

# Gourmet Garden Trails

## Final Evaluation Report

### Key messages

- Gourmet Garden Trails (GGT), led by Go to Places (GtP), aims to attract potential visitors from Germany and the Netherlands to visit England's rural countryside by offering itineraries around the theme of gardens and locally produced, gourmet food and drink in five counties: Cheshire, Essex, Hertfordshire, Kent and the Peak District & Derbyshire.
- GGT succeeded in meeting all its target outputs (except for those linked to the TXGB platform development). These included: developing 15 itineraries; delivery of a custom-built website with Trade Hub feature; hosting ten familiarisation trips; training over 115 overseas travel agents; and organising three marketing campaigns.
- The achievement of project outcomes was mixed. Anecdotal evidence suggests that the five counties have increased the visibility of their food and drink, and horticulture offer in overseas markets, where initially they had little or no exposure. However, it will take time before this translates into a higher volume of product sales, which remain low.
- The delayed development of TXGB meant the outcomes which were reliant on the platform have taken longer to be realised, and it was a challenge to maintain business engagement with the project. The differing capacities of DMOs limited their ability to react quickly and engage in all aspects of project delivery.
- GGT continues to be promoted within the wider DMO tourism offer of the five counties. Since the funding period ended, GGT has expanded to an additional two counties (East and West Sussex) and a new partnership with the Royal Horticulture Society is being established to enhance the profile of the project.
- GtP has learned from the experience of delivering GGT and built on this by successfully bidding for the ERDF funded project, 'Experience'. This project aims to help develop the experiential off-season economy in the future across a variety of sectors, including food and drink. In the context of the current COVID-19 crisis, this project will contribute to rebuilding the tourism sector throughout Kent and the surrounding areas in 2020-21.

# 1. Introduction

This is the Final Evaluation Report for the evaluation of Gourmet Garden Trails (GGT) led by Go to Places (GtP), supported by the Discover England Fund. This report is the third and final output of the evaluation work, implementing the approach set out in the Evaluation Plan, agreed with the project and VisitBritain/VisitEngland (VB/VE) in November 2019.

This report will focus primarily on the project outputs and outcomes delivered up until March 2020 (pre-COVID-19), and the anticipated outcomes looking forward (further detail regarding the project activities and anticipated outcomes can be found in the logic model in Annex A). Where relevant, activities undertaken in the first two years of delivery and/or the findings from the Interim Report will be drawn on to contextualise the evidence presented. The purpose of the Final Evaluation is to:

- summarise delivery progress against anticipated activities, including key barriers and enablers, following project completion in September 2019
- provide a final assessment of delivery of project output and outcomes, and progress against agreed targets for 2020 (to March 2020)
- assess the implications of COVID-19 on the achievement of project outcomes to date, and looking forward
- consider the anticipated outcomes/ impact which may be delivered in the future.

## About Gourmet Garden Trails

Gourmet Garden Trails (GGT) aimed to attract potential visitors from Germany and the Netherlands to visit England's rural countryside. Visitors were attracted by offering holiday itineraries around the theme of gardens and locally produced, gourmet food and drink in five counties: Cheshire, Essex, Hertfordshire, Kent and the Peak District & Derbyshire. The project's objectives were:

- to develop bookable tourism products in line with market trends and in response to consumer demands in the food and drink, and horticultural industries
- to change the perception of England's food offer among visitors from Germany and the Netherlands
- to grow the volume and spend of tourists from Germany and the Netherlands to England in the five counties
- to enhance the experience of German and Dutch visitors by building itineraries that offer a diversity of food and garden products.

The project was delivered over two years, from 2017 to September 2019. Note that project delivery started slightly later than most of the other large-scale Discover England Fund projects. This was

due to the delays in the development of the VB/VE online distribution platform (TXGB)<sup>1</sup>, which formed a central part of the GGT project delivery model.

GtP was the lead Destination Management Organisation (DMO) for GGT. The project was delivered in partnership between GtP (GGT lead for Kent and Hertfordshire), Marketing Cheshire, Visit Essex and Marketing Peak District and Derbyshire. The GGT project board, led by GtP, included the county project leads, representation from the travel trade (e.g. House of Britain) and representation from VB/VE. Hertfordshire LEP and South East LEP match funded the project and remained key partners throughout the delivery period. Partnerships were also developed with the transport sector including P&O Ferries, SouthEastern, and Eurotunnel. The not-for-profit Camping and Caravanning Club was also a notable partner.

Each county lead worked with GtP to engage their local horticulture and hospitality businesses and visitor attractions to create bookable products, which GtP combined into itineraries to be marketed to visitors via their custom-built project website. Each business engaged was offered marketing opportunities (e.g. professional photography and videography visits) as well as training to improve their knowledge of overseas markets and how the travel trade operates. The GGT website is linked to the TXGB platform which offers booking functionality for potential visitors.

