



**SOUTH WEST  
ENGLAND IS  
GREAT  
BRITAIN**

South West

£5M

Overseas Marketing  
Fund

US



German speaking



Australia



The Netherlands



Scandinavia



Ireland



Secondary markets



# Descend on DRAMATIC SCENES



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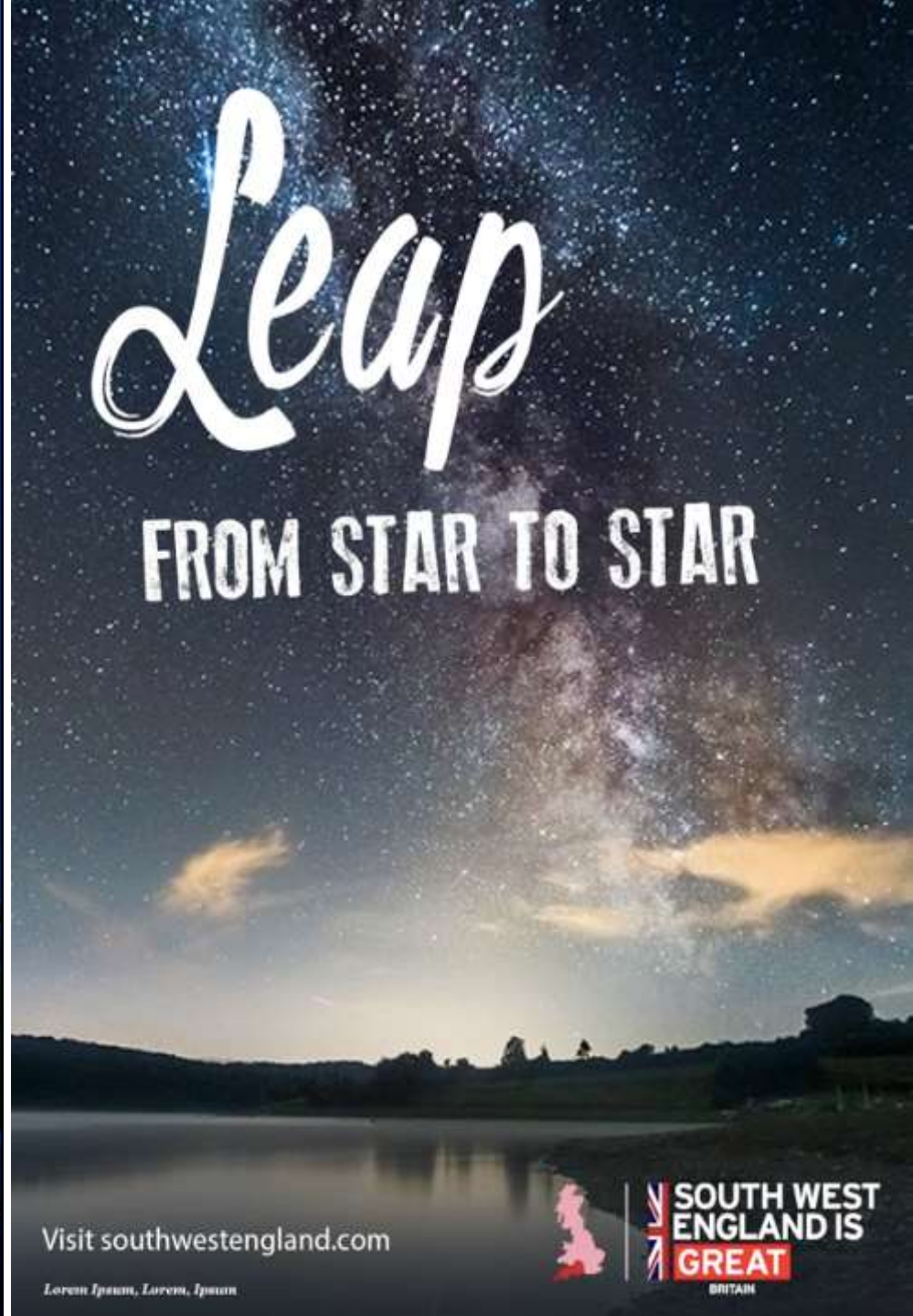
**SOUTH WEST  
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Lorem Ipsum, Lorem, Ipsum

# Leap

## FROM STAR TO STAR



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# Product Development and Legacy Activities



Travel Trade &  
Agents

PR and Media  
Relations

Content Creation

Internationalising  
Websites

Business  
Development

Training

International  
Education

Press and Trade  
Fam Visits

Business Tourism  
& Events

# Photo eggs in basket

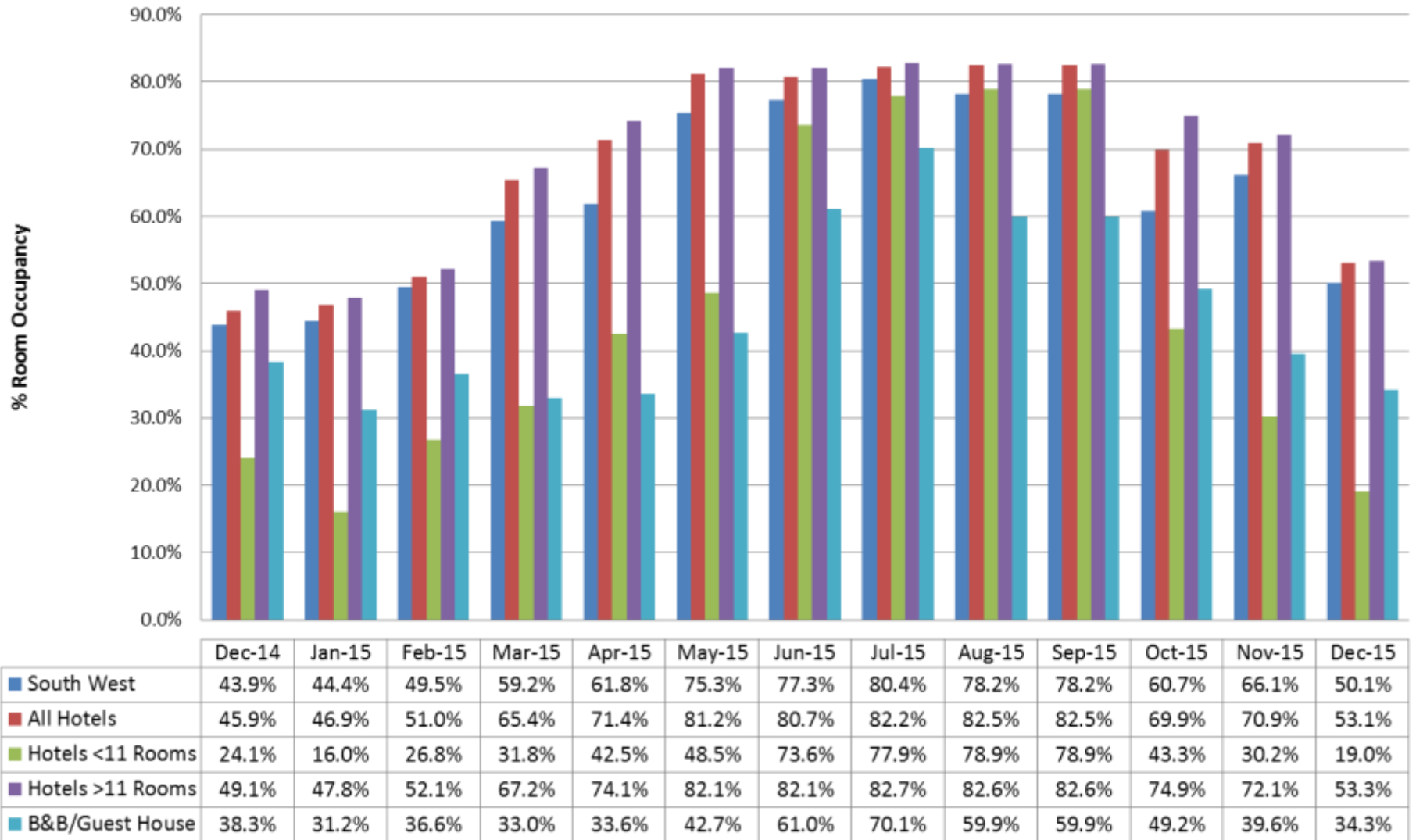
Don't put all your eggs in one  
basket – too great a risk

