VisitBritain

# Foresight – issue 145

# Leveraging Britain's Culture in Brazil, China and Italy

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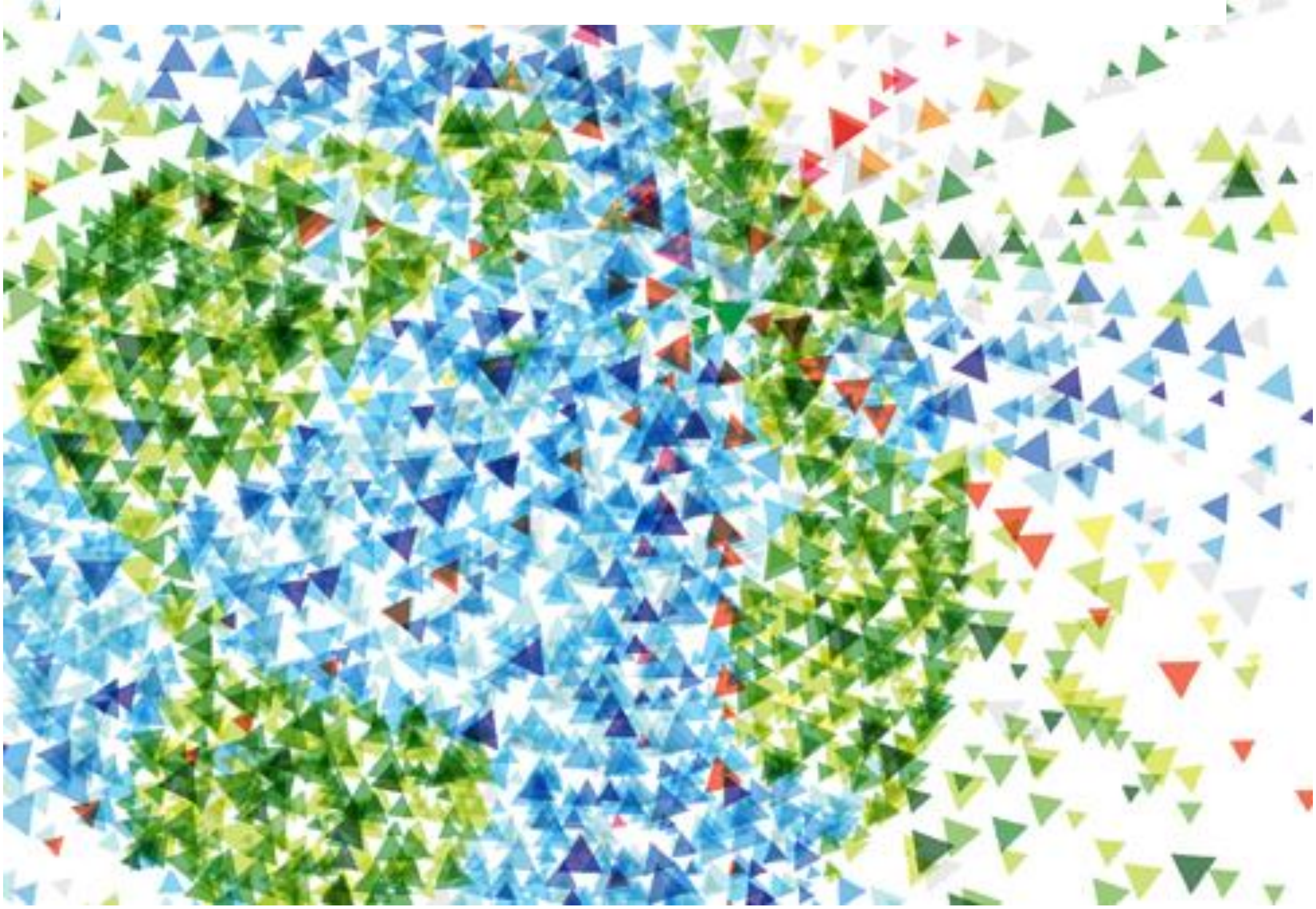


# Leveraging Britain's Culture

## Key findings

- Britain's culture is a key draw for international visitors, with both our contemporary culture and cultural heritage consistently ranked amongst the best in the world. Perceptions of Britain's culture (especially contemporary culture) are more favourable in China and Italy than in Brazil, correlating with awareness.

- Cultural activities are amongst the most popular elements of a British holiday, with 43% of holidaymakers visiting museums or galleries. Holiday visitors from Brazil and China are particularly likely to visit museums or galleries with 61% and 49% respectively doing so.

- Holidays centred on cultural heritage are very appealing across these three markets, with contemporary culture not quite such a strong pull. However, being able to relax and having a variety of things to see and do on holiday are even more important.

