

Executive Summary

It could be argued that culture and heritage is the most important part of Britain's tourism offering as at some point it touches every visitors' trip to Britain. Culture is the single most important motivation for city trips, although relatively few visitors view themselves as 'cultural tourists'. However, whilst most wouldn't classify themselves as cultural tourists, research has shown that almost all tourists are interested to learn and experience the culture of the destinations they visit.

Importance to Tourism

57% of respondents from 20 countries agreed that history and culture are strong influences on their choice of holiday destination (only 15% disagreed), so it is clear that destinations excelling in this area are likely to be high on travellers' consideration lists. Britain's success in marketing itself as an enticing tourist destination will ultimately hinge on the way it presents its best assets which, as the following section shows, largely revolve around its culture and heritage.

According to the Nation Brands Index, in terms of Culture, the UK is perceived to be the fourth best nation out of fifty. This is as a result of Britain being seen as the 4th best nation in terms of having an exciting contemporary culture (eg music, films, art, and literature), 7th as a nation with a rich cultural heritage, and 8th as a nation excelling at sports.

Britain is ranked 5th in terms of 'Tourism', partly thanks to its rich built heritage (4th) and vibrant and exciting cities (4th). All in all the UK is seen as a highly aspirational destination to visit (ranking 8th).

Culture and Heritage tourism's importance is further demonstrated in the proportion it contributes to the tourism economy. VisitBritain estimates that Britain's unique Culture and Heritage attracts £4.5bn worth of spending by inbound visitors annually, equivalent to more than one-quarter of all spending by international visitors, and thereby underpins more than 100,000 jobs across the length and breadth of Britain.

The 3 Pillars of Cultural Tourism

There is universal agreement amongst the tourism industry that Cultural Tourism is an incredibly difficult thing to define and there seems to be little agreement on what actually constitutes "Cultural Tourism". Additionally it can be difficult to separate 'Culture' and 'Heritage' in the mind of the consumer as they are inherently linked. Britain's culture and heritage offering is expansive and exists in many different forms such as built/historical heritage, popular culture, living culture, shared culture, cultural events, culinary culture, and cultural products to name but a few. However, when we drill down, three key pillars seem to exist: Cultural Heritage (eg Shakespeare), Built or Historical Heritage (eg Tower of London) and Contemporary Culture (eg modern art, theatre).

Different mindsets underpin trips to Britain and visitors often act on a continuum of experience from the shallow ("doing the attractions"; "been there, done that"; "ticking off the list") to the deeper more meaningful experiences. With the latter, there can be more profound interest in Britain and attractions eg the significance of attractions. Even when culture is not the primary motivator for travel, visits to cultural attractions are still an important part of the holiday experience.

The Role of Cities

City tourism and culture have a strong partnership – they are highly interrelated although many city trippers don't define themselves as "cultural tourists" despite the activities they are undertaking. As we have seen there are different types of "cultural tourists" and there are opportunities to address their motivations in different ways. Cities that are able to offer new reasons for a visit will be in a much stronger position to face the competition. This involves the need to reinvent the wheel and present new cultural tourism products to consumers.

Built Heritage

Britain's rich history and heritage continue to be strong drivers in attracting visitors. Famous buildings and monuments, castles and stately homes, and churches/cathedrals are all well regarded and interest is reflected in visit numbers. Britain is seen as a world-class destination in terms of its built heritage, ranked 4th out of 50 nations in the Nation Brands Index (2009). The UK's built heritage is most highly regarded in Australia, the USA, Canada, and South Africa, but almost all nations and age groups see Britain's built heritage as a priority if they were to visit Britain, so it should be very prominent in marketing materials.

It is essential that Britain is seen not only as a destination with a world-class historical offering, but also as an exciting destination, with the power to surprise and engage visitors on a more emotional level. One way this could be achieved is by combining Britain's heritage with contemporary activities; castles hosting live concerts, museums holding fashion shows, or adrenaline-packed speedboat rides on the Thames. Research has shown these sorts of concepts to be particularly exciting for potential visitors.

Cultural Heritage

Britain is ranked 7th out of 50 nations in terms of its cultural heritage (NBI) and is most highly regarded in the USA, Australia, Canada, South Africa, Poland, Argentina, and Russia. Countries that have ancestral or historical links with Britain are interested in Britain's cultural heritage, as to a large extent this is considered part of their own.

As each nation of the world has their own culture and customs, it would be naive to assume that each nation would find every aspect of Britain's cultural heritage appealing. In fact, there is a great deal of variation in the way that nations perceive it, but the positive story is that the diversity of Britain's culture means there is something for everybody.

Visiting museums is regarded as the 4th best activity in Britain (out of 32) and ranks 3rd on potential visitors' to-do-lists - a key strength for Britain and a motivator to visit. Museums are slightly more appealing for older visitors than younger ones, but younger visitors still see themselves as very likely to visit museums if they were to visit Britain, and visitor statistics show they do.

