & Butler pubs.

**Seek**, is an augmented reality content sharing platform. Use the map to find AR content in the world around you. While searching the map you can also win prizes like gift cards, VR gear and TVs etc. It also allows you to share your AR experiences with friends.



**The Village of Ashcroft** partnered with augmented reality company, **QuestUpon**, to create an original walking tour for people to experience the authentic stories of this official hot spot of Canada.



## Feedback so far on the Heritage Cities AR app from Apple Store and Google Store users

*"Incredibly interesting app. Didn't know about Chester's crazy history before I got this app, can't wait to head to another city to try this out again!"*

*"The app doesn't properly explain how to use augmented reality part, so I found myself randomly tapping different areas to see if anything worked. Nothing I tried actually did. Disappointed"*



*"Amazing app! You can learn a lot of things about British history. Easy to use and beautiful design"*

*"It needs work. Not all the scans worked for me, because they were paintings in a museum and the lighting wasn't bright enough. An option to see the material without the scan would be nice. Also, audio would be better than text (it's almost expected these days), especially for those of us whose eyesight isn't what it was"*

## There are many sources in the public domain which highlight the key components of any travel app – highlighting links to other apps which have already been developed

Suggested aspects for a travel app:

- 1) **Trip planner** - an organizer for a whole trip, where the user can store tickets, schedules, destinations, contacts, etc. Top examples here could be [Triplt](#) and [Google Trips](#).
- 2) **Hotel booking**: find and book the cheapest, cosiest and most suitable hotel, hostel or apartment. The market is dominated by giants like [Booking.com](#), [AirBnB](#), and [Trivago](#), who provide their apps for free. Therefore all that is required is a map with geotagging/geolocation and a hotel booking app.
- 3) **Ticket booking**: global players like [KAYAK](#), [Skyscanner](#) and [Expedia](#) rule the parade here. But this is also the most competitive segment, as nearly every major transportation company has its own app. The apps need access to the data of transportation companies ([FlightStats](#) or [Uber](#) APIs). However, this is a point where local players might be better, because of the better understanding of the domestic transportation system, especially buses and trains.
- 4) **Reviews and feedback**: relevant not only for the places to stay but also for the places the user would like to visit and services they are going to use. The best example here might be the [TripAdvisor](#) app. TripAdvisor provides their rating content for free.
- 5) **Weather forecast**: minor, but nearly a “must have” feature in an app. There are hundreds of weather apps, the best way to introduce such feature into an app is to incorporate any of the available free apps.
- 6) **Maps and geolocation**: a backbone of every travel app. There are well known (default) players like Google maps and Apple maps, plus smaller ones, but with their distinctive features like [HERE WeGo](#) and [Maps.me](#). The available comprehensive [Google maps](#), [SDK](#), [Facebook](#) and [Google Places](#) apps are provided for free. One more “must have” feature – it has to work offline.
- 7) **Guides and spot finders**: one more point where locals have an advantage over huge players. Use Google maps app, put some unusual places in your city on it, describe them, add some cool interesting story about it and some photos/videos. Et voila, you have a ready to go travel app.
- 8) **Socializing**: adding a social component to your app is a great idea. Starting from trivial sharing and posting possibilities through to integration with preferred social networks through apps like Facebook or Instagram. Or adding a comprehensive messaging or friend-finding feature on your own.





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3a. Distribution

- Travel Trade Partnerships

## Distribution: Overall Aim

This strand will focus on the distribution and promotion of our new product via the trade and direct to consumers via existing promotional platforms. The focus will be on channels and activities that are appropriate to younger US audiences.

This SWOT is based on travel trade views and how they perceive potential inbound travellers feel about England. As such, they have potential to encourage or discourage visitors.

# Travel Trade – SWOT

Strengths

- History & Heritage are key interests
- The chance to experience local culture & lifestyle
- Scenery & countryside – hotels in the hinterland
- Interest in rural England and the English way of life
- Personalisation is a growing trend

Weaknesses

- London dominates as destination
- Lack of awareness beyond London, esp. North
- Accommodation is seen as a 'fundamental' barrier (see following)
- Transport concerns (see following)
- Perception of English food is negative
- Scotland and Ireland are competitors in this context with strong appeal
- England seen as expensive for accommodation, food attractions & travel

- Availability & capacity – hotels don't provide fixed rates and allocations in advance
- Poor quality and excessive cost
- Lack of flexible/twin rooms
- Self-catering difficult to book
- Poor service standards and welcome
- Lack of regional flights
- Seasonal lack of ferries
- Nervousness of left-hand-drive,
- Rail issues (price, gaps, trains etc.)

"London is both a blessing and a curse" US operator

Opportunities

- Brexit – short term opportunity (favourable exchange rate)
- Millennials – time poor and happy to be 'packaged'
- Culinary experiences – offering distinctly English food
- Offer distinctive accommodation (i.e. castles)
- More developing of the existing offer rather than radical new (see following)
- Clear transport information and support
- Raise awareness through joint marketing

- Trade rates
- Price stability
- Release periods on room allocations
- Centralised booking mechanisms
- Single point of contact
- Make use of DMCs
- Greater language capability among handlers/guides (French & German)

Threats

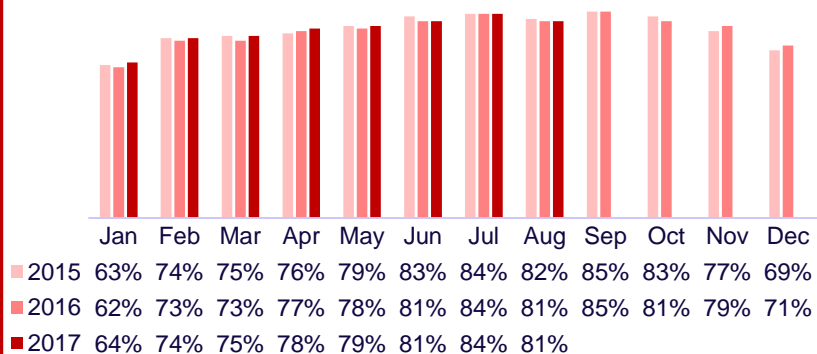
- Unwilling to promote a product with unproven demand
- Midlands and North seen as difficult to sell
- Past bad experience of trying to sell Central and Northern England
- London and the South dominate - good for some Historic Cities but not for others
- Good transport is required with regional access

"The northern areas of England are beautiful and have a lot to offer. The problem is that there is no consumer marketing and no help to provide inspiration to potential visitors".

# Accommodation is seen as a barrier for development of England's tourism by the Travel Trade

## Overall Availability & Capacity

Occupancy data shows England running at 81% - 85% capacity over the summer months, leaving little opportunity for additional bookings and supporting the Travel Trade concerns around availability in Peak season.



Bed space occupancy (typically at 60% or less) suggest some scope for increasing group size (family/couples), but perhaps also reflect the Travel Trade view that there is a lack of flexible/twin rooms.

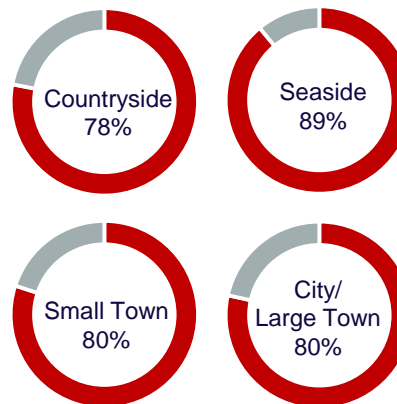
Travel trade say there is a lack of willingness from many hotels to provide fixed rates and allocations more than 6 months in advance.