- Britain is seen as offering great cultural 'fabric' (i.e. museums, art galleries etc.) but is not as strong on 'living the feeling' (giving a sense of the emotions and atmosphere) which is a crucial element in attracting visitors.

- London's offer dominates understanding of Britain's culture, especially in Brazil and China. Knowledge and appeal of the rest of Britain are generally low, but there is interest and opportunity to build on this.

- Visitors are much more positive about Britain's everyday culture than those who have not been, with many delighting in the contrast of heritage and modernity.

- Using traditional icons and landmarks are key to attracting Chinese visitors, whilst Brazilians want to see a sense of fun and get a sense of the experiences they might have here. Italians are looking for something beyond the clichés, juxtaposing old and new.

Based on this research we have pulled together Ten Top Tips for successfully marketing Britain's culture to potential visitors from these three markets.

## Top Tips for marketing Britain's culture in Brazil, China and Italy

1. When promoting culture stories, experiences and atmosphere need to be included as well as the 'fabric' of culture such as museums.

2. Avoid sounding too 'worthy', serious or educational and focus on entertainment and fun.

3. In China images of Britain's key icons work well, here promoting Britain's biggest cultural assets will work but information needs to be clear, with no assumption of prior knowledge.

4. In Brazil and Italy more dynamism and emotion is needed. Juxtapositions of old and new work well. Italians want to see images of Britain beyond the established / well known.

5. Including people in images makes them more engaging.

6. Promoting a discount works better in China than advertising something as free – the latter can be decoded as busy and for the masses not the discerning.

7. Images of London are the most emotive in all markets, but classic Scotland can also work. There is opportunity to use myths and legends to tell a story about places outside London.

8. Alongside culture Britain's opportunities to relax, and the huge variety of things to see and do need to be promoted to maximise appeal.

9. Quotes, images and endorsements from previous visitors can work well. Visitors often find their expectations surpassed in terms of Britain's everyday culture, and enjoy the contrast of modernity and heritage.

10. Check which aspects of Britain's culture particularly resonate in each market, knowledge and awareness can vary widely. For example Shakespeare is more likely to be of interest in China whilst Sherlock Holmes is better known in Italy and Brazil.

# Introduction

## Importance of culture

Britain is recognised as a world class destination for culture. The GfK Anholt Nation Brands Index (NBI) consistently sees the UK ranked as one of the world's top five destinations for culture, reflecting the views of 20,000 people spread across twenty panel countries. In 2015 the UK was ranked third for contemporary culture and sixth for cultural heritage (out of 50 nations), as shown in Table 1.

### Table 1: GfK Anholt Nation Brands Index UK rank out of 50 nations 2008-2015

| UK rank out of 50 nations | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|
| TOURISM | 4 | 5 | 5 | 4 | 4 | 4 | 3 | 4 |
| Historic Buildings | 4 | 4 | 4 | 4 | 5 | 5 | 5 | 5 |
| Vibrant City | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| CULTURE | 3 | 4 | 6 | 4 | 4 | 4 | 5 | 5 |
| Contemporary | 4 | 4 | 4 | 4 | 3 | 3 | 3 | 3 |
| Sport | 7 | 8 | 8 | 5 | 6 | 5 | 4 | 4 |
| Cultural Heritage | 6 | 7 | 7 | 7 | 7 | 7 | 7 | 6 |

Participants in the NBI study are representative of the online population of the panel country – they have not necessarily visited the UK. Read more about NBI and Britain's image overseas.

Cultural activities are also amongst the most popular with Britain's visitors. Over two in five holiday visits (43%) include going to a museum or art gallery (see activity data collected for VisitBritain by the International Passenger Survey).

## Previous research

In 2014 VisitBritain commissioned research to explore the role culture (and heritage) plays in destination choice, what Britain's strengths are and how to communicate our offer to potential visitors. This study focussed on the top three inbound UK markets – France, Germany and the USA.

It found that culture and heritage were indeed important elements, but alongside the desire to relax and having lots to see and do. Whilst Britain was thought to perform well on tangible, rational cultural deliverables, and the depth and breadth of our culture being appreciated across all markets, Britain was found to perform less well at communicating the promise of an emotive and immersive experience compared to competitor destinations.

Many of these findings are mirrored in the study discussed in this report, emphasising the importance of considering these factors when promoting Britain's culture overseas.

# What is culture?

## Defining culture

There is no agreed definition of 'culture' within the tourism industry, and it can often be difficult to separate culture from 'heritage' in the mind of the consumer as they are inherently linked. Part of this research was to explore how culture is defined in these markets, but it covered both:

- Cultural heritage (e.g. Shakespeare, museums, pubs, sports, royalty, diversity) – we wished to understand the extent to which different elements did or did not resonate and appeal in these markets

- Contemporary culture (e.g. modern art, theatre, music) - previous research shows that some aspects of contemporary culture appeals more to particular age groups and nationalities. We know British music, films and literature are recognised around the world, but wished to explore to what extent these inspire visits, and which particularly appeal or are well-known in these markets.