In February 2019, VB/VE announced that large-scale projects with a budget underspend could apply to re-profile project funding into an additional, fourth year of project delivery. This option was available for projects that had been delayed, either because they had a high dependency on the TXGB platform for their distribution, and/or because they started considerably later than other Discover England Fund projects. GGT successfully applied for this pot, and the project funding was transferred directly from their 2018/19 grant to 2019/20. In line with the additional funding, all projects, including GGT, extended project delivery by six months; from March 2019 to September 2019.

## COVID-19 context

The final evaluation aims to capture the additional outputs and outcomes delivered by the project between autumn 2019 and autumn 2020. The evaluation also seeks to identify the anticipated benefits that the project will deliver in the future, to 2024 and beyond.

COVID-19 and the associated measures implemented by UK Government has and will have a significant negative impact on the potential outcomes achieved by the large-scale DEF projects post-March 2020. The detrimental measures include the international travel restrictions, implemented both in the UK and globally, and the social distancing rules and guidelines, which have prevented tourism (and other) businesses from operating, or have meant that businesses must operate in a different way. The subsequent economic implications have potentially reduced

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<sup>1</sup> The online distribution platform, known as Tourism Exchange GB (TXGB), is a business-to-business digital platform delivered by VB/VE in partnership with technology providers. The platform enables local business suppliers to connect their products to multiple international distributors. Businesses can link their product availability, pricing and content to global distributors (e.g. Expedia; Booking.com).

consumer demand for tourism activities both domestically and internationally, and there may also be some shifts in the forms taken by this demand.

In view of this, the focus of the final evaluation will be primarily on the project outcomes achieved to March 2020. However, the evaluation will also attempt to:

- explore perspectives on what would have happened as a result of the project if the pandemic had not occurred
- assess the benefits that the project has delivered for the relevant destinations and the tourism sector locally, including for local businesses during/through the pandemic; also, how it could help position for subsequent recovery.

Both factors have been incorporated in the primary research, as set out in the methodology section below.

## Methodology for the final evaluation

The methodology to inform the Final Evaluation Report included a mixed method approach:

- a review of project monitoring documents and data, including project funder presentations, travel trade brochures and DMO tourism data
- a consultation with two project leads
- two consultations with project partners and stakeholders
- one consultation with a travel trade representative
- an e-survey of 11 local horticulture and hospitality businesses.

The findings from the e-survey are set out in Annex B. Given the low response rate, the responses have not been included in the main body of the report.

The evidence generated from the research has been triangulated and is set out in the relevant sections below.

## Structure

The remainder of the report is structured as follows:

- Section 2: Overall reflections on project delivery
- Section 3: Achievement of outcomes
- Section 4: Conclusions and key learning.

## 2. Overall reflections on project delivery

### Progress against outputs

A final evaluation monitoring form was completed in October 2020 by the GGT project leads, a year after completion of the project in September 2019. This section provides a summary of the outputs delivered by the project up to the 31 August 2020; this period includes the project extension period and the re-profiled funding.<sup>2</sup>

GGT succeeded in meeting all its target outputs (except for those linked to the TXGB platform development) – note that additional outputs have also been achieved since project completion in September 2019:

- Across the five counties, 15 itineraries were developed and promoted on the custom-built, B2C website ([www.gourmetgardentrails.com](http://www.gourmetgardentrails.com)) meeting the original target. These new products are supported by 15 promotional videos (three per county) and 10 image libraries (two per county), exceeding the target for the delivery of five videos and five libraries by 2019.
- Across Kent, Hertfordshire and Essex, 60 businesses participated in training workshops focused on the aims and objectives of the project, and how the travel trade and overseas markets operate.
- GGT products were promoted in three wider, ‘pay-per-click’ marketing campaigns, which went live in autumn 2019, exceeding the targeted two by 2019. Of these campaigns, two were delivered in partnership with House of Britain and one was in partnership with SouthEastern, which targeted regional and London train stations.
- The project has been promoted at seven travel trade shows: five international and two domestic. These were: Vakantiebeurs in the Netherlands (2018, 2019 and 2020), ITB in Germany (2018 and 2019), WTM and Explore GB. This exceeded the 2020 target of six. A GGT toolkit for the travel trade was also on offer at these shows.
- Ten familiarisation visits were hosted across the five counties (against a 2020 target of eight) and over 115 overseas travel agents were trained on selling GGT products.

### Key barriers and enablers

The evidence from the consultations suggests there were various key barriers and enablers in project delivery. Table 1 presents six key barriers and enablers.

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<sup>2</sup> Note that due to the delay in project delivery, the evaluation plan, including targets for outputs and outcomes, were only agreed in 2019, after the project completed delivery. Due to this, the targets cannot be used as a baseline assessment of progress.