## Availability & Capacity by type and location

Highest August occupancy areas:

<b>South West</b>	<b>87%</b>
<b>South East</b>	<b>83%</b>
<b>Greater London</b>	<b>82%</b>

This amplifies the Travel Trade concern as they tend to favour the South of England.



August occupancy highlights a challenge particularly for seaside accommodation.

The Travel Trade finds it difficult to book smaller accommodation (self-catering, B&B, small hotels etc.).



## Accommodation is seen as a barrier for development of England's tourism by the Travel Trade

### Travel Trade have concerns around Quality and Value of Accommodation

“Ban carpets in bathrooms, it is possibly the greatest pet hate.”

Accommodation in England is perceived to be  
**Poor quality**  
**Expensive**  
**Poor service standards and welcome**  
**Perception of food quality**

“There have been programme ideas who never made it beyond the idea stage as the required accommodation was not available.”

While these views may not reflect in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England Opportunity.

### Actions

The Travel Trade put forward a number of potential actions to address the accommodation concerns:

- Offer distinctive accommodation (i.e. castles)
- Building access to additional (alternative) accommodation types should both address the desire for authentic experiences and the capacity challenge
- Trade rates
- Price stability
- Release periods on room allocations
- Centralised booking mechanisms e.g. for smaller/specialised accommodation – B&B's, cottages
- Focus on off-peak, whilst Peak capacity remains an issue

## England's Transport and Accessibility cause concern in the Travel Trade

### Travel Trade have concerns around transport & accessibility particularly to regional England

These concerns span all forms of transport:

- **Lack of regional flights**
- **Nervousness of left-hand-drive**
- **Rail concerns** (prices, train quality & comfort, gaps in geographic coverage)

While these views may not be reflected in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England opportunity and will not help with building traveller confidence.

Source: DEF Travel Trade Research June 2017

### Actions

The “UK Rail Revolution” put forward by EuroMonitor at WTM 2017 reference of medium-term projects that have potential to improve rail travel for visitors and, importantly act as positive PR for trade and potential, travellers:

#### Key (Proposed) Milestones for Rail Developments in the UK



Source: Euromonitor International

### Short-term actions

- Better accessible travel information for trade and travellers (routes, journey times, ticketing etc.).
- Greater language capability at gateways and key hubs.
- Integrated travel solutions focused on regional accessibility.
- Provide reasonable price options.

Source: Euromonitor 100 Cities WTM 2017

## Online Travel Agents are an increasingly important part of the travel trade

- OTAs have grown over recent years and new brands and propositions have been launched. Airbnb has over 3m listings, Booking.com has nearly doubled in size since 2015. Consolidation has led to Expedia and Priceline, Orbitz Worldwide and Travelocity dominating (they control 95% of the US market).
- Most operate on global or at least multi-market platforms. Technology drives the offer; app solutions are increasingly popular.
- With an ethos of ‘making travel easier’ they are looking to incorporate a wider range of travel activities into their portfolios.

### Challenges to Address

Highlighted by OTAs as issues to be resolved:

- Lack of understanding among DMOs and hotel chains in how OTAs operate.
- Reluctance of some DMOs and chain hotels to share commission with OTAs.
- Attractions do not always understand how to sell online and/or work on short lead times.
- Rail & air challenges.

### Actions

Increase the amount of product bookable online.

Create better linkage between destinations e.g. multi-location tours.

Package the regional air options:

- competitive prices
- short transfer times
- provide clear info on travel times

Perceived opportunity around short, bookable trips e.g.

- 4-5 day coach trips from & back to London

### The Traveller View

OTA’s play a significant role in enabling travellers to be confident with the price they are paying.

	US
I often compare prices from multiple OTA websites	79%
OTAs are a good way of finding a destination within my budget	75%
Best way of getting the lowest price	66%

% Strongly agree/agree about booking travel though OTAs

OTA’s are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low.

## 3b. Distribution

- **Direct with Customers**



The planning stages: There are four stages to the planning process; 60% of visitors from the US start to think about their trip more than 6 months in advance

The planning process:

There are four stages to the planning process (%):

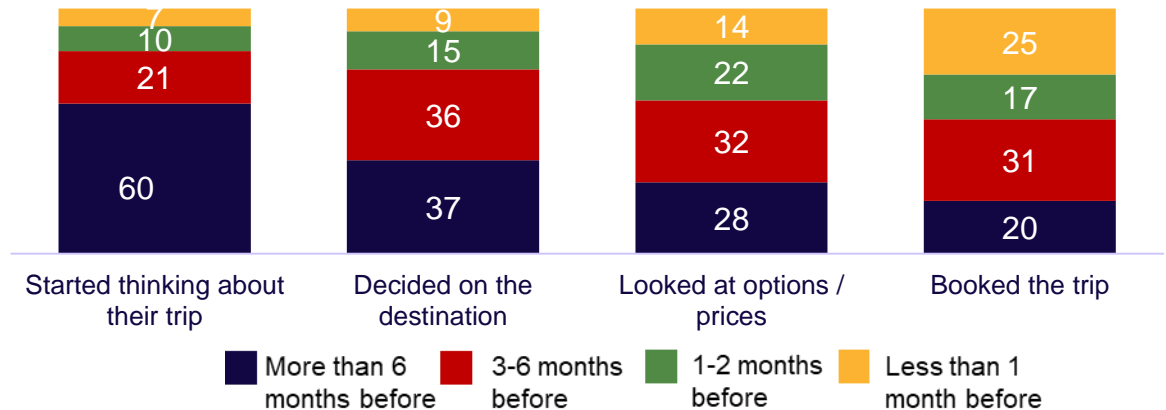


For each stage, it skews to one individual being involved – this is fairly unique to the US market.

There is definitely a gender imbalance when it comes to the final decision making, with 58% of males saying they make the final choice versus 45% of women

Length of time for each stage (%) – US market:

60% of visitors from the US start to think about their trip more than 6 months in advance, with most deciding on the destination more than 3 months in advance. Timing of marketing campaigns will need to reflect this.