# Boston Matrix approach

- Many tourism businesses only have 'CASH COWS'
- That's great and understandable – but you also need 'STARS' (ie high growth / higher market share)
- International visitors can help bring this
- Be careful not to have 'DOGS (ie low growth, low market share, and potentially involve more cost than income)

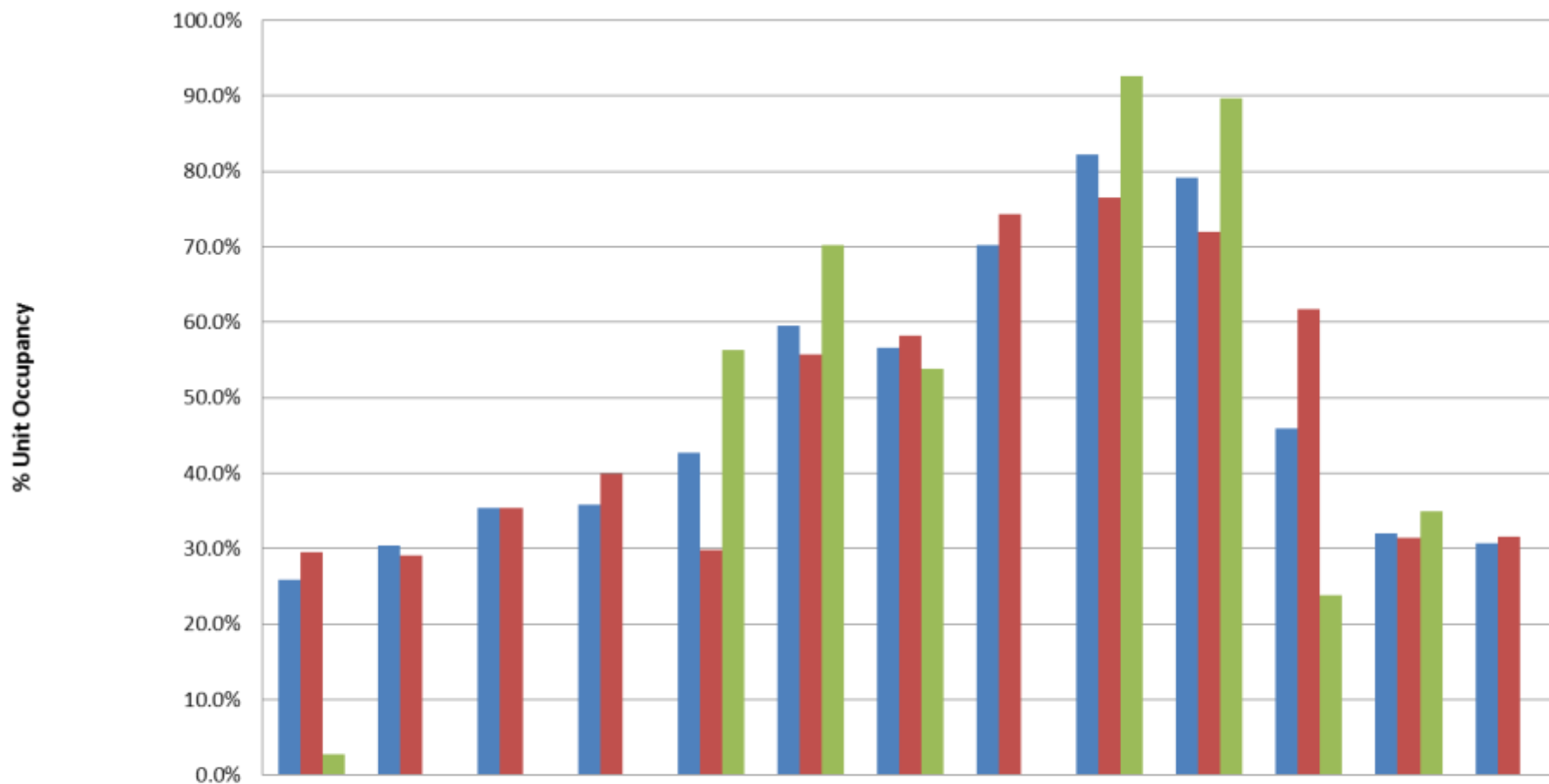


# Regional performance – Serviced Room Occupancy (thanks Tourism South West Research Co)



**It should be noted that the figures provided represent the occupancy rates for those responding to this survey and the results are not weighted to represent regional and county accommodation stocks.**

# Regional performance – Self Catering Unit Occupancy



	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
■ South West	25.9%	30.4%	35.4%	35.9%	42.6%	59.5%	56.5%	70.2%	82.1%	79.2%	45.9%	31.9%	30.7%
■ Self Catering Accommodation	29.5%	29.0%	35.4%	39.9%	29.8%	55.7%	58.3%	74.3%	76.4%	71.9%	61.7%	31.4%	31.6%
■ Holiday Parks	2.8%				56.3%	70.1%	53.8%		92.6%	89.6%	23.9%	34.9%	

**It should be noted that the figures provided represent the occupancy rates for those responding to this survey and the results are not weighted to represent regional and county accommodation stocks.**

# Spend more as stay longer

- Av int trip £472 vs £285 UK visitors to SW
- Trip length is 7 days vs UK visitors 4.31



# Foreign tourists explore further afield – and spend more

Written by: Samantha Mayling, Thursday, February 25th 2016, 13:00

More international tourists are travelling beyond London to other English regions – and they are spending more too.

In the first nine months of 2015, visits to English regions outside London rose 7% year-on-year to a record 11.7 million.

Spending by international visitors across the regions increased 4% to £5.8 billion.

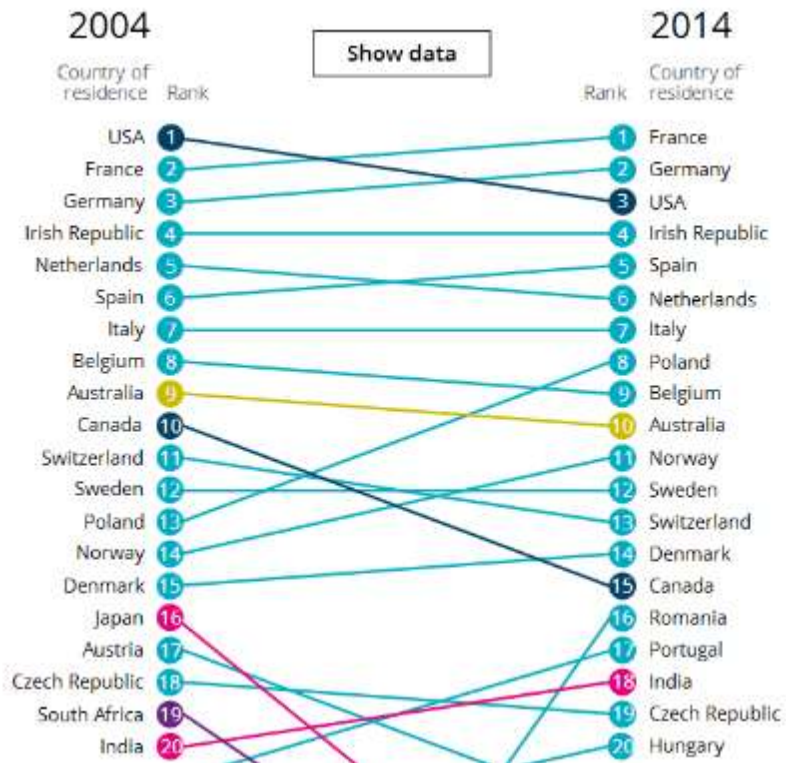
Numbers of international visitors travelling to the north showed especially strong growth in the first nine months of 2015, with visits to the north east up 23% year-on-year to 460,000, and up 12% to 2.1 million in the north west.

Germany, France and the Irish Republic are the top markets. Visits from China to the regions were up 47% to 116,000 and Canada up 20% to 241,000.