**Table 1: Key barriers and enablers to project delivery**

Enablers	Barriers
<ul style="list-style-type: none"> <li>• <b>Creation of a ‘Trade Hub’ for B2B engagement:</b> the ‘Trade Hub’, which was integrated on the GGT website, enabled the travel trade to access and download GGT itineraries and promotional images/ videos and to find and contact GGT local businesses. This also allowed travel trade partners to incorporate elements of GGT products, rather than whole itineraries, into their existing products, widening the reach of the project. Project leads reported that feedback from the travel trade suggested this feature was a new approach which they found useful. GtP is now considering how to use this approach across the wider DMO to create a VisitKent Trade Hub.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Delay in the implementation of TXGB:</b> project leads suggested that GGT delivery was delayed by at least six months. The platform was intended to provide a ‘bookability function’ for products and was a crucial element in the distribution of GGT products. The team considered bookability as the ‘innovative’ element of the project which was essential in transforming the information on the website from ‘inspirational content’ into a bookable product (which was the intended outcome).</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Existing relationships between DMOs and local businesses:</b> project leads and county project leads reported that this enabled the project to engage businesses and build momentum quickly. For example: Kent, Cheshire and Essex, have existing, high-profiled networks of gardens (domestically), which could be drawn on to engage businesses (e.g. Cheshire’s Gardens of Distinction; Essex’s flagship gardens of RHS Garden Hyde Hall and Marks and Kent’s ‘Garden of England’ profile). In the Peak District and Derbyshire, strong relationships with prominent food and drink businesses existed through the DMO’s patrons Thornbridge Brewery and the Bakewell Pudding Shop. These connections meant that the project had a group of businesses ready to engage from the outset of the project.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Business capacity to engage with TXGB:</b> most DMOs described that onboarding businesses had been time consuming and resource intensive for the DMOs and their local businesses. The project county leads had to contact businesses multiple times to encourage them to sign-up, and businesses were required to complete forms about their business offer and include images or be available to participate in photography and videography shoots. Project leads were also concerned that lengthy onboarding process would discourage businesses that were engaging from completing the process.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Flexibility of DMOs to take on new roles in product design and development:</b> from their product marketing role, the DMOs adapted to provide business advice on product development, pricing and legal terms and conditions. One county project lead commented on how their role had evolved and required greater resource to increase their knowledge in these areas. This willingness to adapt has meant the capabilities of DMOs have broadened and this new learning now informs their wider work and activities.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Varying levels of resource and capacity among participating DMOs:</b> DMOs varied greatly in their size, structure and resources. This meant that the level of engagement and responsiveness differed between project partners. For example, some county project leads struggled to submit information on time or invest time in specific aspects of the project. One project lead described that greater understanding was required between DMO partners about their level of resources and how each organisation operates. This would manage project partners’ expectations of inputs.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Consistent branding enabled by DMO collaboration:</b> it was important for the</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Limited flexibility in how funding could be allocated:</b> Project leads felt that the project</li> </ul>

Enablers	Barriers
<p>project to have consistently themed content, showing the similarities in offers across the five counties while also identifying unique features in each area. By sharing media partners, counties were able to create content in a consistent style. This content was central to advertising at the travel trade shows and was also sold to varying media outlets.</p>	<p>could have been delivered more efficiently if there was greater freedom in how the Discover England Fund funding could be allocated. For example, GtP is a well-resourced DMO and could have delivered more project activities in-house. However, the funding had a limit of 20 per cent for internal spends, which meant they had to commission externally for activities that they could have provided themselves - which would have been more cost efficient. Project leads felt that internal delivery would have made the project more sustainable, rather than paying for temporary external expertise.</p>

Source: SQW analysis

### 3. Achievement of outcomes

#### Increased visibility of English food and drink, and horticulture products within Dutch and German markets

Prior to GGT, there was little promotion of food and drink, and horticulture-based tourism products to the Dutch and German tourism markets. Evidence from the consultations indicates that, as a result of the project, the visibility of English food and drink, and horticulture products within Dutch and German markets has increased:

- GGT products are promoted by GtP at all the travel trade shows they attend, both to domestic and international markets
- GGT products are promoted by seven international travel trade operators (e.g. TUI)
- GGT advertising campaigns ran on P&O Ferries and Eurotunnel services during 2019
- local food and drinks and horticulture businesses (across the five counties) are engaging directly with the travel trade in the Netherlands and Germany to market their products.

Project county leads commented that GGT has raised awareness of the five counties in the international market and allowed the variety of products to be showcased. Travel trade engagement on the project was described as a key enabler of this. This had resulted in tangible outcomes, in terms of the number of itineraries promoted by large partners, such as TUI. The press familiarisation trip was also key in broadening journalists' awareness of the range and quality of the local good products on offer.

Both project leads and county leads agreed that the international promotion of the five counties, and their relevant offers, would not have happened without the GGT project, due to limited resources and a lack of international trade and marketing contacts.

While project leads were positive about the increased visibility for food and drink, and horticulture products within Dutch and German markets, one travel trade operator commented that this awareness was still limited to the travel trade shows. They suggested there was little visibility out of this space, and this could be improved. Note that only one travel trade representative was consulted with as part of the final evaluation, therefore it was not possible to corroborate this view with other travel trade perspectives.