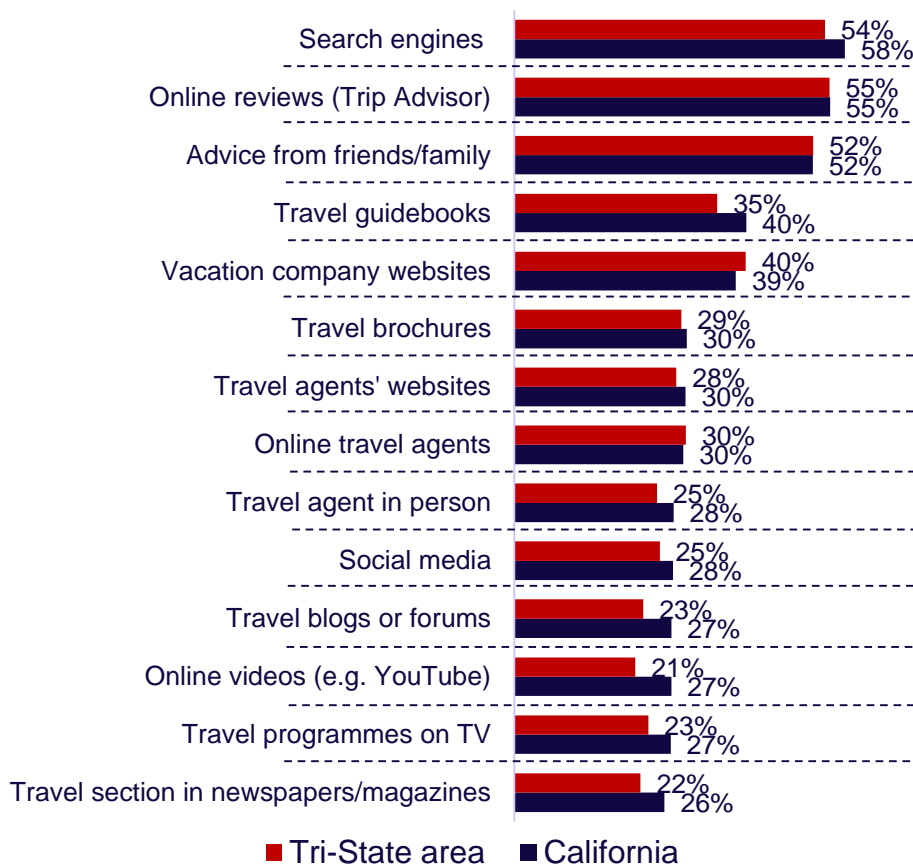




## Key influencers: Online and offline influences both play a role in helping Americans plan their vacation – online reviews and word of mouth are key

- When planning their trip, younger people are more likely to use social media, online videos, websites and blogs

### Which of these do you use to help plan an international vacation?



	18-24	25-34	35-44	45-54	55-64	65+
Search engines (e.g. Google)	54%	44%	56%	61%	66%	53%
Advice from friends/family	54%	46%	48%	59%	56%	51%
Online reviews (e.g. Trip Advisor)	46%	52%	52%	62%	62%	52%
Social media	39%	43%	36%	19%	11%	5%
Vacation company websites	37%	44%	41%	37%	38%	40%
Online videos (e.g. YouTube)	32%	31%	34%	21%	14%	8%
Travel agents' websites	31%	47%	39%	20%	17%	13%
Travel blogs or forums	29%	25%	30%	25%	21%	15%
Online travel agents	29%	46%	35%	24%	19%	19%
Travel brochures	28%	24%	29%	28%	33%	41%
Travel guidebooks	28%	34%	39%	36%	44%	49%
Travel agent in person	21%	32%	34%	20%	21%	29%
Travel programmes on TV	16%	26%	28%	24%	30%	25%
Travel section in newspapers/magazines	14%	19%	22%	22%	35%	38%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in associations

Different sources are used throughout the decision making process – Word of mouth is most influential when deciding on the destination but tourism board sites play an important role when deciding what to do at the destination

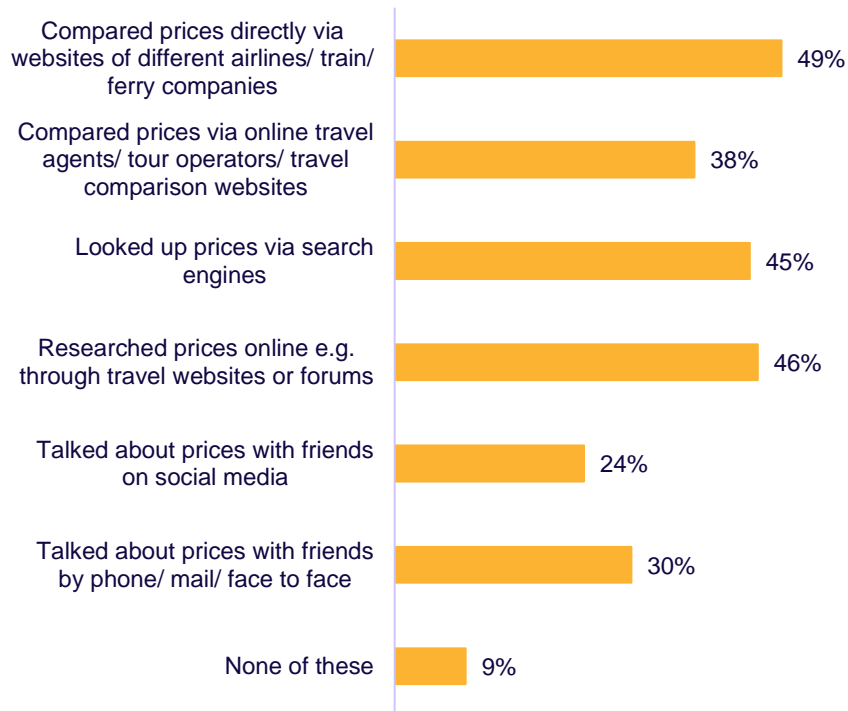
	<b>STAGE 1: INSPIRATION –</b> Things that might inspire you or give you ideas before you have decided which country/ies to visit	<b>STAGE 2: MAKING THE DECISION –</b> Deciding on a destination or series of destinations for your journey	<b>STAGE 3: MAKING THE 'BIG' BOOKINGS -</b> Booking flights/transport and accommodation	<b>STAGE 4: MAKING THE ITINERARY -</b> Giving you ideas and helping you plan and book the things to do while you are there	<b>STAGE 5: DAILY INSPIRATION AND SUPPORT ON THE TRIP -</b> Giving you ideas or helping you get the most while you are on your holiday
Friends, family and colleagues I know	56%	53%	34%	45%	47%
Online reviews (e.g. Tripadvisor)	36%	42%	38%	40%	37%
Specific websites (e.g. airline sites, hotel sites, train sites).	34%	39%	59%	36%	29%
All-in-one travel websites (e.g. Expedia, MakemyTrip)	25%	31%	51%	27%	18%
Movies, books, magazines, television shows	24%	14%	8%	12%	13%
Tourism board sites or resource centres	23%	24%	18%	33%	35%
Online travel blogs/vlogs	20%	19%	14%	22%	22%
Brochures, leaflets or books like Top Ten, Lonely Planet	20%	19%	13%	26%	30%
Travel agents in person or by phone	16%	21%	34%	24%	18%
Instagram or Pinterest images and amazing photos	13%	8%	4%	8%	13%
Facebook or other social or digital media posts and blogs	12%	9%	5%	10%	15%
Facebook or other social media advertising	11%	9%	6%	7%	12%
Hotel alternatives such as AirBnB	8%	9%	14%	6%	5%
Celebrity/ trusted expert endorsement	3%	5%	3%	3%	5%

How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %. Differences across the rows indicate differences in preference to these activities

# Price Sensitivity and the role of Online Travel Agents

- Britain is perceived as an expensive place to visit by many. Unsurprisingly therefore 9/10 visitors do some form of price comparison before booking.
- Long-haul bookers are more active in seeking out price comparisons, perhaps reflecting the greater overall spend

## % who did this before booking a holiday to Britain



OTA's play a significant role in enabling travellers to be confident with the price they are paying

	US
I often compare prices from multiple OTA websites	79%
OTAs are a good way of finding a destination within my budget	75%
Best way of getting the lowest price	66%