# Headline trends 2014

## 34.4 m visits

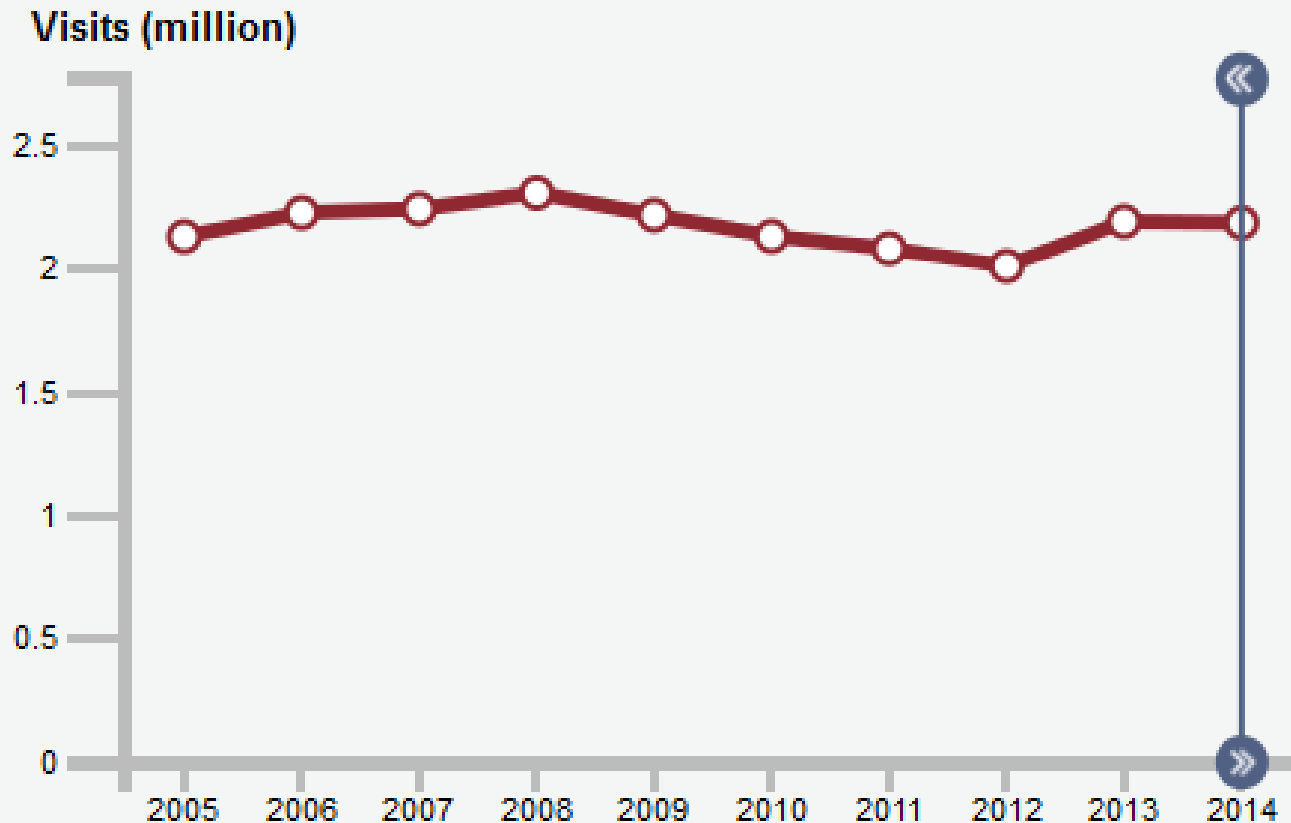


Top ten markets by volume

From	Visits (000)	% of all visits	
1	France	4,114	12%
2	Germany	3,220	9%
3	USA	2,976	9%
4	Irish Republic	2,486	9%
5	Spain	1,986	6%
6	Netherlands	1,972	6%
7	Italy	1,757	5%
8	Poland	1,494	4%
9	Belgium	1,122	3%
10	Australia	1,057	3%

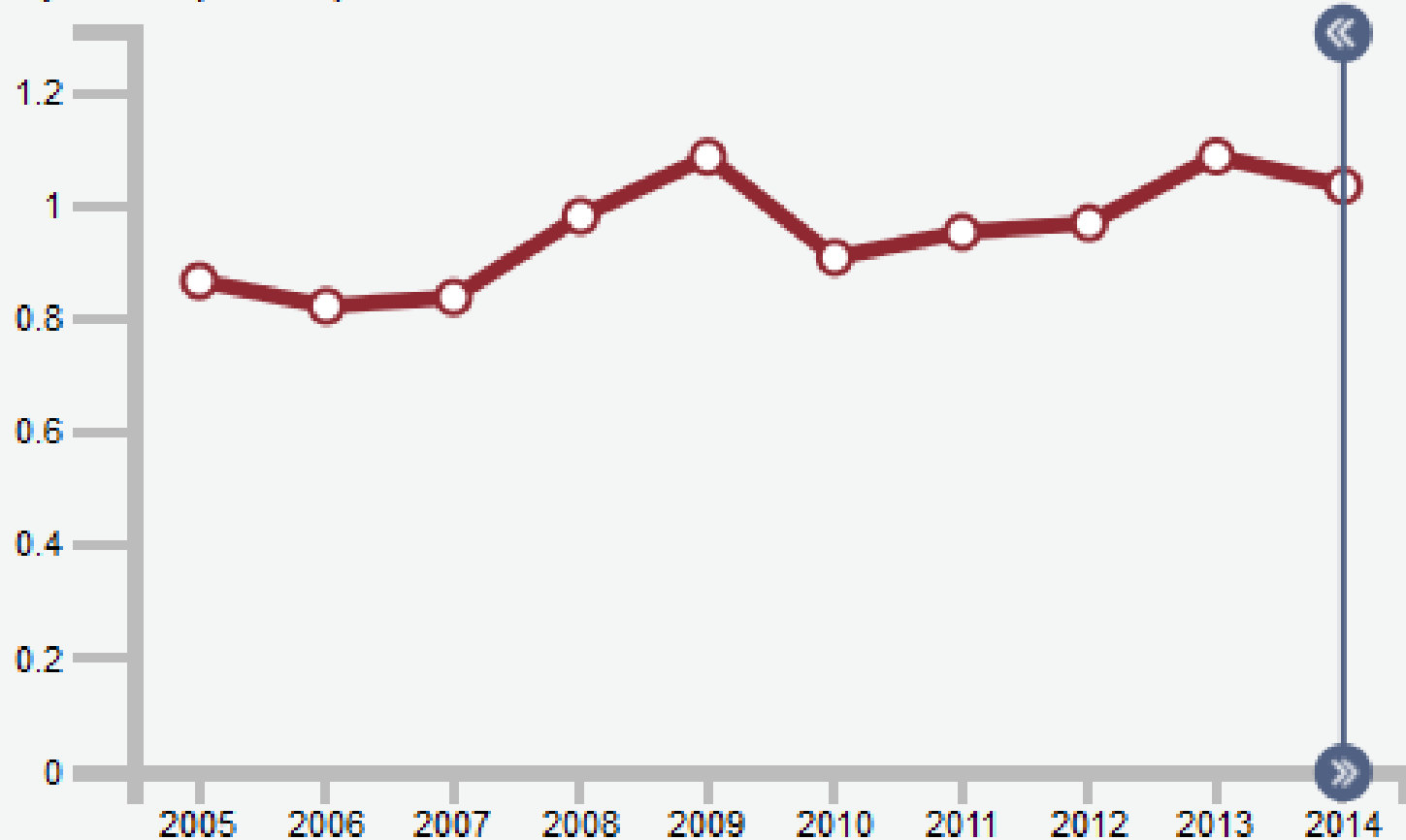
# International visitors to SW

2014 Top UK towns for staying visitors Bristol 8<sup>th</sup> (446,000), Bath 17<sup>th</sup> (236,000), Bournemouth 25<sup>th</sup> and Plymouth 28<sup>th</sup>