## Mind, heart and body

Analysis of the views of research participants led to the development of a three part model of how both visitors and considerers of Britain understand culture.

1. Mind – 'Stories of a Place' – how a destination explains or presents itself. *97% agreed that understanding the stories behind a destination's culture makes a trip more enjoyable.*

2. Heart – 'Living the feeling' – experiences and emotions. *96% liked holidays where they can absorb the culture (doing what locals do, eating local food, soaking up the atmosphere).*

3. Body – 'The Fabric' – the physical manifestations of culture (e.g. museums). *93% like to see lots of sights / attractions and plan time to do so.*

Whilst 'the Fabric' is integral to a destination's cultural offering it is rarely the key motive to visit for those in Brazil or Italy who can feel this is a little 'cold' or 'worthy'. However, for many Chinese famous sights do remain the drivers.

> *I want to go to Europe to see the old buildings. The gold style, the churches, the Renaissance.*

***Chinese, Older Considerer***

## Appeal of different elements of culture

### What types of cultural holiday appeal?

Holidays focussed on historical culture were appealing across the board, the second or third choice for each market out of the twelve options presented, as shown in Table 2. Here Britain faces competition from other destinations more likely to be thought of as having rich cultural heritage, but it still places Britain in a strong position as a desirable destination for people in these markets.

Holidays based around contemporary culture held a little less appeal and were fifth or sixth choice in each market with a notably smaller proportion indicating it would appeal. This is the aspect of culture Britain is most strongly perceived as offering (especially in Italy and China) but this indicates it may be a slightly harder 'sell' and not quite at the top of potential visitors' wish list.

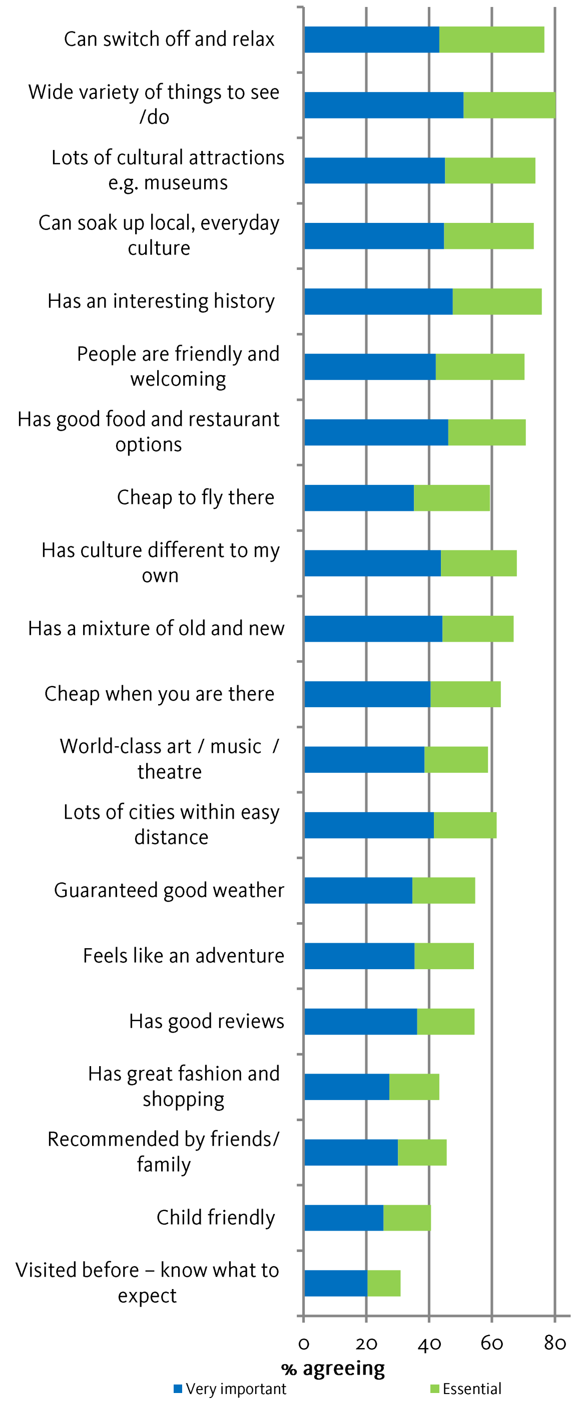
### Table 2: Holiday types that appeal to each market

| Holiday type | Brazil | China | Italy |
|---|---|---|---|
| Exploring one country | 62% | 67% | 63% |
| Historical culture | 63% | 65% | 59% |
| Multiple countries | 70% | 63% | 43% |
| Lakes and mountains | 50% | 67% | 39% |
| City break | 41% | 44% | 58% |
| Contemporary culture | 49% | 38% | 35% |
| Themed e.g. festivals | 41% | 36% | 34% |
| Shopping | 34% | 37% | 9% |
| Camping or touring | 22% | 25% | 23% |
| Hobbies/passions | 27% | 26% | 15% |
| Watching sports | 28% | 23% | 16% |
| Participating in sports | 22% | 20% | 10% |

The study also explored the relative importance of a range of factors in deciding on a holiday destination. Respondents were asked whether each aspect was essential, important or not important, as shown in Chart 1. Data for those who indicated it was 'not important at all', 'not very important' or 'neither important nor unimportant' is not displayed.