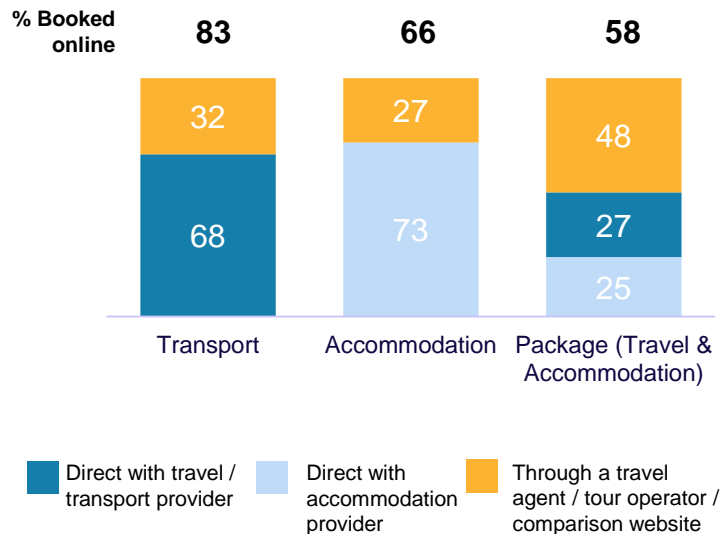
%Strongly agree/agree about booking travel though OTAs

OTA's are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low

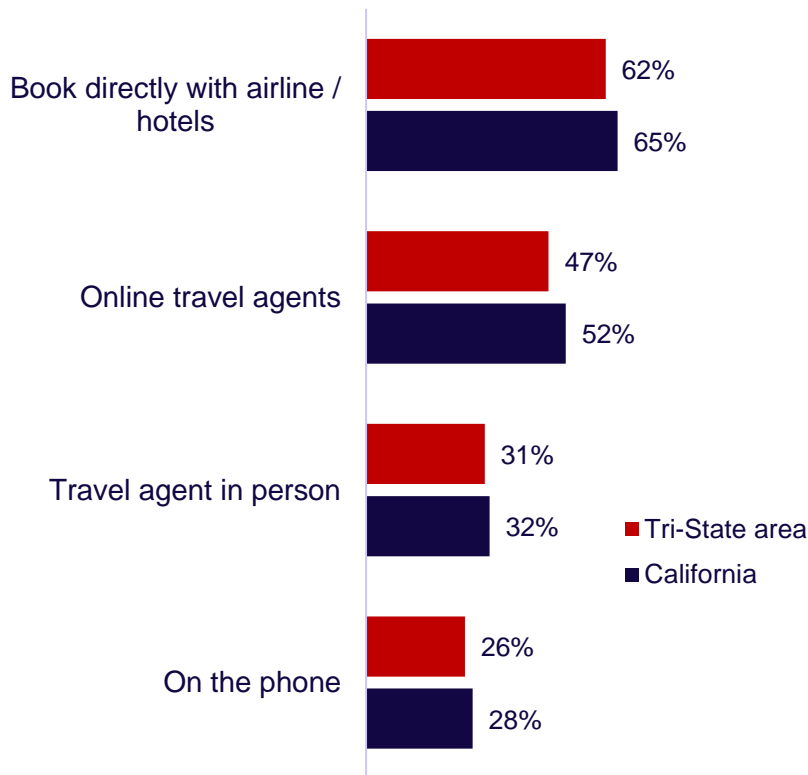
## Making the booking: 70% of those in the US booked their holiday to Britain as part of a package

### US: Channel used to book trip elements (%)

- Typically when transport and accommodation are booked separately, they are booked direct with either the travel / transport provider or direct with the accommodation provider.

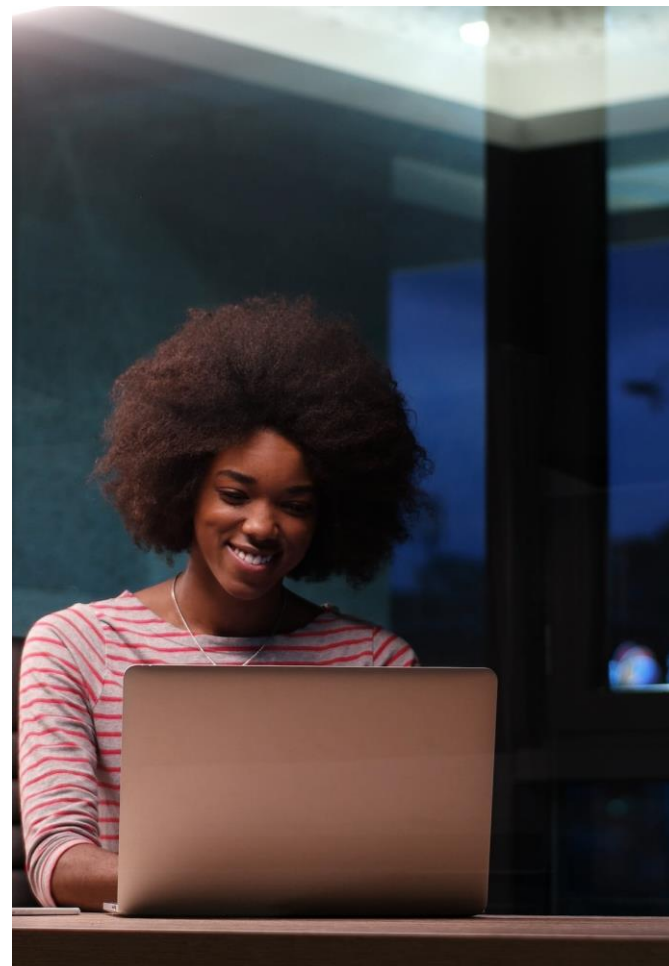
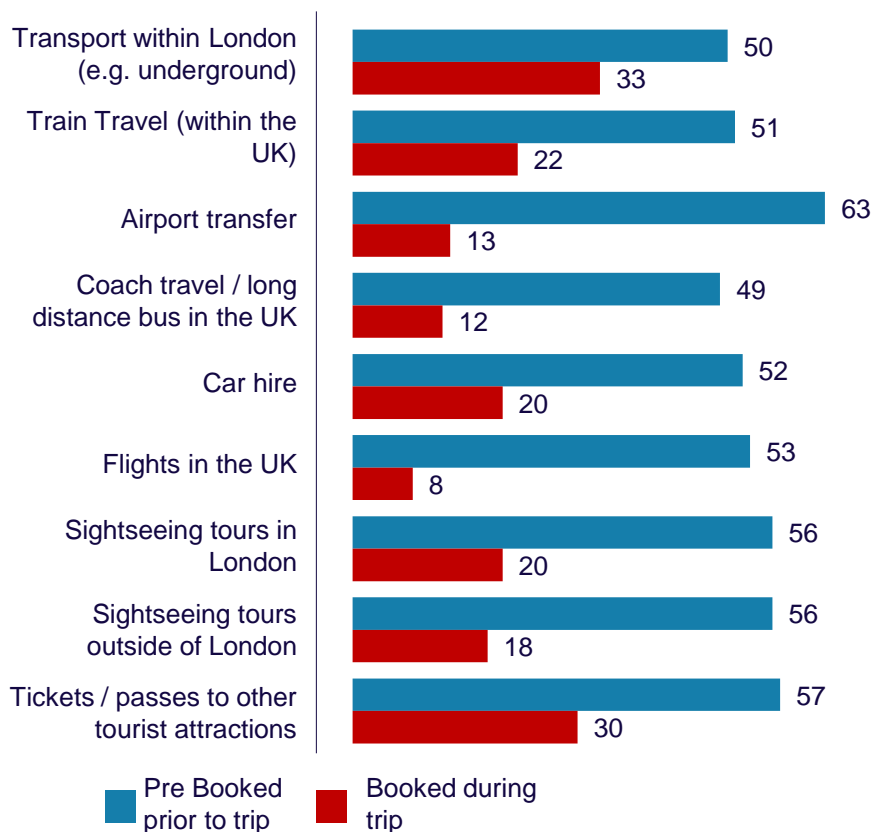


### US: Channel used to book trip



# The US visitor is more likely to book transport and activities in advance of their trip

## US: Pre-bookable transport / activities (%)





## Reaching the consumer in the US



### Broadcast media

- TV (Live + DVR) reached 226 million users in 2016.
- On an average day in Q1 2016, Americans aged 18 and over watched TV for about five hours (live and DVR). Younger Americans (18 to 34 years) spent less time watching TV than those aged 50 and over, around three hours and seven hours per day respectively.