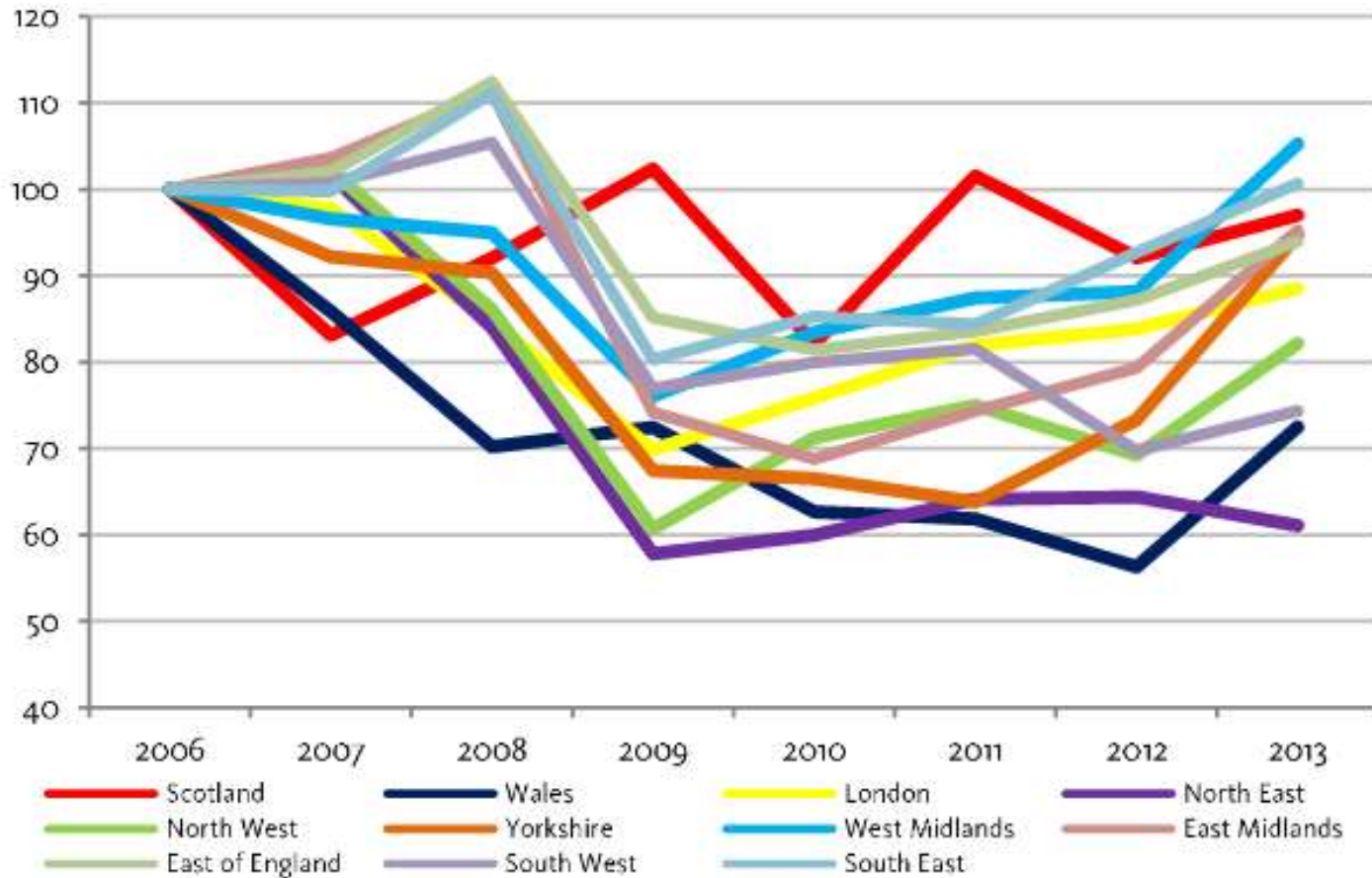


# International visitors to SW

Spend £ (billion)