The elements most likely to be essential influences on choice were the ability to switch off and relax and having a wide variety of things to see and do (each essential or very important for over three quarters). These elements clearly need to also be promoted alongside a destination's cultural offering to maximise appeal.

### Chart 1: Importance of influences on destination decision making



Cultural attractions and being able to absorb the local, everyday culture are also key influences on destination choice. Just less than three quarters of respondents said these would be essential or very important influences. Reflecting the previous point about variety, it is important to consider that it is not only the 'fabric' of the cultural offering in terms of museums, art galleries and other attractions which draw visitors, but also the ability to soak up the local atmosphere and see day to day life.

## Awareness and perceptions of Britain's offer

### Knowledge and destinations

Amongst those who have not previously visited, but are likely to consider visiting Britain, knowledge is very limited. Three quarters of Brazilian considerers said they only knew 'a little' about Britain as a holiday destination, with a further 10% saying they did not know anything. Similarly, in China the majority knew either only 'a little' (51%) or nothing (11%). In Italy, closer geographically and culturally, knowledge was a little higher with the majority of considerers indicating they felt very or fairly knowledgeable although a substantial minority still said they only knew a little (38%) or nothing (6%).

Visitors in all three markets were of course more likely to feel knowledgeable than those who were only considering visiting but amongst Brazilian visitors it is notable that over a quarter (27%) still only felt they knew a little or nothing about Britain as a holiday destination. This may well be a reflection of the typical Brazilian visit being London dominated and not involving seeing the rest of Britain.

London dominates understanding of Britain's holiday offer, with 70% of visitors and considerers across the three markets (25% and 28%) likely to visit Liverpool, Oxford, Cambridge, Manchester or Edinburgh and fewer than 20% likely to visit other British cities, as shown in Chart 2. Indeed less than two thirds of respondents were 'aware' of any location outside London.

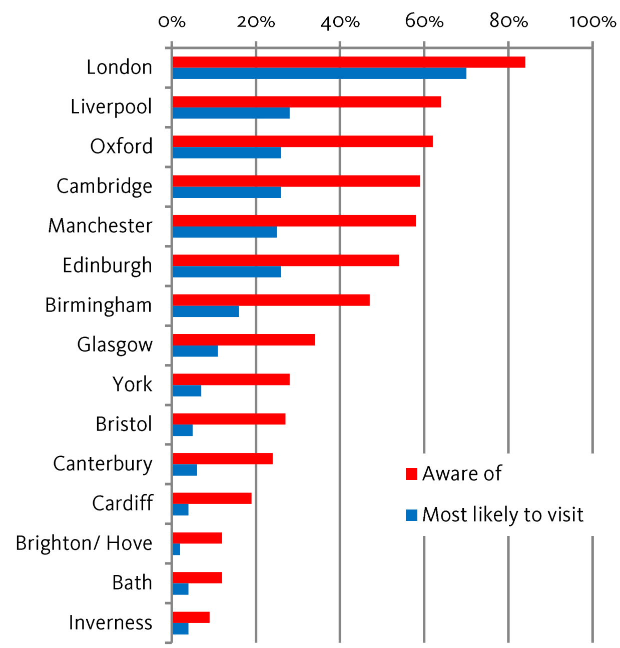
The qualitative research also found that London dominates understanding of 'Cultural Britain', both in terms of the 'fabric' of culture (e.g. London's museums and galleries) and 'living the feeling' (i.e. the sense of London's atmosphere, the experiences and emotions to be found there).

*In terms of culture I want to see…the mismatch between the formal and multi-cultural… it's all in London.*

**Italian, Younger Considerer**

This London-focus provides a strong 'hook' as a gateway to the rest of Britain (across visitors and considerers 57% of Italians, 68% of Brazilians and 72% of Chinese thought London one of the most important cities in the world). Positivity about London's cultural offering is apparent amongst both Brazilian and Chinese respondents with it more likely to be identified as a 'cultural hub' than with negative associations such as being crowded or expensive.

### Chart 2: Awareness and consideration of British destinations




Scotland was the most likely alternative to be identified as having cultural appeal.