Going to a pub in Britain is far more appealing to more mature markets. British pubs ride high consistently on the list of positive perceptions about Britain. Research shows that the traditional British pub has a role to play in improving perceptions of welcome along with offering authentic eating and drinking experiences.

Shared culture is seen to be very important in many markets. For many Europe is a key part of their heritage and many associate it with their own heritage. A large part of Britain's attraction comes from the perception it has looked after and nurtured its past. There is a sense of emotional familiarity and comfort with Britain as many have grown up seeing, reading and hearing about Britain.

Britain is the birthplace of many sports which makes them appealing to watch whilst in Britain. It is not only the thrill of watching sport that attracts overseas visitors, many make a pilgrimage to Britain in order to participate in sport. Football is a success story and is of particular interest to men, with younger age groups most keen on going to a match. Ireland and Norway are key markets, but Asia loves the Premier League too.

Executive Summary (continued)

Britain's royal heritage plays a crucial role both through the built heritage legacy of monarchy and through the many legends and stories associated with royalty. In 2008 nearly five million experienced one of the properties overseen by either Historic Royal Palaces or the Royal Collection. English Royalty is linked to Britain's strong tradition and heritage image and 'royalty' and 'the Queen' are key associations that people have with Britain.

The image of Britain we often find is influenced by that depicted in books. These are often reinforced by the Britain that people from these countries learn about at school.

British food still comes up as an issue in overseas markets; it's almost a hardened stereotype, but also a very subjective one and one which will vary. We also know that food and eating out is an important driver to many tourists but research shows that a "good range of local food and produce" and a "wide choice of food from different cultures" is still seen to be a weakness for Britain.

Contemporary Culture

Britain is ranked 4th out of 50 nations in terms of having an interesting / exciting contemporary culture such as music, films, art and literature (NBI, 2009), and 4th in terms of its vibrant and exciting cities. The UK's contemporary culture is most highly regarded in Sweden, Poland, Australia, South Africa, Russia, Argentina, and Mexico.

Amongst the youth market, the UK is seen as a great destination for music, fashion and alternative scenes. From a youth perspective, the US, France, Italy (and Spain to a lesser degree) are Britain's biggest competitors.

VisitBritain's research and analysis shows that Contemporary Cultural activities often appeal more to particular age groups or nationalities than others. This means it is particularly important to understand your audience when marketing these sorts of activities.

Many contemporary activities currently appeal more to nations with cultures not dissimilar to Britain's. On balance, the Nordic nations are most keen on these activities (especially night-time activities), whilst other Western European nations, the Americas, and Australasia are much more positive than Asian nations (for whom shopping clearly holds the most appeal).

Hitting the shops is not rated as one of the best activities to do in Britain by potential visitors (it has strong competition from many other activities), but it is seen as an activity that many see themselves as likely to do if they were to visit Britain, especially females.

Films can be used as a good PR tool to promote Britain overseas. However it should be noted that visiting places from films/tv is rated as the 25th best activity in Britain by potential visitors (out of 32). Furthermore, the small proportion of visitors going to film locations demonstrates that these are very much niche activities for visiting.

Going to bars or clubs in Britain is far more appealing to residents of Europe, the Americas, and Australasia than to residents of Asia. The Nordic nations see Britain's bars/clubs as one of the most exciting aspects of a trip.



Britain has long been a pioneer in terms of leading world music, but going to live music events is not a top priority for many potential visitors (19th out of 32 activities). We need to remember that music is not a key driver to visit Britain but something that people may be interested in doing once in Britain. It should be considered 'a hidden opportunity'; encouraging more visitors to go to live music events, cultural events, and festivals once they have decided to come to Britain should enhance their experience and make recommendations and return visits more likely.

Over the centuries, Britain has had a huge amount of influence on world culture and many visitors have an interest in British icons and symbols they have heard so much about. However not all nations identify with modern British cultural icons. Our challenge is to educate prospective visitors that Britain is a cosmopolitan destination with a wide range of experiences and activities on offer. However we need to be careful to only accentuate the positives of cosmopolitan Britain as this "cosmopolitanism" doesn't necessarily appeal to everyone.

The key to success

Britain's mix of "culture" is key to our success: from heritage, the arts, museums, through our creative industries (eg fashion, music, design, media) to living / contemporary culture (eg language, traditions, festivals, sport, cuisine). While some visitors exhibit a more profound interest in learning and understanding rather than just seeing sights, a much larger proportion are involved in "cultural activities" just by their involvement in enjoying the intangibles of a place - soaking up the atmosphere and watching life pass by.

So going forward, in order for Britain to survive as a mus- see destination and to keep giving visitors a reason to keep coming back, British tourism needs to look at how it presents its culture and heritage as an inspiring mix of the old and the new. In communications we must show that Britain is an evolving country and society, a dynamic evolution of food, music, fashion, mix of people – a cool and modern society, yet that it still retains its quintessential British values of fairness, confidence, humour and outward focus. It is crucial to move people beyond perceptions of Britain as a stagnant society stuck in post-war England and allow them to experience the heart of genuine, evolving Britain which has managed a synthesis between old and new.