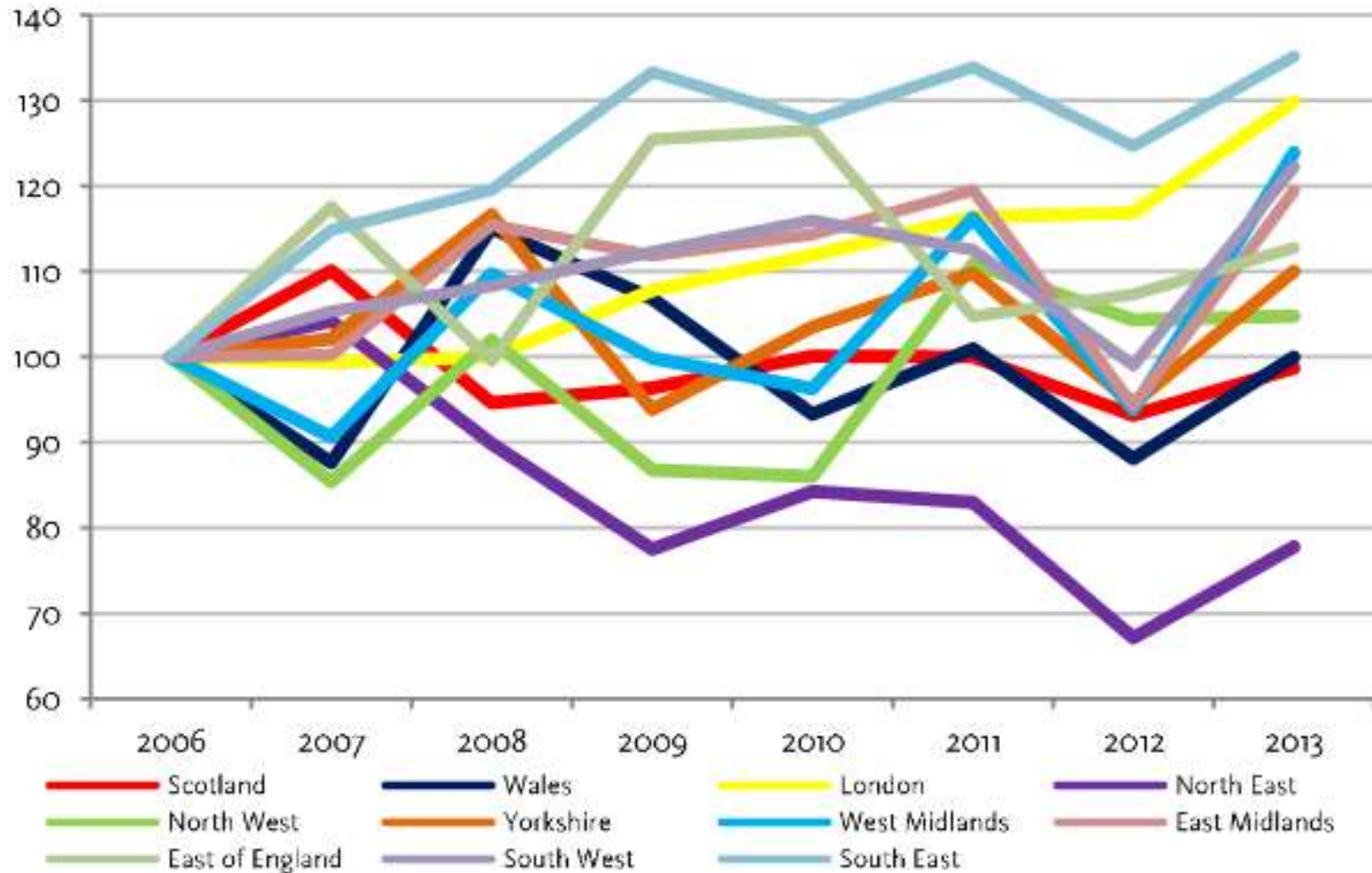


# International business visitors

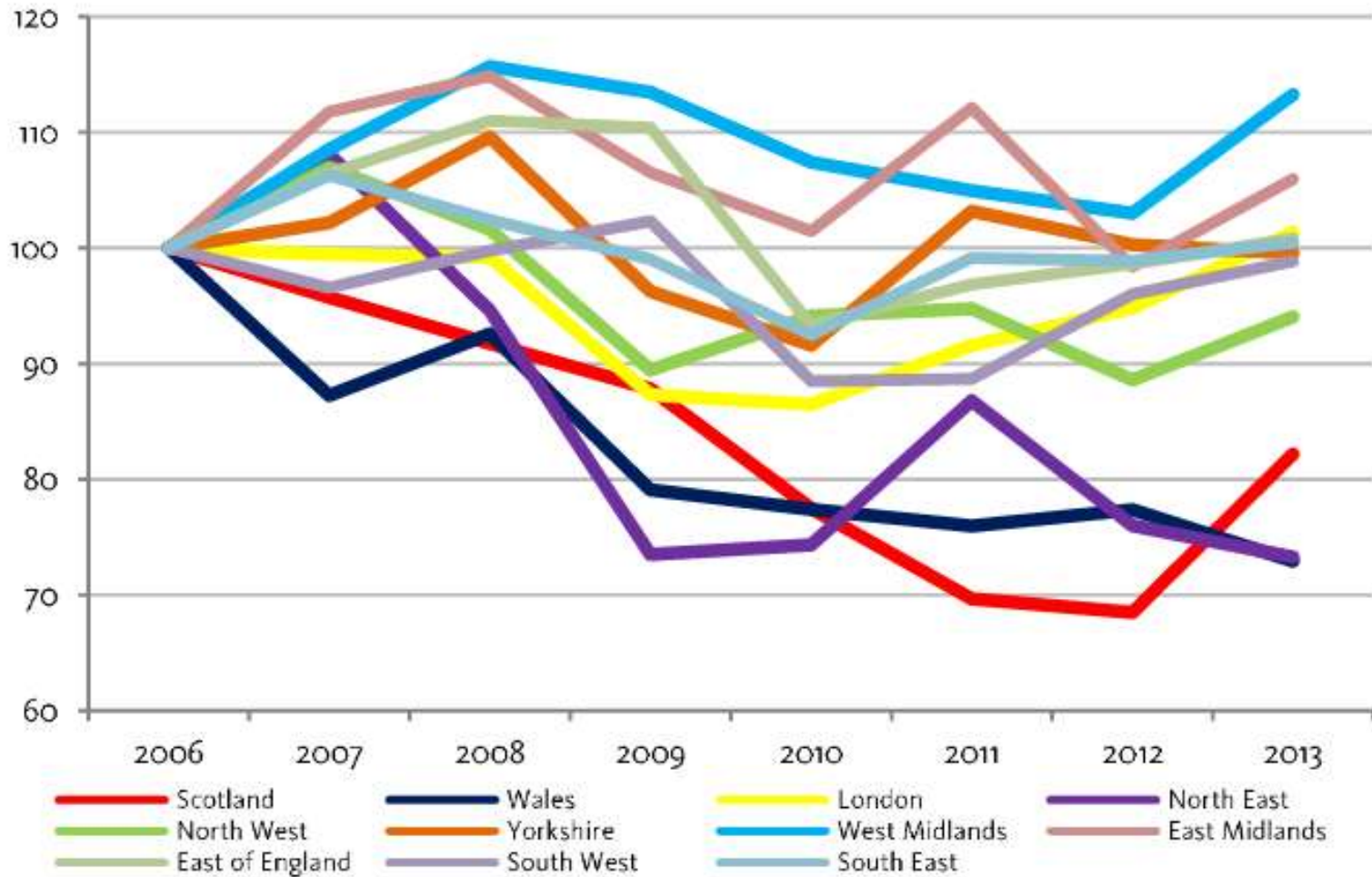




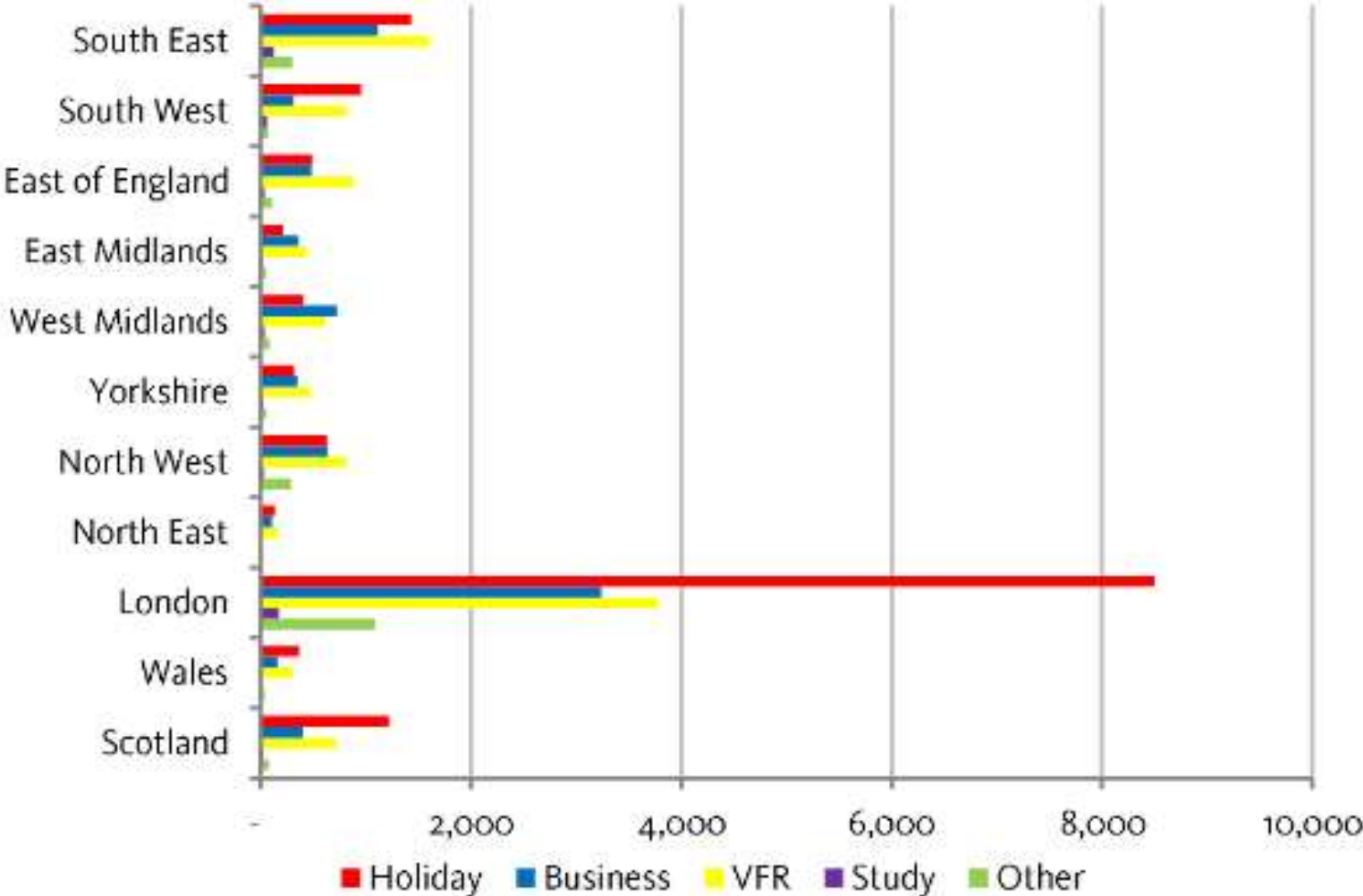
# International holiday visitors



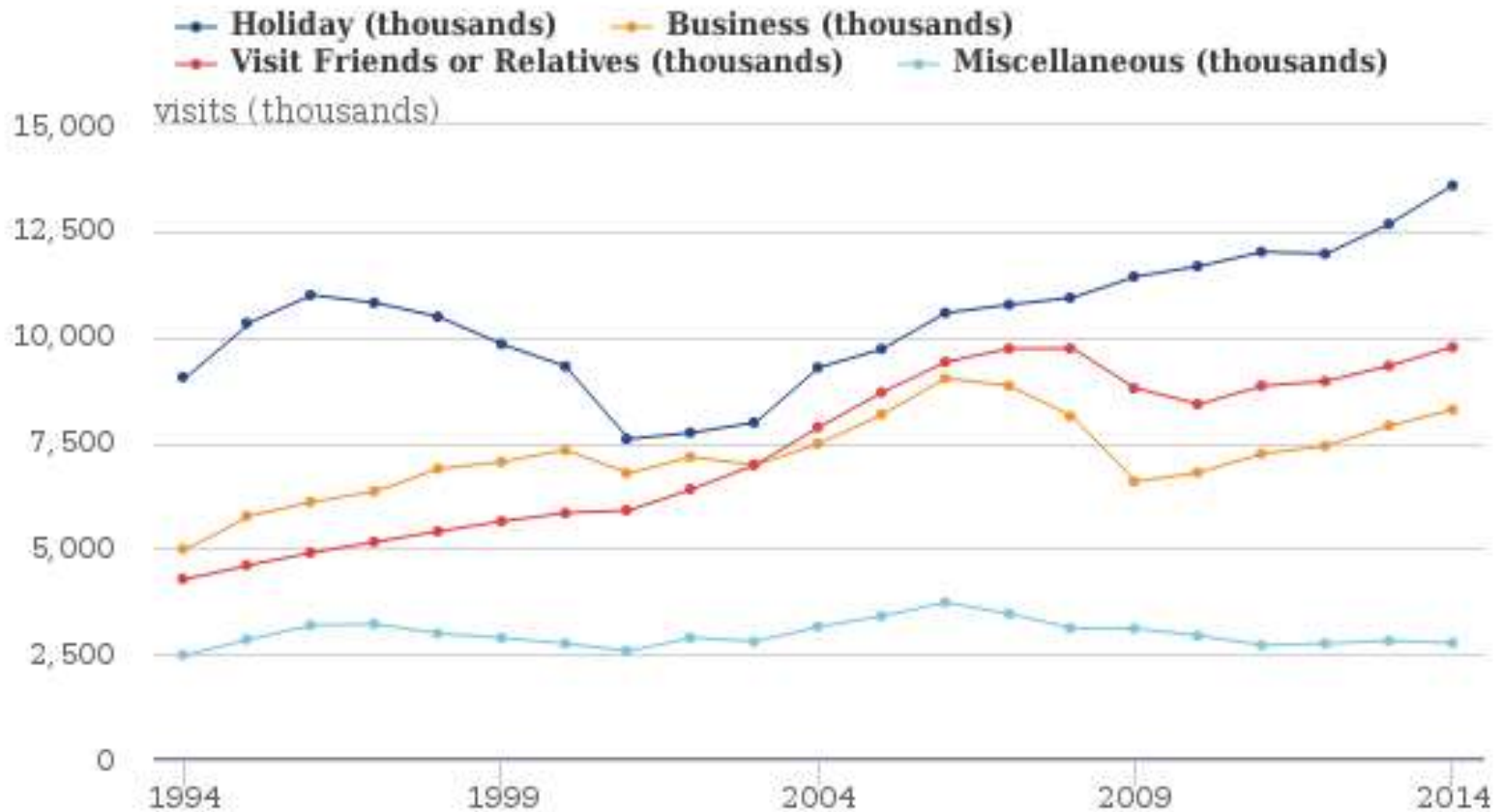
# International VFR



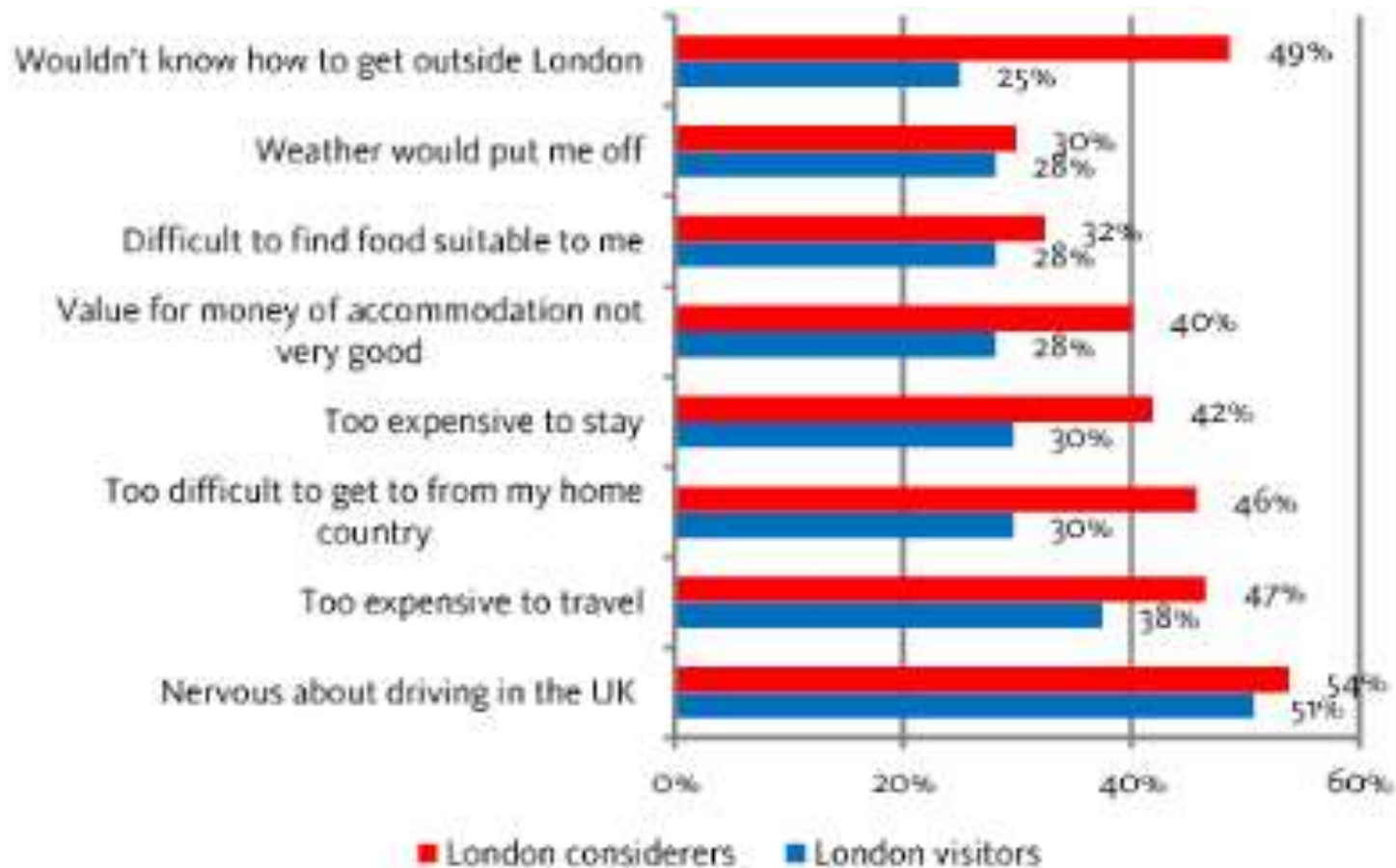