*I always wanted to go to Scotland because of the film Braveheart. It was really interesting culturally… the guys with kilts, the castles and the people are very different.*

**Italian, Older Visitor**

*The plane comes into London and it's got everything there. Oh yes, Scotland of course, the castle and whisky, but anywhere else?*

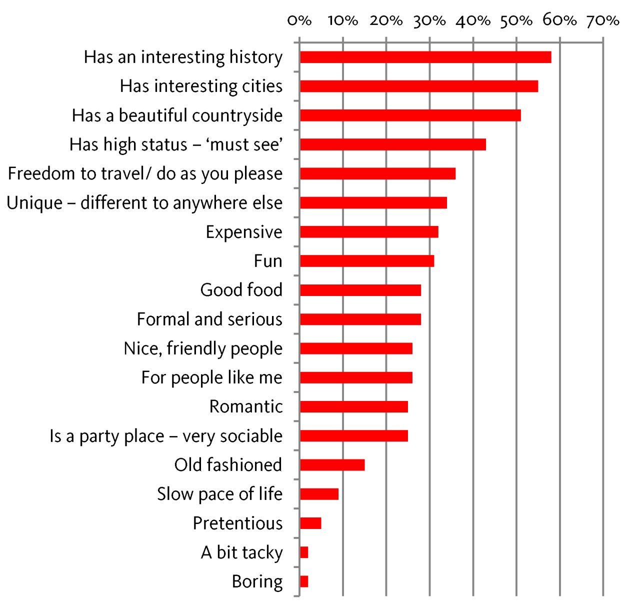
**Brazilian, Younger Considerer**

There was awareness of Liverpool, with its Beatles connections and Manchester's football culture. Elsewhere in Britain Oxbridge, York, Bath and Stonehenge were mentioned by minorities.

## Understanding of Britain's cultural offer

As outlined above perceptions of Britain are driven by its 'fabric' (i.e. the physical culture such as museums), whilst dimensions which link with 'living the feeling' (the experiences, emotions and atmosphere) are lower down the list. This is clearly illustrated in Chart 3 which shows that, of the factors listed, Britain is most likely to be associated with having an interesting history (58%) and cities (55%) but for example only 28% associate Britain with 'good food' and 26% with having 'nice, friendly people'.

### Chart 3: Associations with Britain



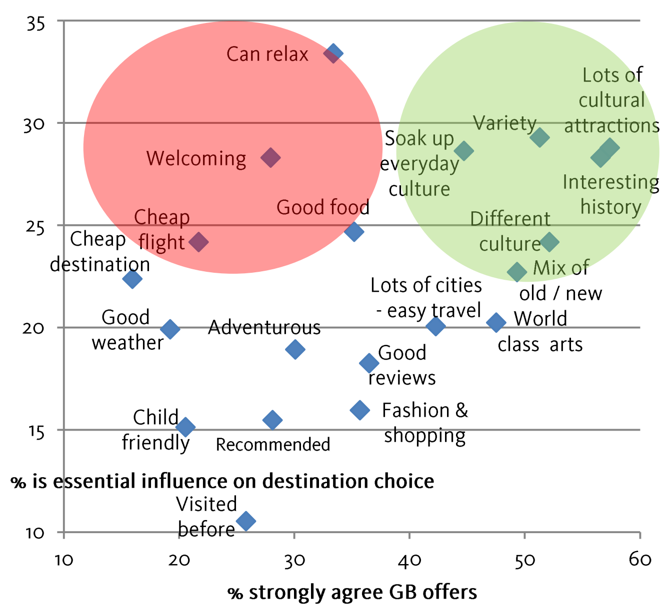

Compared to competitor destinations of the USA and France tested in this study Britain is less likely to be associated with factors relating to experiences and atmosphere than France (for example 67% associate France with romance compared to 25% for Britain, and 50% associate France with good food compared to 28% for Britain).

The USA is far more likely to be thought of as fun (50% do so compared to only 31% for the UK), whilst Britain is around four times as likely to be thought of as formal & serious than either France or the USA (28% compared to 8% and 7% respectively).

## Mapping perceptions of Britain's offer against influences on destination choice

Positively for Britain, many visitors and considerers strongly agree that Britain offers a number of aspects which are essential in their choice of destination, those highlighted in the green circle on Chart 4. They include having lots of cultural attractions, a variety of things to see and do, an interesting history, a mixture of old and new as well as the ability for visitors to soak up everyday culture which is different to their own.

### Chart 4: Extent to which Britain offers factors essential in destination choice




However, Britain is less likely to be thought of as offering a number of aspects which are also key to destination choice, those highlighted in the red circle on Chart 4. To maximise appeal Britain needs to tell potential visitors about opportunities to relax, reassure them they will be welcomed, and promote our range of great food. Value for money also needs to be a key message.