### Radio

- Radio reached 240 million users in 2016.
- Americans listen to the radio for an average of 1 hour and 52 minutes each day.



### Magazines

- AARP The Magazine is the world's largest-circulation magazine, with more than 47 million readers, targeting the 50+ audience. Other US magazines with a high circulation are AARP Bulletin, Better Homes And Gardens, Game Informer Magazine, Good Housekeeping, Family.

Source: Nielsen, Cision, ComScore Mobile Metrix, Alliance for Audited Media



### Newspapers

- 169 million Americans read at least one newspaper each month. Readers of newspapers are relatively well educated and have a relatively high income. The digital distribution of newspapers has attracted more younger readers.
- Daily newspapers with the highest number of circulations in 2016 were USA Today, The New York Times, The Wall Street Journal, Los Angeles Times and New York Post. Newspaper circulation in print decreased in the past few years.



### Online media

- The growth in digital media usage time in the past few years is driven by smartphone usage. Mobile represented about two third of digital media time spent in June 2016.
- The apps with the highest number of unique US visitors (18+, June 2016) were Facebook, Facebook Messenger, YouTube, Google Maps and Google Search. Snapchat is becoming more popular across age groups.
- The social networks with the highest number of monthly users in the US are Facebook (171 million), Instagram (77 million) and Pinterest (69 million).



XV

Insight

## 4. Welcome

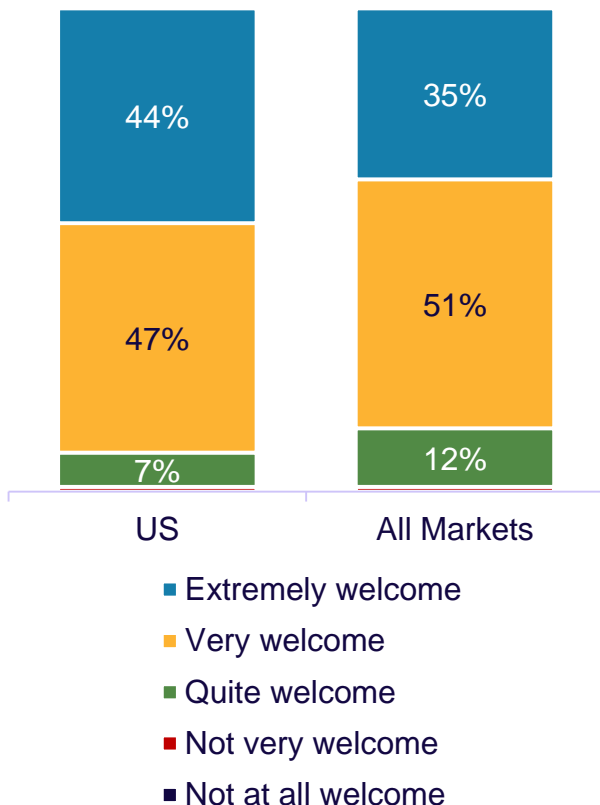


## Welcome: Overall Aim

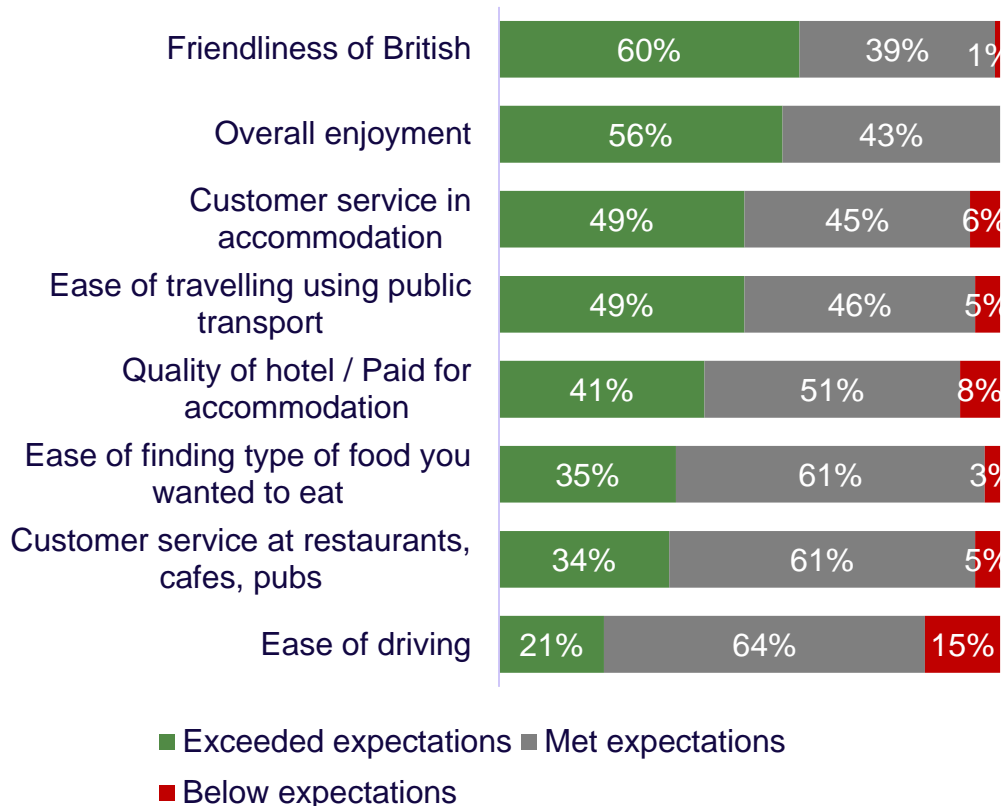
This strand will ensure that the welcome for international visitors is top-quality and relevant for the target group. It is aimed at a broad range of businesses in each destination and will help front line staff to become ambassadors for the destination and the Collection, adding value to a visit through their knowledge of the new narratives relevant to their own destination, but also other destinations in the Collection.

The majority of US visitors who have visited Britain stated they felt welcome, higher than the market average – however, there is some work to do around levels of customer service in food establishments

How welcome did you feel in Britain?



How would you rate the following in Britain compared to your expectations – US market





## Some considerations to make Americans' feel welcome in England

### Accommodation

- As many will arrive in Britain on overnight flights from the US, consideration for early check-in at hotels/accommodation is always appreciated, as well as some form of hospitality/services when they arrive (especially if their accommodation is not ready).
- Americans are used to larger rooms than are generally found in Britain, with their own private bathroom. Americans view accommodation as an important part of the travel experience. They will put a premium on staying at a grand/historic property or a hotel that reflects the local culture.
- The majority of Americans will want to stay in a 3-star plus property in a good/central location. They are used to larger beds.
- Health and wellness is trending in the USA. More Americans are looking for destinations which cater to that interest (e.g. Yoga, meditation, Spa, fitness facilities).