# International purpose of visit



# Purpose growth



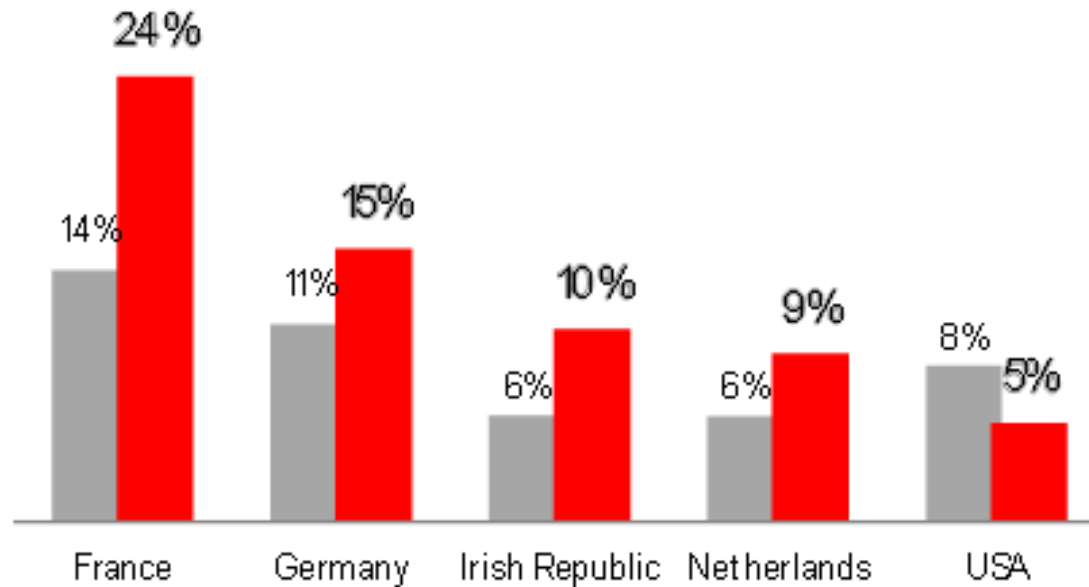
# Barriers for travel outside London



# Driving in the UK

- Driving on wrong side
- Gear sticks
- Roads too narrow – single track
- Pick up car at airport then hand it back when get to SW?
- Opportunity for chauffeur tours?