Some factors Britain is associated with are not necessarily the most important influences on destination choice for the majority, although they will still be key for specific groups. For example, factors such as shopping need to be marketed alongside the wider offer to appeal to a broader base.

## In-depth views on Britain's culture

The qualitative research enriches these findings, showing that Britain's culture is potentially a very rich draw, but that there are issues with knowledge and distinction.

- Positively, across all three markets Britain was felt to have a strong and unique culture. Visitors especially are enthusiastic endorsers of Britain's culture, whilst considerers show interest.

*It is not true they are cold…you go to a pub and they welcome you as one of their own. I went with a critical mind and was so surprised.*

**Italian, Older Visitor**

- Britain's diversity is recognised, with this seen as providing great richness. This is apparent across Britain's historical and modern offerings and in the range of things to see and do.

*It's the contrast between old and new, which I think is so interesting, that's what makes Britain so unique.*

**Brazilian, Older Visitor**

- However, understanding and awareness (especially in China and Brazil) can be limited beyond the most obvious, and can be London centric. In these markets there is also evidence of a lack of distinction or connection with no particular importance attached to Britain's culture compared to competitor destinations.

*I'd go and see Buckingham Palace and have afternoon tea . . . but I don't really know what there is beyond that.*

**Chinese, Younger Considerer**

- Britain's culture can be thought to be too serious, or 'worthy' and lacking in fun. It's therefore key to promote experiences and emotions as well as the sights themselves.

*The British are very serious, very formal and a little cold. I want to go and see it but I'm not sure how much fun it would be. They have a very different culture to ours.*

**Italian, Older Considerer**

This lack of connection with Britain's more vibrant side is certainly apparent amongst considerers. When asked about the experiences they might have in Britain afternoon tea and pubs were the most often mentioned, but the atmosphere was thought to be formal, polite or even cold.

However, those who have actually visited have a different perspective. They tended to have had more fun than they expected, and talked about Britain's entertainment, nightlife, vibrant city life, multiculturalism and the contrast of modernity and heritage.

*It's really different to anywhere else. You have this really ordered, sober, serious, organised backdrop…yet anything goes…they are so free, modern…not like us… it's not what you imagine.*

**Italian, Younger visitor**

## Favourite elements of Britain's culture

The traditions around the Royal family piqued the interest levels amongst those in China. While in Italy and Brazil London's transport infrastructure of the tube and red double decker buses attracted high levels of interest – both ranking the tube first and buses in the top four. In these two markets pubs, with perhaps the promise of an immersive experience and chance to 'do what the locals do', ranked third and fourth respectively. In Italy there is perhaps evidence of the mystique around British culture in the form of myths and legends generating high levels of interest (ranked in second). See Table 3 on the following page.

British food in general was more likely to be of interest to Chinese visitors and considerers (who placed it third) than to those in Italy or Brazil. Keeping on the food theme afternoon tea and cakes ranked in the top ten across all markets in this study – as high as fifth amongst Italian respondents.

Literary connections in the form of Shakespeare and Sherlock Holmes were particularly likely to be of interest. Behind these two, Harry Potter was ranked the highest in China (ranked sixth) while in Brazil and Italy it was Agatha Christie making up the top three literary factors (12th and 14th place respectively).

The Beatles were particularly likely to be of interest amongst Brazilians, ranked third, and were also appealing to Italians (ranked sixth) but much less so amongst Chinese respondents who placed them 13th. The Edinburgh Festival was of more interest to Chinese respondents; this was placed eighth.

British fashion labels were of highest appeal amongst those from China (seventh), while High Street shopping gained favour amongst those from Italy, who ranked this in ninth.

## Table 3: Interest in aspects of British culture (rank out of 25)

| | Italy | Brazil | China |
|---|---|---|---|
| The London Underground (the tube) | 1 | 1 | 5 |
| Monarchy / the Royals | 11 | 6 | 1 |
| Food | 7 | 5 | 3 |
| Shakespeare | 8 | 8 | 2 |
| Pubs | 3 | 4 | 12 |
| Red double decker bus | 4 | 2 | 15 |
| Beatles | 6 | 3 | 13 |
| Sherlock Holmes | 10 | 7 | 4 |
| Myths and Legends | 2 | 9 | 19 |
| Afternoon tea / cakes | 5 | 10 | 9 |
| Harry Potter | 15 | 14 | 6 |
| British fashion labels e.g. Burberry, | 16 | 15 | 7 |
| Cheap high street shopping e.g. Primark | 9 | 13 | 18 |
| Edinburgh Festival | 17 | 17 | 8 |
| Music Festivals | 20 | 11 | 14 |
| Agatha Christie | 14 | 12 | 17 |
| Downton Abbey | 12 | 16 | 10 |
| Bagpipes | 13 | 22 | 11 |
| Football | 18 | 18 | 16 |
| Opera / Ballet | 22 | 19 | 21 |
| West End Theatre / Musicals | 24 | 20 | 22 |
| Paddington Bear | 19 | 24 | 23 |
| Dickens | 21 | 23 | 20 |
| Black cabs | 23 | 21 | 24 |
| Cricket | 25 | 25 | 25 |

Turning to the relative appeal of different types of attractions, visitors from all three markets were most likely to say they would visit Britain's historical landmarks and castles if they came to Britain (out of a list of 19, shown in Table 4). Cathedrals and churches were also very popular choices in Italy and China (ranked third and fourth respectively). Museums are also consistently high on the wish list, fifth place amongst Italian and Brazilian respondents and sixth place for Chinese. The draw of these physical elements of Britain's cultural heritage is clearly dominant across all three markets.