### Language

- American English differs in many common words, and Americans find the British accent very interesting. This may cause confusion yet at the same time serve as an ice-breaker for visitors and locals alike. It forms part of the charm and intrigue that Americans appreciate about Britain and adds to the authenticity of the travel experience.
- According to the Central Intelligence agency 79% of Americans' first language is English, and 13% Spanish.

### Tipping

- Americans are very comfortable paying for goods and services with a credit card.
- America has a tipping culture when it comes to service, and tipping between 15-20% of the food total bill is standard. As a result of this, they will expect good service from restaurants, even on the budget side, with tap water provided and refilled as happens routinely in most US restaurants.



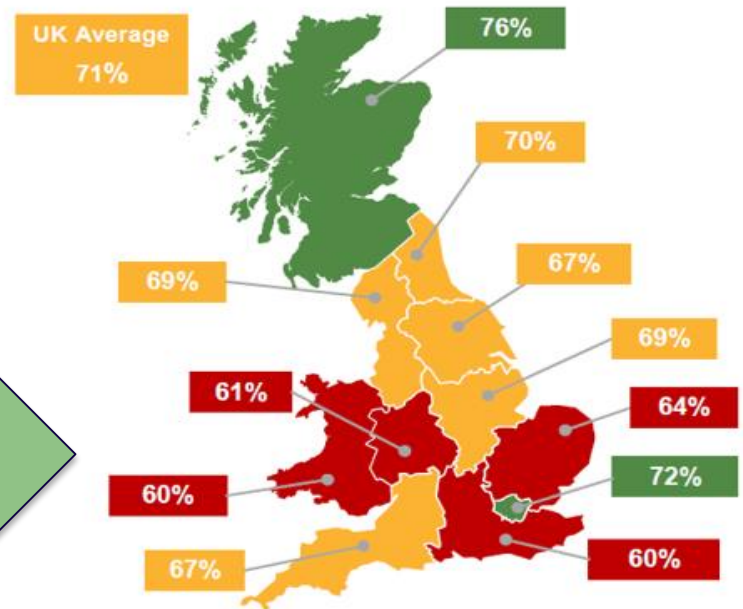
## Propensity to recommend Britain differs across regions – being highest in London and lowest in the South East and West Midlands

Level of Satisfaction for holiday visits (% very satisfied) – All Markets

Market	Attraction/Activities	Public Transport	Food & Drink	Value for Money
UK Average	65%	62%	39%	14%
London	68%	64%	39%	13%
North East	52%	58%	34%	20%
North West	63%	54%	41%	22%
Yorkshire	62%	47%	35%	22%
West Midlands	62%	50%	40%	13%
East Midlands	62%	62%	33%	18%
East of England	56%	52%	36%	12%
South West	50%	43%	36%	11%
South East	53%	51%	31%	10%
Scotland	66%	61%	48%	23%
Wales	54%	48%	35%	23%

London scores highest for attractions and public transport amongst holiday visitors, while value for money is just below average. There is a clear North-South divide on value for money perceptions with higher satisfaction for the North East, North West and Yorkshire.

Recommendation by Region - % Extremely likely to recommend – All Markets



How to read this chart: the darker green the cell the higher the %, the darker red the cell the lower the %.

Propensity to recommend Britain depends on the area visited. Holiday visitors to London gave the strongest recommendation scores out of all the English regions visited.

Some visitors stayed in more than 1 region. Data based on the first region visited.



VisitEngland

XV

Insight

Summary –  
key take-outs



## Summary: Potential Opportunities and Considerations

### 1a. Curation: Getting visitors to go beyond London

- One of the biggest known challenges is getting visitors to go beyond London - the majority of visitors tend to stay in or close to the region they have entered, with London and the South dominating visits and nights stayed among US visitors. The Heritage Cities team share the following challenges with many of the other DEF projects currently underway:

- 1) Transportation – providing greater clarity of how to get around regional England. Travel via train from London should not be a barrier to visiting the majority of heritage cities as most visitors are willing to travel 2-3 hours. The rail mapping exercise underway by the team and communication around ease of booking and journey via our train network should address the transportation issue among those who engage with your product.
- 2) Competing with other destinations – particularly Europe and London. Those in the target demographic are more likely to consider a wider set of destinations when considering Britain but Europe is the main competitor.
- 3) Low awareness of regional England – helping customers imagine what a holiday in regional England would be like is key. As part of your marketing communications both to the trade and direct with customers, it might help to compare English locations favourably with similar, well-known ‘regional’ offers in other countries.

Some cities, particularly Cambridge and Oxford, have relatively high awareness across the target age groups and coupled with their close proximity to London, might be a starting point / or focal point for marketing for first time visitors to the Heritage Collection. We know that knowledge of regional England increases among previous visitors – who may be more likely to travel further afield.

- The available research validates the importance of a partnership with London (the majority of American visitors enter the UK through London) but Manchester is also a key gateway for Americans. If not already in place, a partnership with Marketing Manchester should also be considered. Through another DEF project, Marketing Manchester have a focus on driving more traffic from America to Manchester Airport – and are looking for products across the North of England to add to a Manchester Plus product.
- While we understand there is a focus on travellers from the Eastern Coast of the US, recent research looking at East Coast versus the West Coast of the US indicates that those on the West Coast are more likely to have visited cities outside of London – and the average number of places visited is significantly higher (~5 places visited). If travel trade partners can be found, it is definitely worth considering whether West Coast should be in scope.
  - Furthermore, this data (average number of places visited based on recent traveller behaviour) should provide some guidance as to the optimum number of Cities to combine together within your product proposition.



## Summary: Potential Opportunities and Considerations

### 1b. Curation: Optimizing itineraries – multi-locations / duration

- The current market for multi-destination trips within England is quite small - Currently only 9% of inbound visitors across all markets to England are doing multi-destination holidays in England. Of this 9%, 47% visit 2 or more regions in England outside of London. Those who are London Plus are more likely to have visited just one other region. While those who are non-London multi-destination trips are more likely to have visited 2 or more regions.
  - Coupled with earlier evidence of the average number of places visited, Heritage should carefully consider how many of the Heritage City sites are bundled together to make the product appealing.
- Those in North America are already taking London Plus holidays, more so than are taking multi-destination holidays in England which exclude London. The South East and South West are the most visited regions overall – and most likely to be visited in combination. Although the South East and South West are also the most frequently stayed in regions within the London Plus market, the North West (24% of London Plus holiday trips involve a stay in this region) and to a lesser extent, Yorkshire (15%) are also well represented.
  - Based on the above, potential product itineraries should be tested: 1) SW/SE – Bath, Salisbury, Oxford, Greenwich and Canterbury. 2) NW / YO – Carlisle, Lancaster, Chester and York.
- When thinking about itineraries, Heritage Cities should also consider that a relatively high proportion of visits to Britain, especially among the target age group, involve stays in other countries. Are there other package tours in Europe, particularly France and Italy which offer similar experiences to Heritage Cities where partnerships can be developed?
- A point on seasonality - Multi-destination holiday trips to England are significantly more likely than single destination trips to occur over the summer period As Heritage Cities are positioning their product as an all-round opportunity, it should consider the seasonality that is evident among those who are talking multi-destination trips within England.
- When it comes to the length of time spent in England, London Plus holiday visitors stay the most number of nights, with 62% spending 8 nights or more in England. London Plus visitors stay longer than non-London multi-destination visitors (only 53% of these visitors staying 8 nights or more). Conversely, almost half (48%) of visitors on a London only holiday trip stay only 1-3 nights. This is significantly higher than those on a single destination holiday trip to a destination outside of London (36%).

