Executive Summary

1. Setting the Scene
   • Introduction
   • Value to the Visitor Economy
   • Importance to Tourism
   • Impact on Consumer Trends
   • City Tourism
   • Culture as a Motivator to Visit

2. Built Heritage
   • Built Heritage Summary
   • Nations’ Ratings of Britain’s Built Heritage
   • World Heritage Sites Case Study
   • How Built Heritage is Viewed
   • Famous Buildings and Monuments
   • Castles and Stately Homes
   • Churches and Cathedrals
   • Attractions
   • Interesting Cities and Towns
   • Britain’s Iconic Sights
   • VisitBritain’s Brazil Campaign Case Study

3. Cultural Heritage
   • Cultural Heritage Summary
   • Impact on Cultural Heritage
   • How Cultural Heritage is Viewed
   • Museums and Galleries
   • Art Galleries
   • Performing Arts
   • Gardens

4. Contemporary Culture
   • Contemporary Cultural Summary
   • How Contemporary Cultural is Viewed
   • Impact on Contemporary Culture
   • Music
   • Musical
   • Nightclubs and Bars
   • Bollywood Feature
   • Films and TV Locations
   • Fashion Week Feature
   • Design and Fashion
   • Festivals
   • Modern British Food
   • Cosmpolitan Britain

Appendices
   • Useul contacts and Information Sources used to compile the report
   • Value of Culture and Heritage to the Visitor Economy
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 £6.5bn 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, 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 naïve 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 “cosmopolitanness” 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.
Setting the Scene

Introduction

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 visitor’s 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. This could range from the full blown history buff determined to soak up quantities of Britain’s legendary past or simply to a visitor walking down London’s South Bank absorbing the surrounding iconic buildings and taking in the broad range contemporary culture as they meander by.

Similarly its importance can be seen in the proportion that it contributes to the tourism economy. For the purposes of this report this calculation is based on several assumptions which are discussed later in the report. 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.

It could be said that people have always travelled to meet different people and to discover new ways of doing things. Clearly, travel has evolved so much more than this, but some fundamental things still remain today - travellers are still looking for distinctive experiences that are different from their everyday lives and want to experience things from a local point of view.

Britain’s past has meant many countries worldwide have had a taste of Britain to some degree. The British Empire and colonisation has meant that many nations have been introduced to Britain and to British culture. We only need to look at many of the monuments in Mumbai to see the stark similarities to London’s monuments. Additionally other countries see British history as part of their own. “We base our whole culture on England. It’s where our history came from. Their history is longstanding.” (US East Coast)

Again the prominence of Britain and British celebrities in the world media has meant that many nations are familiar with some essence of British culture or Britain. The cultural tourism market is becoming increasingly competitive as other destinations jump on the cultural tourism bandwagon. Some of these destinations, especially some of the newer destinations to tourism, are able to offer different things to travellers and therefore are appealing to different consumer needs. As more and more destinations jump on the bandwagon the face of cultural tourism is changing. These “newer” destinations are able to offer distinctive cultural experiences that are seen to be unique and exciting to travellers and offer so much more than the traditional heritage sites.

Therefore in order for Britain to remain competitive it is vital that the different facets of cultural tourism are understood, as well as its impact on traveller motivation and subsequent behaviour.

So What is 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”.

In its study of City Tourism and Culture within Europe, the European Travel Commission (ETC) suggests that cultural tourism in an international context is “A movement of persons to specific cultural attractions, such as, heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence”.

ATLAS (Association for Leisure and Tourism Education) defines it as “the movement of persons to cultural attractions (such as heritage sites, artistic and cultural manifestations, arts and drama) in cities in other countries than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs.”

The definition of the word “culture” also complicates things. It not only encompasses traditional culture such as visiting museums, music and theatre performances, galleries, cultural heritage etc, but also the way of life in a certain area including aspects of language, beliefs, cuisine, dress, customs etc and the products that arise from it (eg architecture, atmosphere). Cities tend to offer all three elements to the visitor:

- Heritage = artefacts relating to the past
- The Arts = contemporary performing and visual arts
- Creative = the creative industries

So what is Heritage Tourism?

Zepple and Hall 1992 describe it “as an encounter with or an experience of being part of the history of a place through visiting historic sites, monuments, and landscapes. It focuses on learning and includes the experience of local traditions, social customs, religious practices and cultural celebrations. Historical tourism is a form of heritage tourism: its main focus is to stress the experiences of the past”.