# Top five markets for holiday visits by international tourists to SW



2012 – grey is average region

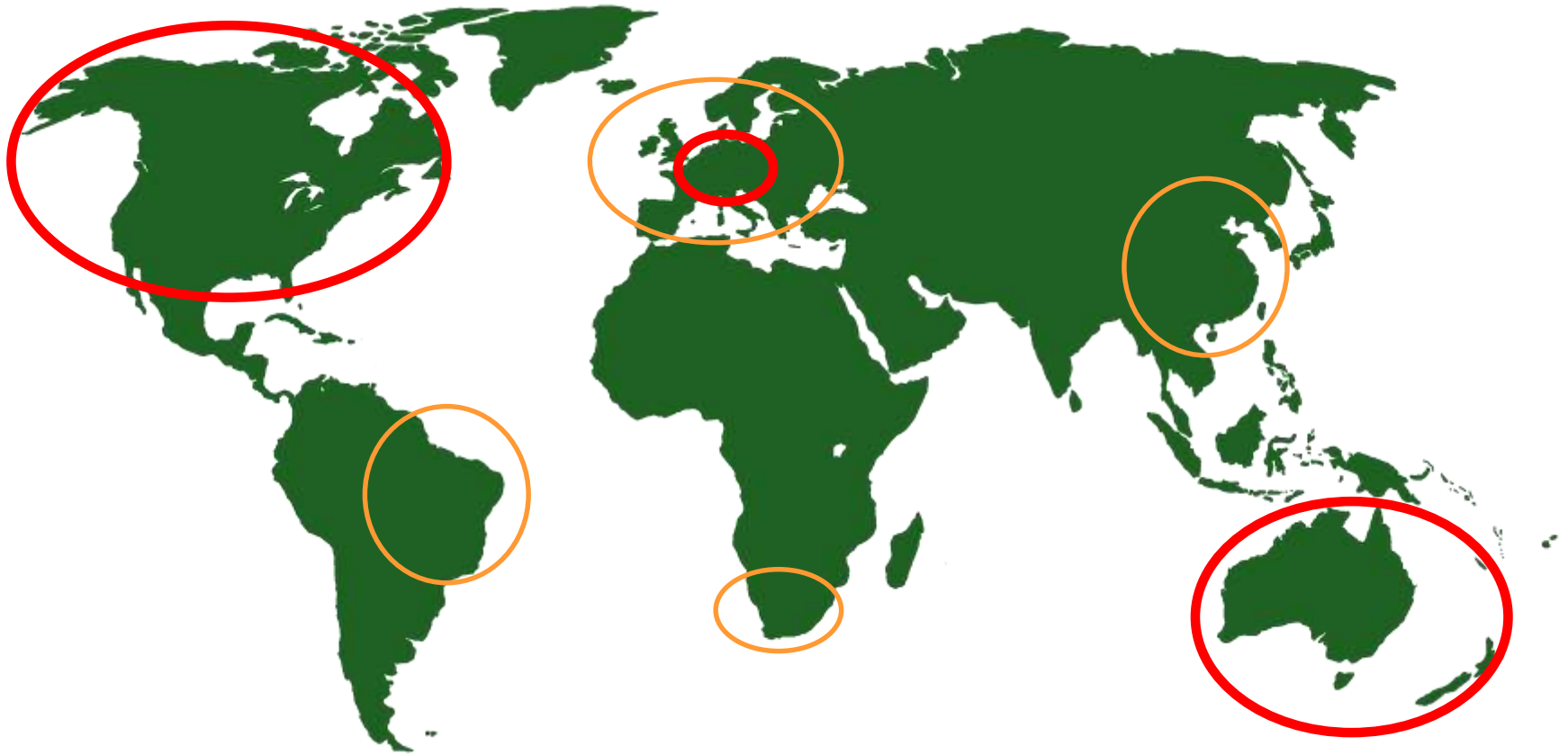
# Exchange Rates

- 1.4 to 1.25 Euros to Pound
- Euro now buys 80p – was 70p
- Opportunity but ... probably not main motivator



What are SW businesses  
doing?

Which countries are SW businesses targeting?



# Demography of target markets

- Families with pre-school children (N Europe)
  - Not tied to school holidays
  - Not hassle of airports / long journeys
  - Climate – not too hot
- Families
  - Overseas school hols not the same as ours
- Family and Friends (inc visiting students)
- Empty Nesters
  - Can come when they want, longer stay, want to explore / learn

# What do they want to do?

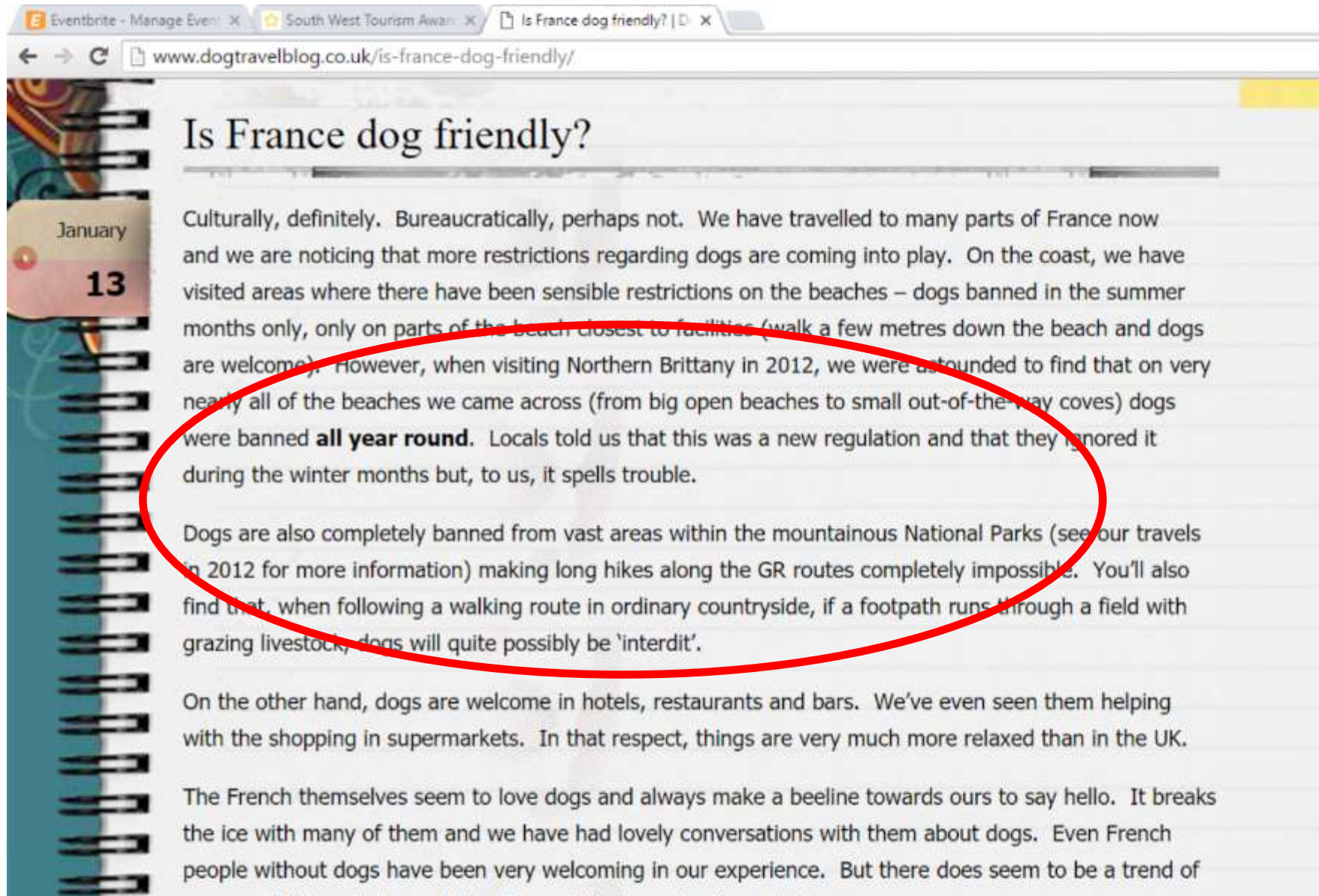
- Walk / great outdoors / coastpath / moors
- Heritage – hear ‘people stories’
- Visit family and do things with them (inc students)
- Cycling – inc hills
- Follow film / literary theme
  - Pilcher, Poldark, Lorna Doone, Hardy, Agatha Christie, French Lieutenant’s Woman, Doc Martin etc

# Not to mention ... link with transport



# Dogs – huge market / great opportunity

- Need to be genuinely 'welcoming' not just 'accepting'



Eventbrite - Manage Event X South West Tourism Award X Is France dog friendly? | D X

www.dogtravelblog.co.uk/is-france-dog-friendly/

## Is France dog friendly?

Culturally, definitely. Bureaucratically, perhaps not. We have travelled to many parts of France now and we are noticing that more restrictions regarding dogs are coming into play. On the coast, we have visited areas where there have been sensible restrictions on the beaches – dogs banned in the summer months only, only on parts of the beach closest to facilities (walk a few metres down the beach and dogs are welcome). However, when visiting Northern Brittany in 2012, we were astounded to find that on very nearly all of the beaches we came across (from big open beaches to small out-of-the-way coves) dogs were banned **all year round**. Locals told us that this was a new regulation and that they ignored it during the winter months but, to us, it spells trouble.