While the funding period ended in September 2019, a wide-scale marketing campaign was launched in autumn 2019 across the five counties to continue to promote GGT; this included a competition with prizes such as a free Eurotunnel crossing, and free vineyard tour tickets. Further promotion and awareness raising activities were planned for 2020, including additional trade and press familiarisation trips. These would have arguably contributed to increasing the visibility of GGT products in Dutch and German markets. However, both the competition prizes and visits were cancelled due to COVID-19 and rescheduled for 2021. Although these activities will still go ahead, project leads felt that the momentum of GGT had been lost and, as a result, the products will take longer to embed in the international markets.

### **Increased networks of rural tourism businesses (South East, North West, West Country)**

The evaluation did not find evidence of increased networks between rural businesses. This may be, in part, as it was not possible to engage or consult with a large number of businesses, due to the sensitivities surrounding the pandemic. However, through GGT, there is evidence to suggest that DMOs have engaged with businesses outside of their membership and current activities. One county project lead felt that GGT offered smaller food and drink, and horticulture businesses an opportunity to promote their products to overseas markets. Having a marketing project specific to their sector was more attractive to them than the wider DMO offer to incorporate products into general tourism marketing. Most project and county leads commented that engagement with GGT led to greater engagement of these businesses in the wider work of the DMO and its network of business members.

GGT has continued to accept businesses who are interested in participating in the project post-project completion and this has led to new local foraging and food and drink products being available to potential customers. As well as this, the project is in talks with the Royal Horticultural Society to incorporate their gardens' products into the GGT itineraries. This would increase the diversity and, potentially, the profile of the project.

### **Businesses are more aware of German and Dutch visitor expectations and needs**

Initially, GtP planned to run business training workshops specifically addressing German and Dutch visitor expectations and needs; the training was informed by market research undertaken by the project in 2018. However, in 2019, VB/VE launched a central business training programme for all Discover England Fund projects, namely 'Taking England to the World'; this was delivered in



2019/20. Projects were expected to encourage their participating businesses to attend the central training. The training aimed to support businesses to understand how to develop and promote their products for sale in international markets and to learn about travel distribution systems and how they can be used effectively. The training did not focus specifically on projects' target markets (i.e. for GGT, the German and Dutch market). Therefore, project leads were uncertain of the extent to which the GGT linked businesses were more aware of the specific needs and expectations of German and Dutch visitors; although their awareness of operating in international markets was expected to have increased.

Two other factors have affected this outcome:

- wider business support training was provided to businesses in one county through an ERDF funded project which meant there was less demand from businesses for additional training
- some businesses were already catering for international visitors and were aware of their expectations and needs; therefore, training on this was not required.

### **More businesses utilise booking systems (via TXGB)**

TXGB was launched in June 2019, however, progress against the TXGB related outcomes has been relatively slow:

- against a target of 60 by 2020, seven businesses (based in Kent) had been onboarded to TXGB by August 2020
- the 15 itineraries on the GGT website are not yet live on TXGB platform.

There have been two main barriers in achieving the TXGB outcomes:

- lack of business capacity to engage in the onboarding process slowed progress on this outcome: county project leads experienced difficulties getting businesses to sign-up and had to contact businesses multiple times to encourage them to do so; some DMOs felt that this approach was very resource intensive which also hindered the sign up process
- the COVID-19 outbreak, and the associated government restrictions, has hindered the process of onboarding businesses:
  - during the initial lockdown there was little capacity within GtP to onboard businesses (due to reduced staff capacity through furlough) and all focus was on supporting member businesses who were facing financial pressures and temporary closures
  - following the easing of restrictions (in places), tourism businesses have focused on managing capacity internally and capitalising on opportunities in the domestic market. As TXGB was focused initially on international markets, consultees described that businesses did not have the time to prioritise engaging with the project and TXGB.

Currently, Visit Kent is trialling the suitability of TXGB and is in the process of uploading GGT products and itineraries to the platform. To support projects with onboarding businesses, VB/VE

has also increased their capacity to work with businesses. A list of businesses has been shared with VB/VE, but the project is currently unclear what has been achieved through this route.

## Availability and commercial sales of new travel products

To date, there has been limited evidence of sales of new products: the project achieved 129 bookings through the travel trade by August 2020, which fell far short of the anticipated 5,525 bookings from independent travellers or the travel trade by the end of 2020.

Reflecting on the targets, the project leads felt that the initial sales target was too ambitious for the timeframe and did not account for the time it would take for the products to be picked up by the market and for the break in sales for the 'off season'. The impact of COVID-19 and the restrictions on international travel meant that additional sales after March 2020 were unlikely. However, consultees said that even without COVID-19, it is unlikely that the 2020 booking target would have been met due to the delays the project experienced resulting from the delayed development of TXGB.