Additionally, it can be difficult to separate Culture and Heritage in the mind of the consumer because they are inherently linked. Culture is an association with the human world including art, ideas and rituals as well as monuments, architecture and history whereas Heritage is more about the past.

As we have determined cultural and heritage tourism is difficult to define as it encompasses so many different elements of a destination. 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 the legacy of Shakespeare and his literature), Built or Historical Heritage (eg Tower of London) and Contemporary Culture (eg modern art, theatre). Although it can be hard to pull these apart within a destination for the purposes of this report we have grouped culture and heritage tourism in the following way: Built heritage, Cultural Heritage and Contemporary Culture and together these form a large chunk of the foundation of why visitors come to Britain.

So going forward, in order for Britain to survive as a must 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.
Value to the Visitor 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.

This estimate represents the total amount spent in Britain by visitors who have been drawn to the country by the Culture and Heritage that is on offer, and is not an estimate of how much is spent directly on Culture and Heritage ‘products’, for example theatre tickets or entrance to a stately home. All manner of tourism businesses from accommodation providers, restaurants and retailers benefit courtesy of visitor spending that ultimately would have gone elsewhere were it not for Britain’s Culture and Heritage.

These figures demonstrate clearly both the value of Britain’s Culture and Heritage in attracting visitors from overseas to our international tourism competitiveness and to the wider economic health of Britain, but additionally help to signal the presence of a virtuous circle. Spending by inbound visitors attracted to Britain by Culture and Heritage helps to sustain the vibrancy and upkeep of these products for future visitors.

Looking at what inbound visitors purchase during a trip to Britain it is likely that tourism directly supports Culture and Heritage to the tune of more than £500m per annum once we take into account not just admission fees/tickets but additionally tertiary spend on sundries such as souvenirs, food and drink purchased during time spent at a Cultural or Heritage event or attraction.

Details of how we have made these estimates can be found in an Annex to this report.
Importance to Tourism

Culture and Heritage are Key Motivators for Holidays
VisitBritain sponsored a question on the Nation Brands Index (NBI 2009) to understand more about people’s attitudes towards holidays.

Approximately 10,000 online respondents were asked: “We would like to ask you about your attitudes and opinions related to holidays. For each statement please give your opinion on a scale of 1 to 7, where 1 is STRONGLY DISAGREE and 7 is STRONGLY AGREE. Their answers are shown below.

57% 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. So how can Britain take advantage of this?

It is apparent from the chart that potential visitors are keen on seeing famous and well-known locations (62% agree), but also on exploring new places away from the crowds (66%), so Britain needs to present a versatile mix to potential visitors. The Chinese, for example, are particularly keen on seeing famous locations (72% agree) on their travels, so it is important to include iconic imagery such as Big Ben in marketing materials to reassure them that they are not going to miss out on the ‘must-see’ attractions. Other (more mature) markets such as Australia want to get beneath the surface of destinations a bit more, getting away from the crowds (71% agree), so highlighting authentic cultural experiences (eg pubs) and ‘hidden gems’ (whilst maintaining an element of the ‘must-see’ attractions) is important.

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.
Importance to Tourism (continued)

Britain is considered a world-class destination for Culture and Heritage

Each year, a worldwide online panel of 20,000 consumers is polled on their perceptions of the cultural, political, commercial and human assets, investment potential, and tourist appeal of a number of developed and developing countries. This provides a clear index of national brand power, a unique barometer of global opinion. The ‘hexagon’ chart below shows how the UK is ranked as a Nation Brand compared to 49 other nations cross six dimensions.

Every year, the UK is consistently perceived to be one of the leading nation brands, and a large part of this is thanks to its world-class culture and heritage.

In terms of Culture, the UK is perceived to be the fourth best nation out of fifty (indicated by the proximity of the green point of the inner hexagon to the ‘Culture’ label). 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).