Amongst Chinese visitors and considerers the interest in Britain's cultural heritage is dominant, with royal connections, historical / classical art galleries and stately homes also included in the top ten. Indeed, visiting street fairs / arts and crafts markets is the only activity not directly related to cultural heritage which makes the top ten amongst Chinese visitors and considerers. Visiting world famous universities or schools is the activity which Chinese respondents thought would be third most likely a part of their visit to Britain, reflecting the high number of Chinese students in Britain and knowledge of British educational establishments.

For Brazilians and Italians, ways in which they could access Britain's cultural life, such as going to interesting or diverse neighbourhoods, street fairs or craft markets, or restaurants serving local cuisine were interspersed in the top ten with the more traditional attractions.

## Table 4: Likelihood of visiting different attractions if visited Britain (rank out of 19)

| | Italy | Brazil | China |
|---|---|---|---|
| Historical landmarks e.g. Beg Ben etc | 1 | 1 | 1 |
| Castles | 2 | 2 | 2 |
| Cathedrals/ churches | 3 | 7 | 4 |
| Interesting and/ diverse neighbourhoods | 4 | 3 | 12 |
| Museums | 5 | 5 | 6 |
| Street fairs/ arts and crafts markets | 7 | 6 | 8 |
| Restaurants serving the local cuisine | 9 | 4 | 10 |
| Award-winning or interesting architecture | 6 | 10 | 11 |
| Royalty – residences and royal ceremonies | 10 | 8 | 5 |
| Historical/ Classical art galleries | 11 | 9 | 7 |
| Stately homes/ country houses & mansions | 13 | 11 | 9 |
| Food markets | 8 | 12 | 14 |
| Contemporary/modern art galleries | 12 | 13 | 13 |
| World-famous universities and/or schools | 17 | 17 | 3 |
| Locations from famous films/ TV | 14 | 15 | 16 |
| Award-winning restaurants | 18 | 14 | 15 |
| Live music shows | 15 | 16 | 17 |
| Live theatre | 16 | 18 | 18 |
| Sports matches and/ or venues | 19 | 19 | 19 |

### Experiences of culture across Britain

Understanding the types of activities actual holiday visitors from these markets undertake whilst in Britain sheds further light on the importance of Britain's culture. Holiday visitors from Brazil and China are more likely to include museums or galleries in their trip than those from many other markets with 61% and 49% respectively doing so, compared to the average of 43% across all holiday visits. Holiday visitors from Brazil are also particularly likely to have been to the theatre / musical / opera / ballet, with 20% doing so compared to an overall average of 14%. These figures are from VisitBritain sponsored questions on the International Passenger Survey.

To some extent the types of activities undertaken reflect where in Britain holidaymakers go. Outdoor activities such as walking in the countryside are particularly likely to be part of a holiday to the South West and Scotland.

Cultural activities such as museums and art galleries are most likely to be included in London although live music and festivals are especially popular for holidays in the North West and visiting film and literary locations is most often part of a visit to Yorkshire. [Read more about activities undertaken in different regions.]

The study therefore explored awareness and appeal of Britain's cultural offer around the country, looking at what can draw visitors outside the capital for more cultural activities.

## Culture and the study markets

This report focusses on a study by research agency Olive Insight, 'How Britain Can Best Play the Culture Card', commissioned by VisitBritain in early 2015. It covers two key emerging markets – Brazil and China - and also an established market, Italy, focussing on holiday visitors rather than those in Britain for business, study or to visit friends / relatives. Here we profile holiday visitors from these markets.

### Profile of visits

Italy is a large, established source market for holiday visits to Britain. In 2014 Italy was Britain's fifth most valuable market for holiday visits, with visitors spending £434 million, and the fourth largest holiday market for Britain with 890,000 visits, as shown in Table 5. Knowing what works and what doesn't work for these visitors is important to maintain Britain's share of visits and encourage return visits in future years.

Brazil and China are smaller markets, but show impressive growth. Both are within Britain's top twenty markets for value of holiday visits, with Brazil the sixteenth most valuable and the sixteenth largest holiday source market. China is Britain's eighteenth most valuable market for holiday spend and comes twenty-fifth in terms of volume of holiday visits (Chinese visitors spend above average).