## Impact of COVID-19

### Impacts on project outcomes

Project leads described that COVID-19 effectively halted the momentum GGT was building, following the end of the funding period in September 2019, and this has had a knock-on effect on the project's ability to achieve its anticipated outcomes.

Given the initial UK ban on non-essential travel and the uncertainty of when European countries, such as the Netherlands and Germany, will re-open to tourism (currently both are in national lockdown), this situation severely impacts potential marketing opportunities (limiting the visibility of GGT) and potential product sales for 2021 and beyond.

As mentioned above, COVID-19 had also impacted on businesses ability to engage in wider strategic activities, such as working with GGT, as they are currently focused on business survival. Looking forward, the number of businesses within the five counties in the food and drink, and horticultural sectors that will remain trading in 2021 is unclear. For those that remain operational, their capacity to onboard to TXGB and network with other local businesses is uncertain at this time.

### Effects on continued delivery

Although the funding period ended in September 2019, the project intended to continue elements of project delivery after this period, with a view to maintaining visibility of, and promoting the GGT products. Since March 2020, the COVID-19 pandemic has affected continued project delivery in four ways:

- **GGT promotional competition postponed to 2021** - the competition was designed to increase profile by offering related prizes from sponsors and partner businesses such as a free

Eurotunnel crossing and free vineyard tour tickets. It was hoped this would encourage an increase in product sales and visitor numbers in 2020.

- **Cancellation of ITB Berlin 2020** – this meant the project was not able to attend as usual and didn't have another opportunity to promote GGT and boost relationships with tour operators. These trade shows are increasingly important for the sustainability of GGT, as the project relies on promotion opportunities through wider DMO tourism promotion now that the funding period has ended.
- **Go to Places capacity and priorities** – the capacity of the team to deliver GGT, and other business objectives, was limited as staff were furloughed and there were reduced staff numbers. As a result:
  - between March to September 2020, business priorities changed to focus entirely on business-to-business (B2B) operations, by responding to, and supporting, local businesses in Kent; this meant business-to-consumer (B2C) work was paused
  - while project leads have contacted businesses to check their trading status and ability to respond to GGT enquiries, they do not have the capacity to keep up to date with which products are still viable and which are no longer available; there is also limited capacity to update the website with new or amended offers.

### Return on investment

As outlined above, the pandemic, and the associated government restrictions, has had a significant detrimental impact on the tourism sector. As such, project outcomes such as consumer bookings and visitor numbers have not been realised as anticipated. Due to this, there is insufficient evidence to calculate a robust, final Return on Investment (ROI) for the project. The anticipated ROI for the project, which was forecasted in the project Evaluation Plan, was 1:1.38 by 2020 and 1:3.11 by 2024.

While the tourism industry is projected to return to some form of normality by 2024, when the sector recovers in aggregate terms, and the form this recovery will take, is unclear at this stage. Consequently, the long-term impacts of GGT, in terms of increasing Dutch and German visitor numbers, the duration of visitor stay and spend, are not evident at this stage. Consultees anticipated that COVID-19 will have displaced the impacts of GGT and expect that numbers of Dutch and German visitors will increase, but over a longer timeframe.

### Impacts on sector recovery

Due to the nature of the GGT products, project and county leads felt the products were more relevant to rising domestic consumer demand for safer, outdoor experiences (e.g. visiting garden attractions, touring vineyards, outdoor dining). One county lead also felt that the products were a good year-round offer which is more important this year as the tourism sector tries to extend the season to recoup some losses. Having a tourism offer available all season to domestic and/or international visitors is likely therefore to aid the recovery.

## 4. Anticipated future outcomes

Despite the challenges posed by the delayed project start and the COVID-19 pandemic, consultees were positive that further progress, or the achievement of two outcomes would be realised in the future.

### Availability and commercial sales of new travel products

By 2024, 12,500 independent or travel trade GGT bookings are targeted. GGT products are available to purchase and remain relevant and viable despite the impact of COVID-19. While bookings through the travel trade have been relatively low to August 2020, the project has observed greater interest and take-up of the products among domestic visitors. As noted above, the products are relevant to rising consumer demand for safer, outdoor experiences (e.g. visiting garden attractions, touring vineyards, outdoor dining) and are easily adapted for a domestic audience. One county lead reported that in 2020 their garden attractions saw their busiest July to September period on record. It is not clear how long consumer demand for outdoor experiences will remain, however, the current levels of domestic interest indicate that bookings are likely to sustain or to increase over the next 1-2 years.

When international tourism returns, there may also be increased demand from European markets for outdoor experiences and thus, increased bookings of GGT products among the target markets. However, the timescales for this, and the form which this will take is unclear at this stage.

Another factor raised by project leads is the effect of Brexit on future bookings and visitors numbers. This is particularly important for two of GGT's main counties: Kent and Hertfordshire. The GGT project targets the self-drive market, through the port of Dover, to visit the respective counties. Due to the new custom arrangements, it is reported that there is likely to be delays at the Dover crossing and increased congestion in Kent.<sup>3</sup> This could impact on the appeal of the destinations to tourists, and thus result in fewer bookings than anticipated.