Dogs are also completely banned from vast areas within the mountainous National Parks (see our travels in 2012 for more information) making long hikes along the GR routes completely impossible. You'll also find that, when following a walking route in ordinary countryside, if a footpath runs through a field with grazing livestock, dogs will quite possibly be 'interdit'.

On the other hand, dogs are welcome in hotels, restaurants and bars. We've even seen them helping with the shopping in supermarkets. In that respect, things are very much more relaxed than in the UK.

The French themselves seem to love dogs and always make a beeline towards ours to say hello. It breaks the ice with many of them and we have had lovely conversations with them about dogs. Even French people without dogs have been very welcoming in our experience. But there does seem to be a trend of

# Who is doing what?

- Random!
- Little coordination
- Many doing nothing
- Some attracting overseas visitors without planning or knowing it
- Some linking with destination activity
- Or doing complete opposite! (ie being different)

# Who doing what?

- Many 'fallen into some international marketing'
- 'They came to me'
- Marketing spend from 0 to 10% (a few more than this)
- Destination coordination (esp with Travel trade)



What are they doing?

# Partnerships

- Linking with other businesses eg Airlines
- Work with partners eg VisitBritain, VisitBath, VisitBristol
- PR agencies set up fam trips
- Networking events
- VisitBritain events & sales missions
- Journalists I have met
- Affiliate sites
- Work through OTAs and intermediaries.

# Advertise

- Interhome and House Trip
- BA Highlife mag
- Advertise in brochures eg China holidays
- Alan Rogers guide
- Ads in specialist magazines (eg Dutch cycling) a waste of money.

# Exhibitions (and Trade)

- ILTM Asia
- ITB
- Vakantiebeurs
- IN PARTNERSHIP with others / destinations etc

# Groups / Trade

- Not just about 55 seater coaches
- Growth in smaller group business, eg
  - 7 seater MPVs
  - Minibuses
  - Independent travel
- Access not just via shows etc – some Internet / Social / direct contact
  - Eg worth looking at members of AITO for tour operators running smaller special interest holidays

# Digital/social

- Attract bloggers
- Blogs
- Vlogs
- Social media eg
  - Weibo (china)
  - Webchat (overtaken email).
  - Photo sites
  - Zoover
  - Twitter
    - NB – not just to broadcast but to engage in ‘conversation’
    - Many businesses now reacting to Tweets within seconds
  - Facebook

# Website

- Adwords key – be clever and link to theme / activity
  - You prob can't afford 'Devon Holiday'
- Other search engines
  - (ie not just Google – eg Baidu, Yandex, Bing)
- Foreign versions of search engines (eg Google.de)
- Imagery and Video important motivators – and largely cover language barriers

# Translate or not translate?

- Having pages in different languages best, BUT
  - Raises expectation your staff will speak that language and know cultural differences.
  - ARE YOU READY?
- If not, often better to rely on Google Translate (widget very low cost)
- OTAs automatically translate ... but commission/loss of control
- For emails etc always use native speaker to write appropriate copy (not just translate English)
- Ditto translated text on Facebook etc



# PR

- PR eg VB part of Great China Welcome
- PR using specialist agency

# Direct E-Mail

- Targeted seasonal eblasts to agents
- E-blasts with a different message targeting different markets.
- Newsletters to travel trade
- Targeted emails by native translators – Dutch and German – works well and not expensive

# Other

- Camping cheques and the ACSI card
- Film and TV broadcast worldwide
- Via Blue Badge guides – link with cruise
- Prize competitions with different markets

# What about OTAs & Intermediaries?

- Translations into >30 languages, huge reach
- BUT high commissions / loss of control
- HomeAway.co.uk, Holidaylettings.co.uk
- AirBNB – many tourism businesses using
- Mr & Mrs Smith
- Protect yourself! (eg trademark, maintain control, etc)

# ONLINE BOOKING IMPORTANT

- Time difference when they are browsing / booking
- Translation
- Habit / loyalty (they may be used to specific OTA)
- Easy to use / 3 clicks (is yours as easy?)
- Payment options
- Link to reviews
- **NOT JUST ACCOMMODATION!**

# AND TRIPADVISOR

- Respond to all reviews
- Translated versions (eg Tripadvisor.de)
- Biggest growth is
  - Places to eat
  - Activities / Things to do
- Average review score is 4.1 ex 5 (ie positive)

Changes made

# CHANGES TO YOUR BUSINESS

- Remove Alcohol (if attracting key markets)
- Menus / food options – meet diff needs
- Bike racks
- Tourism Info – you may be the provider – need to know your area well
- Proper coffee – not instant! (historic!)
- Decent showers – Power for US visitors
- Fridge (silent) in room on request
- Lettuce driers? (universal in France)
- Large king size zip beds (esp for US)



# Training

- Language
- Culture (eg Welcome courses ..)
- Social media
- UKTI workshops and joining the Passport to Export Scheme
- China Britain Business Council workshops
- Attend Conferences

# What have you learnt?

- Can't do them all – be selective
- Group market long lead time
- Be reactive and act on feedback
- Give it a try ...
- Need to try harder!!
- Work with other tourism businesses / DMO

# Top tips

- Focus on market that suits your product
- 20% of visitors undertake learning activities
- Sort transport
- Make friends with relevant partners
- Translate - probably
- Stay longer – give them something to do
- Iconic imagery in promotion
- Film and film locations, authors
- Be responsive and online
- Create 'Stars'

So what now?

## Market Selector

Use our interactive market selector tool to help identify which markets you might consider targeting in your international marketing. Select from the following categories to refine your recommended markets.

### I am located in

Enter postcode  Select region(s)

### My business is

Category

### My local area is good for

Hold ctrl to select multiple options












- Shopping
- Sightseeing famous buildings or monuments
- Parks & Gardens
- Pubs
- Castles
- Religious Buildings
- Historic Houses
- Museums
- Going on a guided tour
- Visiting the countryside/villages
- Art Galleries

### I currently export my business in

Hold ctrl to select multiple options

- Australia
- Austria
- Belgium
- Brazil
- Canada
- China
- Denmark
- France
- Germany
- Hong Kong
- India

# www.visitbritain.org/visitbritain-opportunities

<p> Consumer</p> <p> Digital</p>  <p><b>GREAT Britain - Home of Amazing Moments campaign</b></p> <hr/> <p>Promote your business and engage directly with potential visitors by sharing content with the hashtag #OMGB</p> <hr/> <p> Free of charge</p>	<p>first selected term will be the default instead of "Any".</p>  <p><b>GREAT China Welcome Charter</b></p> <hr/> <p>Is your business 'China-ready'? We can help Chinese visitors find your business more easily.</p> <hr/> <p> Free</p> <p> Registration open</p>	<p> Digital</p> <p> Trade</p>  <p><b>Supplier directory &amp; itinerary builder</b></p> <hr/> <p>Is the travel trade part of your international sales and marketing strategy? List your product on our travel trade site.</p> <hr/> <p> Free of charge</p>
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Our fortnightly newsletter, provides you with our latest international market intelligence, partnership marketing opportunities, tourism events and news. Fill in your details below to be added to our database to receive the newsletter straight into your inbox each fortnight.

- <https://www.visitbritain.org/sign-our-news>

# Phone/workshops/seminars FREE



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