## Summary: Potential Opportunities and Considerations

### 1c. Curation: Optimizing itineraries – activities and experiences

- It is a known fact that history and heritage are key drivers for visitation to England and is a key focus for the product – but some US visitors also want experiences which deliver a sense of adventure and / or challenge.
  - 37% of Americans are likely to consider challenge / action activities when on holiday – compared to the market average, Americans over-index on many active activities. However, we cannot assume that just because the American market is more pre-disposed to active activities that this would fit well with the Heritage Cities product. Specific activities available within the local area should be tested alongside the Heritage Cities offer to understand their fit together and / or consider building in challenges into your VR product offering (similar to those that made the PokemanGo app a success).
- The types of activities preferred whilst on holiday do not differ too much between East and West Coast residents of the US – exploring cities, visiting famous landmarks and trying local food and drink are top preferences
  - Food experiences certainly should play a supporting role in the Heritage Cities offer. Given the American's high use of technology to find places and access reviews, if not already part of the proposition, helping visitors find unique or the best places to sample local food and drink should be considered.
  - While relatively low on the list being pampered is something that appeals more to those in the Tri-State area and younger audiences. Going shopping is also more appealing to younger audiences. Consideration of relaxation activities within the package / or accommodation may be something to test further.
- There is a real desire to experience new and different experiences among Americans - this is not only in terms of the activities but perhaps types of accommodation in the offer.



## Summary: Potential Opportunities and Considerations

### 2. Interpretation:

- The Heritage Cities concept sits well with future travel trends and should resonate well with Americans given they are a highly developed tech market
  - In the US, staying connected and the use of technology is now an accepted part of the holiday experience.
  - Social media is not widely used during the holiday for recommendations and planning, suggesting that this information is sought from destination and attraction websites, specialist review sites etc.
  - As previously mentioned, helping visitors find unique or the best places to sample local food and drink should be considered within the app – as well as location based information and promotions.
- AR is a hot topic not just in the tourism industry, with many applications launching or in the pipeline. Gamification is used in some of these apps – which may resonate with the US audience given they want a sense of challenge
  - The success of Pokémon Go is well known – but part of its success could be attributed to the sense of challenge, fun and social dynamic it brings to its users. Others inside and outside the tourism industry are embedding gamification within their apps (see below).
  - Restaurants, bars and other catering facilities can use AR solutions for their benefit in several ways: i.e.
    - brand new restaurant menus with an interactive 360-view of each dish, correct portion size and ingredients.
    - using Pokémon Go to lure clients in.
    - navigation help with special mobile apps using AR to provide information about restaurants, cafes and bars nearby.
- If not already considered, Heritage Cities should stay connected to the *voice of the customer* (listening to feedback via social channels as well as within locations) to adapt the AR product as it gains traction. Suggestions have already been given via some social channels which are worth considering – in particularly the audio option.

## Summary: Potential Opportunities and Considerations

### 3. Distribution: Travel Trade Perceptions

- It goes without saying that the travel trade have potential to encourage or discourage visitors – they are also a key ally in helping us promote regional England. There are many strengths in the Heritage Cities offering but there are some challenges to overcome:
  - Unwilling to promote a product with unproven demand, in particular the North seen as difficult to sell
  - Past bad experience of trying to sell Central and Northern England
  - London and the South dominate - good for some Heritage Cities but not for others
  - Accommodation is seen as a 'fundamental' barrier - Occupancy data shows England running at 81% - 85% capacity over the summer months, leaving little opportunity for additional bookings and supporting the Travel Trade concerns around availability in Peak season
- The Travel Trade put forward a number of potential actions to address the accommodation concerns:
  - Offer distinctive accommodation (i.e. castles)
  - Building access to additional (alternative) accommodation types should both address the desire for authentic experiences and the capacity challenge
  - Trade rates
  - Price stability
  - Release periods on room allocations
  - Centralised booking mechanisms e.g. for smaller/specialised accommodation – B&B's, cottages
  - Focus on off-peak, whilst Peak capacity remains an issue
- The Travel Trade have concerns around transport & accessibility particularly to regional England. These concerns span all forms of transport:
  - Lack of regional flights
  - Nervousness of left-hand-drive
  - Rail concerns (prices, train quality & comfort, gaps in geographic coverage)

While these views may not be reflected in visitor experiences, they present a barrier to be overcome in convincing the Travel Trade of the England opportunity and will not help with building traveller confidence.

## Summary: Potential Opportunities and Considerations

### 3. Distribution: Direct with Customers

- There are four stages to the planning process; 60% of visitors from the US start to think about their trip more than 6 months in advance, with most deciding on the destination more than 3 months in advance. Timing of marketing campaigns will need to reflect this.
- Online and offline influences both play a role in helping Americans plan their vacation – online reviews and word of mouth are key. Different sources are used throughout the decision making process – Word of mouth is most influential when deciding on the destination but tourism boards' sites play an important role when deciding what to do at the destination.
- Price Sensitivity and the role of Online Travel Agents - Britain is perceived as an expensive place to visit by many. Unsurprisingly therefore 9/10 visitors do some form of price comparison before booking. Long-haul bookers are more active in seeking out price comparisons, perhaps reflecting the greater overall spend. OTA's play a significant role in enabling travellers to be confident with the price they are paying. OTA's are also seen as providing a wide choice and easy to use. However the brands are not necessarily differentiated and therefore loyalty appears to be low
- 70% of those in the US booked their holiday to Britain as part of a package – and more importantly the US visitor is more likely to book transport and activities in advance of their trip. Word of mouth and travel review sites play a big role in helping the US consumers decide on their itinerary prior to their holiday.

## Summary: Potential Opportunities and Considerations

### 4. Welcome

- The majority of US visitors who have visited Britain stated they felt welcome, higher than the market average – however, there is some work to do around levels of customer service in food establishments

Some considerations to make Americans' feel welcome in England

#### Accommodation

- As many will arrive in Britain on overnight flights from the US, consideration for early check-in at hotels/accommodation is always appreciated, as well as some form of hospitality/services when they arrive (especially if their accommodation is not ready).
- Americans are used to larger rooms than are generally found in Britain, with their own private bathroom. Americans view accommodation as an important part of the travel experience. They will put a premium on staying at a grand/historic property or a hotel that reflects the local culture.
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- Americans are very comfortable paying for goods and services with a credit card.
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# Appendix

- Updated segment profiles
- Data sources





# Segment Targeting Summary

- VisitBritain have been working on a new segmentation, that provides even greater insight into profiles, travel attitudes and behaviours. In this new segmentation, Cultural adventurers share many characteristics of the Culture Buffs segment, but also some of those of Sightseers for older Cultural adventurers and Buzzseekers for the younger ones.