### Increased visibility of English food and drink, and horticulture products within Dutch and German markets

Since the end of the Discover England Fund funding period, the project has received £84k of funding through the Sector Support Fund and the South East LEP. This has enabled the project to extend GGT to two additional counties: East and West Sussex. These two counties are already popular with Dutch and German visitors and have a strong food and drink, and horticulture offer established, with attractions such as Arundel Castle and Gardens, and Nymans Garden. The expansion focuses mainly on the domestic market, however, new products are expected to gain international exposure through the online Trade Hub. This is expected to contribute to broadening the English

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<sup>3</sup>Dover District Council. Kent Resilience Forum outlines end of transition contingency plans (December 2020) <https://www.dover.gov.uk/News/Press-Releases/2020/Kent-Resilience-Forum-outlines-end-of-transition-contingency-plans.aspx> (Accessed 17 December 2020)

food and drink and horticulture offer to the travel trade and sustaining the visibility of GGT in Dutch and German markets.

## 5. Conclusions and key learning

### Summary of findings

Overall, the project succeeded in delivering all outputs (except for those linked to the TXGB platform development) and have continued to deliver additional outputs since project completion in September 2019:

- GGT itineraries are marketed on a custom-built website with specifically curated promotional materials covering the five counties
- these itineraries or individual products are accessible to all interested travel trade agents through the online Trade Hub and actively promoted by seven travel trade operators and over 115 trained agents
- the counties hosted ten familiarisation trips to promote the project, attended seven travel trade shows and launched three broader marketing campaigns to build momentum in the overseas markets.

These achievements were possible due to the strong collaboration between the DMOs involved, the strength of existing relationships with key local businesses, and the ability of DMOs to take a more active role in product development.

Despite the delays with TXGB, progress has been made against the project's intended outcomes (to March 2020). Anecdotal evidence from interviews suggests there is increased visibility within business-to-business overseas markets of the food and drink, and horticulture tourism offer in England. However, awareness among consumers may be more limited to those who attended travel trade shows and witnessed key transport operator campaigns. Business engagement with TXGB remains low and few businesses having been onboarded to the TXGB platform at present. However, DMOs described that their business networks have grown through their business engagement activities within the project.

It is expected that domestic bookings will increase over the next 1-2 years. However, international bookings are less certain. Consultees described that it is possible that international bookings will increase over the next 2-3 years. However, it is difficult to robustly estimate the volume of bookings due to the uncertainty of how long the COVID-19 restrictions will remain, in addition to the potential implications of Brexit for European tourism. This is likely to become clearer over the next 12 to 18 months.

In terms of sustainability, the project will continue to deliver the following activities over the next year:

- expansion of GGT to two new counties (East Sussex and West Sussex) and incorporating new partners such as the Royal Horticultural Society to maintain the project's profile, financially supported by the Sector Support Fund and the South East LEP for 2020/21
- promotion of GGT within all seven DMO tourism marketing strategies in seven counties (Kent, Hertfordshire, Peak District and Derbyshire, Cheshire, Essex, East Sussex and West Sussex)
- delivery of a new project building on GGT key sectors, GtP's ERDF funded 'Experience' project.

However, the long-term legacy of GGT is dependent on partner buy-in. As noted above, the DMOs have varying levels of resources which means capacity to engage is limited in some cases. This issue has been exacerbated by the financial implications of COVID-19. Project leads are considering how best to sustain elements of GGT with consideration of partners' capacity. For example, involving destinations in the marketing and promotion of existing products.