Holiday visits from China in 2014 were almost four times the level seen ten years ago with holiday visits from Brazil almost six times higher. Potential for further growth from both markets is significant, but there is also stiff competition from European neighbours and other destinations around the world. Understanding how Britain can maximise appeal and attract more visits from these markets is vital.

### Table 5: Holiday visits to the UK from Brazil, China and Italy, 2014

| | Visits (000) | Growth in visits since 2004 | Spend (£ million) |
|---|---|---|---|
| Brazil | 209 | 497% | £159 |
| China | 86 | 295% | £138 |
| Italy | 890 | 77% | £434 |
| **ALL MARKETS** | **13,578** | **46%** | **£8,740** |
| Proportion from these three markets | 9% | n/a | 8% |

### Perceptions of Britain's culture

Looking at 2015 NBI data for the specific markets included in this study, as shown in Table 6:

- Chinese respondents are largely very favourable towards Britain's cultural offering, ranking the UK fourth for historic buildings.
- In Brazil Britain is notably less competitive, and is ranked ninth for cultural heritage and seven other competitor destinations were ranked ahead of Britain with regards historic buildings and vibrant city life.
- Italians are fairly positive about Britain's cultural offer, especially in terms of contemporary culture and vibrant city life for which Britain is placed third.

### Table 6: UK rankings out of 50 major destinations from specific markets, 2015

| | UK NBI 2015 | Brazil | China | Italy |
|---|---|---|---|---|
| Rich in historic buildings and monuments | 5 | 8 | 4 | 6 |
| Has a vibrant city life and urban attractions | 4 | 8 | 3 | 3 |
| Interesting / exciting place for contemporary culture | 3 | 6 | 3 | 3 |
| Has a rich cultural heritage | 6 | 9 | 3 | 5 |

These NBI findings have been relatively stable over the seven years the study has been conducted, indicating their reliability.

## Study methodology and participant profile

### Study details

VisitBritain commissioned Olive Insight to undertake research in Brazil, China and Italy to understand the extent to which Britain's culture is a draw and the best way to lever it to encourage visits across Britain.

The research was in two stages

1. 12 qualitative focus groups, four each in Sao Paulo, Shanghai and Rome.
2. 608 online quantitative interviews, 200 per market

Research was conducted amongst both 'visitors' (those who had recently visited Britain for a holiday) and 'considerers' (those who were open to visiting Britain and financially able to do so). Two focus groups were conducted in each market with each group, and the quantitative interviews were also evenly split between visitors and considerers.

All respondents were decision makers in the holiday process for their family, had travelled outside their own country for leisure in the last five years (Brazilian and Chinese respondents had travelled medium to long haul previously) and held passports. This ensured the considerers were realistically likely to be able to visit Britain.

To produce views representative of each market respondents were mixed in terms of age and gender (for the quantitative element respondent profile was matched to the national profile for each market in terms of age, gender and region of residence). British ex-pats living in these markets were excluded from the research as their views and motivations would be atypical.

### Profile of research participants

Italian participants were older and less affluent whilst Brazilians and especially Chinese were younger with higher disposable income. This reflects the profile of international travellers in these markets – it is a mass market activity in Italy but remains that of a more limited group in China and Brazil.

Three different psyches were found across the markets. Whilst for travellers in Italy status came from knowledge and experience in Brazil this needed to be demonstrable – photos and stories are key. In China a desire for more ostentatious displays of status was a driver. As explored below, these approaches are reflected in the ways those from each market want to access culture.

*I went to the Louvre, but I didn't go in. I just got the selfie outside!*

***Brazilian, Older Considerer***

## Further information and research

Find further research on culture here including links to the research outlined above looking the appeal of culture and heritage in Britain's three largest markets - France, Germany and the USA

VisitBritain makes International Passenger Survey (IPS) data from the Office of National Statistics available to download from our website. As part of the IPS we have collected further information on the activities visitors have done while in the UK for a number of years. Activity data is available for download where you can view visits, nights and spend by purpose of visit, country of residence, age, gender and duration of stay.

And finally, our flagship Market Profile reports for over 20 markets including Brazil, China and Italy include in-depth coverage of each market and incorporate all of our latest data and insights.

Also find out more about leveraging culture and heritage in Britain's three largest inbound markets (France, Germany and the USA) via a dedicated report

## Data Sources

| Source | Charts/Tables |
|---|---|
| GfK Anholt Nations Brand Index, July 2015 | **Table 1 and 6** |
| Office for National Statistics, International Passenger Survey, 2014 (unless otherwise stated) | **Table 5** |
| Olive Insight, "How Britain Can Best Play the Culture Card" (commissioned by VisitBritain), 2015 | **All other tables and charts** |

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