	Explorers 	Adventurers 	Culture Buffs 	Sightseers 	Buzzseekers 
	<ul style="list-style-type: none"> <li>• 55+</li> <li>• Australia, Germany, France</li> </ul>	<ul style="list-style-type: none"> <li>• 45+</li> </ul>	<ul style="list-style-type: none"> <li>• 25 - 54</li> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• 55+</li> <li>• USA</li> </ul>	<ul style="list-style-type: none"> <li>• 18 - 34</li> <li>• Australia, Germany, France India, USA, Netherlands, Australia</li> </ul>
	<ul style="list-style-type: none"> <li>• Comfortable with who they are</li> <li>• Slower relaxed pace</li> <li>• Like to go places that don't attract tourists</li> </ul>	<ul style="list-style-type: none"> <li>• Comfortable with who they are</li> <li>• Outdoors in natural landscapes</li> <li>• Off the beaten track</li> <li>• Seek out new experiences</li> </ul>	<ul style="list-style-type: none"> <li>• Care about the image they project</li> <li>• Travel is reward for hard work</li> <li>• Demand worlds leading sights</li> </ul>	<ul style="list-style-type: none"> <li>• Cities</li> <li>• Creatures of habit</li> <li>• Sensible</li> </ul>	<ul style="list-style-type: none"> <li>• Seek new experiences</li> <li>• Action &amp; excitement</li> <li>• Pay for once-in-a-lifetime</li> <li>• Trendsetters</li> </ul>
	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Rural life &amp; scenery</li> <li>• Famous/iconic places</li> <li>• Outdoor leisure pursuits</li> <li>• Visiting parks &amp; gardens</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Rural life &amp; scenery</li> <li>• Famous/iconic places</li> <li>• History &amp; heritage</li> <li>• Outdoor leisure pursuits</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Famous/iconic places</li> </ul>	<ul style="list-style-type: none"> <li>• Local food &amp; drink</li> <li>• Famous/iconic places</li> <li>• Experiencing city life</li> </ul>	<ul style="list-style-type: none"> <li>• Famous/iconic places</li> <li>• Local food &amp; drink</li> <li>• Challenge/action filled</li> <li>• Hands on learning</li> </ul>
	<ul style="list-style-type: none"> <li>• B&amp;B/Self-catering</li> </ul>	<ul style="list-style-type: none"> <li>• B&amp;B</li> </ul>	<ul style="list-style-type: none"> <li>• Mainstream hotels/B&amp;B</li> </ul>	<ul style="list-style-type: none"> <li>• Mainstream hotel only</li> </ul>	<ul style="list-style-type: none"> <li>• Airbnb, camp, alternative accommodation</li> </ul>
	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Movies, books, magazines &amp; travel agents</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Websites</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Travel in groups or families</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Websites &amp; travel agents</li> <li>• Deal-seekers</li> </ul>	<ul style="list-style-type: none"> <li>• Friends &amp; family</li> <li>• Trusted influential</li> <li>• Mobile- natives</li> <li>• Spontaneous</li> </ul>
	<ul style="list-style-type: none"> <li>• Mature Experience Seekers</li> <li>• Outdoor Enthusiast</li> </ul>	<ul style="list-style-type: none"> <li>• Outdoor Enthusiast</li> <li>• Mature Experience Seekers</li> </ul>	<ul style="list-style-type: none"> <li>• Lifestyle Travellers</li> <li>• Cultural Adventurers</li> </ul>	<ul style="list-style-type: none"> <li>• Conservative Retirees</li> </ul>	<ul style="list-style-type: none"> <li>• Young Active Explorers</li> <li>• Lifestyle Travellers</li> </ul>
			<ul style="list-style-type: none"> <li>• Core Target</li> </ul>	<ul style="list-style-type: none"> <li>• Core Target – 18-34yrs old</li> </ul>	<ul style="list-style-type: none"> <li>• Core Target - 25-35yrs old</li> </ul>

# CULTURE BUFFS

## AGE

- 25yrs-54yrs (average 37)
- 18-24 (21%); 25-34 (26%); 35-44 (21%); 45-54 (23%); 55+ (9%)

## KEY MARKETS

- China

## GENDER

- 57% Female

## DEFINING ATTITUDES

- Care about the image portrayed to others
- Like to see travel as a reward for their hard work
- Demand to see the world's leading sites

## FAVOURITE TRAVEL ACTIVITIES

- Experiencing local food & drink
- Visiting famous/iconic places

## UNIQUE TRAVEL ACTIVITIES (versus other segments)

- World class food and drink
- Theme parks, zoos, day outings

## GB LIKELY ACCOMMODATION (unique vs others segments)

- Mainstream hotels and bed and breakfast

## TRAVEL PLANNING & STYLE

- Friends & family are major influence
- More likely to travel in medium sized group
- Typically families (41%)



## WHO ARE THEY?

Image and brand conscious, these individuals are concerned with how others see them, so travelling can fulfil this status kudos, particularly in how they travel and what they do abroad, as they still like to choose well known, safe tourist destinations for their travel needs.

# SIGHTSEERS

## AGE

- **Over 55yrs (57%)**  
18-24 (9%); 25-34 (7%); 35-44 (13%); 45-54 (14%); 55+ (57%)

## KEY MARKETS

- USA

## GENDER

- 52% Male

## DEFINING ATTITUDES

- Prefer cities to countryside
- I know what I like and tend to stick with it
- Like to have a small group of really close friends
- Sensible
- Prefer stability

## FAVOURITE TRAVEL ACTIVITIES

- Experiencing local food & drink
- Visiting famous/iconic places
- Experiencing city life

## UNIQUE TRAVEL ACTIVITIES (versus other segments)

- Experiencing city life
- Attending a specific event

## GB LIKELY ACCOMMODATION (unique vs others segments)

- Mainstream only (hotels, or inner city bed and breakfast)

## TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Websites and travel agents
- Often look for travel deals
- Most travel with one other (46%)



## WHO ARE THEY?

Comfortable with who they are, but can still be quite uncertain when it comes to international travel, wanting to visit places and sites that are well known, safe and well resourced for foreign tourists. They are city tourists through and through – enjoying sites that are easy to find. Sensible, well planned, they like to avoid uncertainty, so will seek advice and reassurance in planning their trip.

# BUZZSEEKERS

## AGE

- **Most (64%) 18-34yrs**  
18-24 (36%); 25-34 (28%);  
35-44 (17%); 45-54 (10%); 55+ (9%)

## KEY MARKETS

- India, France, Germany,  
Netherlands Australia, USA

## GENDER

- 56% Male

## DEFINING ATTITUDES

- Seeking out new experiences
- Always looking for new things to do with one's time
- Taking holidays full of action & excitement
- Happy to pay more for once-in-a-lifetime experiences
- See themselves as trendsetters and more popular than others

## FAVOURITE TRAVEL ACTIVITIES

- Visiting famous places/iconic sites
- Trying local food & drink specialties

## UNIQUE TRAVEL ACTIVITIES (versus other segments, but still niche)

- Challenge or action-filled activities
- Hands-on learning activities

## GB LIKELY ACCOMMODATION (unique vs others segments)

- Someone else's home (e.g. Airbnb)
- Tent or caravan
- Alternative accommodation

## TRAVEL PLANNING & STYLE

- Friends & family are major influence
- Trusted/famous endorsers influential
- Mobile device natives
- Leave plenty of room for spontaneity



## WHO ARE THEY?

Free spirited, spontaneous, Buzzseekers are living in the moment and always looking to make the most of their time. Constantly fueled by the desire for 'more', they are constantly on the search for new ideas, looking to meet new people and engage in new activities that will challenge them, providing fun and a sense of individual growth.



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