## Key learning

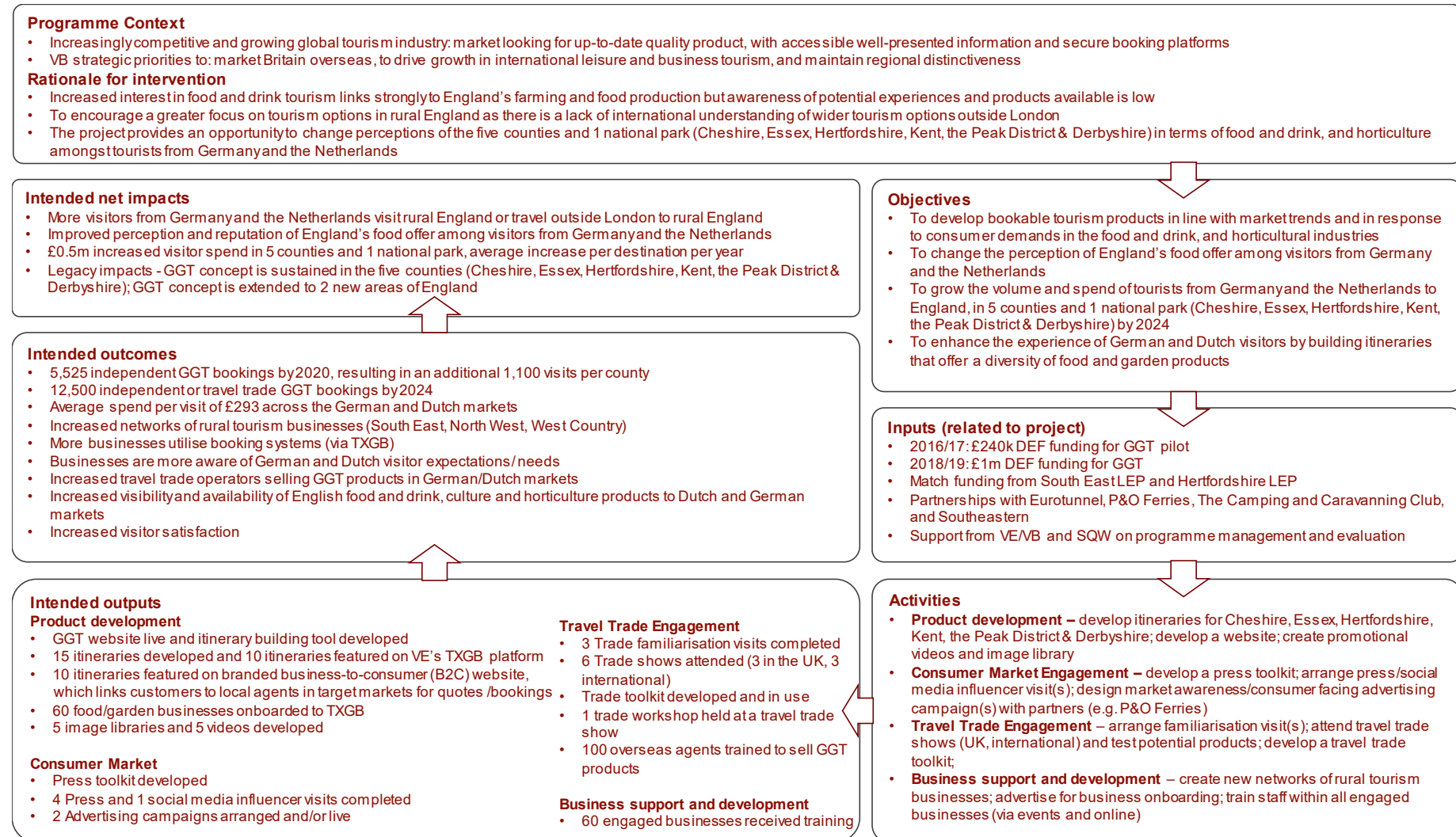
There are several areas of learning which have been generated in project delivery, including learning for the GGT project team and learning for the broader Discover England Fund programme. The learning, set out in Table 2 below, is expected to inform the delivery of future projects delivered by the GGT project leads and future interventions delivered by VB/VE.

**Table 2: Key learning**

Project team	Discover England Fund programme
<ul style="list-style-type: none"> <li>• <b>To ensure that the projects leads have a greater level of input to the project bid:</b> project leads described that there was a mismatch between the development of the bid and the delivery of the project. At times, project leads were constrained by what had been set out in the bid and felt that more could have been achieved had they been involved in the designing the bid.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>To understand the existing tourism infrastructure and capabilities within the market to inform the programme design from the outset:</b> it was considered that the demand for a national, centralised B2B booking system could have been anticipated in the design of the Discover England Fund programme. This would have meant that the platform was developed in the early stages of the programme and would have been available to support and distribute the launch of Discover England Fund products in the market.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>To secure increased business engagement in the design of the products:</b> The GGT project bid team intended to take available products that they knew local businesses were promoting already, and package these into bookable experiences to be marketed internationally. However, project leads who delivered the project believe that this approach was too 'top down' in its organisation and didn't have enough business buy-in from the start. This meant it was harder to engage businesses to onboard them and harder to build on the basic products to</li> </ul>	<ul style="list-style-type: none"> <li>• <b>To increase the communication and updates to projects on the progress of central activities:</b> in the early stages of TXGB development, project leads described that more consistent communication could have been issued to projects regarding the intention and timescales for TXGB. In addition, where projects provided content or products for the programme central activities, the project leads described that they would have benefitted from feedback or updates from VB/VE as to how their products and content were used. For example, the project team uploaded and</li> </ul>

Project team	Discover England Fund programme
<p>develop other more creative experiences. GtP have taken this learning and through their new project, 'Experience', they are working with businesses to develop the products from the 'bottom up' to get buy-in from businesses early on in the project.</p>	<p>shared GGT content with VB/VE, however, they were unclear whether this was reviewed and/or used.</p> <ul style="list-style-type: none"> <li> <p><b>To allow projects to have a greater level of flexibility in project delivery to adapt to changing circumstances:</b> the project's experience was that, once the target (international) market was identified, the project was unable to adapt this to focus on and/or include other markets, particularly when relevant opportunities arose. As a result, the project described that some opportunities were missed.</p> </li> </ul>

# Annex A: Logic Model





## Annex B: Business Survey Findings

This section provides an overview of the key findings of a business survey that was completed in Autumn 2020.

### Business characteristics

The survey was completed by 11 respondents, giving a response rate of 6.6% based on the 167 business it was sent to. These businesses were spread across five different counties.

**Table 3: Location of businesses (N=11)**

Region	Number of respondents
Kent	3
Essex	1
Derbyshire	2
Leicestershire	1
Cambridgeshire	1
No response	3

*SQW based on GGT business survey*

There was a variety of business types amongst the respondents including visitor attractions and eateries. Three businesses selected “other” types of business, these are: a garden/plant nursery, a brewery and a wine estate.

**Table 4: What type of business are you? (N=11)**

Business type	Number of respondents
Hotel	1
B&B/ guesthouse	1
Self-catering accommodation	0
Holiday parks/ caravan/ camping site	0
Café/pub/restaurant	2
Visitor attraction	2
Activity provider	0
Transport provider	0
Travel agencies/holiday packagers	1
Other (please specify):	3
No response	3

*SQW based on GGT business survey. Note: several respondents selected more than one business type.*

In terms of the business size, all of the businesses that answered this question were relatively small (under 50 employees).

**Table 5: How many people does your business employ? (N=11)**

Number of employees	Number of respondents
Less than 5	2
5 to 9	3
10 to 49	3
50 to 249	0
250+	0
No response	3

*SQW based on GGT business survey*

### Involvement with GGT

Businesses were involved with GGT in a variety of ways: one received one to one business support; one attended workshops or events and two were involved with the development of itineraries or experiences. One also noted that they were listed on the GGT website and one said that they received information from the project. None of the respondents used toolkits or other resources that were produced by the project.

The earliest involvement amongst the respondents was October 2017. Two more began their involvement in 2018 and a further four in 2019, with the latest beginning in May 2019. Four businesses did not answer this question. Five respondents said that they are still involved with the project, as they are listed on the website.

**Table 6: Are you still involved with the Gourmet Garden Trails project? (N=11)**

Answer	Number of businesses
Yes	5
No	3
No answer	3

*SQW based on GGT business survey*

### Reflections on GGT

Three respondents could provide details on the best aspects of the project, these were:

- the concept
- the project's ability to create awareness in overseas markets
- the potential to increase overseas visitor numbers

Businesses said that the project could be improved through:

- enhancing the usability of the website
- improving feedback processes so businesses can better understand how their product/service was received

- increasing the level of communication with businesses

## Impact of GGT

Some businesses reported that, before the pandemic, they experienced a number of positive outcomes from their involvement with GGT, such as an increased awareness of overseas markets and improved links with other tourism businesses.

**Table 7: Before the pandemic, did participating in Gourmet Garden Trails have any effect on the following? Rate on a scale of 1 to 5 where 1 is no effect and 5 is a significant effect. (N=11)**

	1	2	3	4	5	NA	No response
Your awareness of overseas markets in general	4	0	1	0	0	3	3
Your awareness of German and Dutch markets in particular	3	0	2	0	1	2	3
Your understanding of overseas visitors' needs	3	1	1	0	1	2	3
Your confidence in dealing with overseas visitors	2	2	0	0	1	3	3
Making your offer more accessible to overseas visitors	3	2	0	0	1	2	3
The quality of your offer to overseas visitors	3	1	1	0	1	2	3
Your links with the travel trade	2	2	2	0	0	2	3
Your links with other tourism businesses	3	1	2	0	0	2	3
Your understanding of what the area offers visitors	3	1	0	1	1	2	3

*SQW based on GGT business survey*

However, these improvements did not result in an effect on business performance for any of the businesses.

**Table 8: Before the pandemic, did participating in Gourmet Garden Trails have any effect on the performance of the business?**

Answer	Number of respondents
Yes	0
No	5
Not sure	3
No response	3

Looking forward, one business expects that GGT will improve the performance of their business in the future. A further three were not sure and four said it will not affect performance.

**Table 9: Do you anticipate that participation in Gourmet Garden Trails will/could have an effect on business performance in the future (i.e. in two or more years)? (N=11)**

Answer	Number of respondents
Yes	1
No	4
Not sure	3
No response	3

*SQW based on GGT business survey*

In the context of the global pandemic, none of the businesses said that the project had improved their resilience. One respondent said this was down to the fact that their application was not progressed. A further two said that it was because the project did not help them to increase their visitor numbers. However, one business did say that they expect the number of overseas visitors to grow, suggesting that they expect GGT to improve resilience in the future.

### Final reflections

No further benefits were noted by any of the respondents. One business has been involved with another DEF project (National Parks).