In summary, these findings from the Nation Brands Index (NBI) indicate (a) that Heritage and Culture are strong motivators to visit a destination (b) Britain is seen as a world-class destination in terms of its Culture and Heritage offering. Both these results come as no surprise in the context of numerous other research projects, which consistently show that Culture and Heritage are the main motivators for visiting Britain for a holiday/short break. The following section explores the relationship between Heritage, Culture and the aspiration to visit Britain in more detail.
Importance to Tourism (continued)

Built Heritage and Vibrant Cities provide the aspiration to visit Britain

On the ‘vertical-axis’, the following chart shows how various aspects of Britain’s image are ranked by potential visitors, relative to 49 other countries according to the Nation Brands Index (2009). As has already been discussed, it can be seen that Britain is ranked 4th in terms of its built heritage, 4th for its vibrant and exciting cities, 4th in terms of contemporary culture, and 7th as a nation with a rich cultural heritage.

The ‘horizontal-axis’ shows how strong the relationship is between these aspects of Britain’s image and how likely respondents say they would be to visit Britain if money were no object.

Looking towards the top-right of the chart, we can see that Britain is ranked highly as a nation rich in built heritage and with vibrant and exciting cities, and this works in Britain’s favour when attracting visitors. Britain is also ranked highly in terms of its contemporary culture and rich cultural heritage – these also help drive visits, but to a slightly lesser extent than its ‘built heritage’ and ‘vibrant cities’.

This might be explained by the fact that Britain’s built heritage has universal appeal, irrespective of nationality, age, or gender, whilst many aspects of Britain’s culture appeal more to some groups than others, as we’ll see throughout the course of this document.

Leveraging these tourism assets and targeting the right messages to the right audiences in marketing materials should therefore have the biggest impact in encouraging more visitors to come to Britain.

As a sidenote, it is also worth saying that how Britain’s natural scenic beauty is perceived also impacts strongly on aspiration to visit Britain. However, currently Britain is not seen as a world-leader in terms of its natural beauty....improving perceptions here would also encourage more visitors.
Heritage and Cultural Activities are the most appealing activities for potential visitors

Given that built heritage is a strong driver of visits to Britain, it comes as no surprise to see that built heritage activities (such as going to castles/stately homes, sightseeing monuments, and visiting churches/cathedrals) are seen as some of the most appealing activities that Britain offers. The chart below shows how highly respondents rated Britain as a place to do various activities (vertical axis) and how likely they claim they would be to participate if they were to visit Britain (horizontal axis).

Following castles/stately homes and sightseeing buildings/monuments, cultural activities such as going to museums, royal locations, and gardens, art galleries, and pubs hold a high level of appeal for potential visitors. 73% of respondents said they would be very likely to visit castles/stately homes and sightsee famous monuments/buildings on a trip to Britain. 65% claimed it was very likely they would go to museums, 63% churches/cathedrals, and 60% locations associated with the Monarchy and Royal family.

Following many of these ‘must-do’ activities, contemporary cultural activities such as shopping for fashion, going to bars/clubs, going to festivals, live music events, musicals, and football matches are appealing to many potential visitors, but not as consistently as the built heritage activities. Often these activities appeal more to particular groups (eg youth) rather than having all-round appeal).

Other activities such as visiting spas and beaches are not so much of a priority for potential visitors from overseas – these are not rated very highly by respondents and a relatively small percentage imagine themselves undertaking these activities if they were to visit Britain.

Each of the subsequent chapters (focussing on Built Heritage, Cultural Heritage, and Contemporary Culture) contains more information about each of the above Culture and Heritage-related activities, giving key insights into which activities are most appealing to different markets and demographic groups, together with information on who actually undertakes each one when they visit the UK.
What activities do visitors actually undertake?

As well as looking at the appeal of different activities to potential visitors, it is also important to consider which activities actual visitors to the UK undertake. The chart below shows the proportion of overseas visitors undertaking various activities in 2006 and 2007. The chart is based on responses to the International Passenger Survey (IPS).

It is immediately clear that many classic culture and heritage activities are amongst the most popular activities undertaken by visitors.

Shopping for clothes/accessories (45%) or for fashion, design, home, antiques (42%) stands out as being the most popular activity. This is closely followed by another easily accessible activity – going to the pub. 4 in 10 visitors went to a pub when they came to UK in 2007.

Visiting castles, churches, monuments or historic houses was an activity enjoyed by three out of every ten visitors in 2006, with nearly one-quarter of visitors going to parks/gardens, and to museums or art galleries.

Some sub-group differences

Unsurprisingly, those visiting for Holiday purposes usually take part in more activities than those coming to the UK for other reasons, especially classic culture and heritage activities such as visiting museums and art galleries (42% vs 23% overall), castles, churches, monuments and historic houses (55% vs 30% overall).

Only around a quarter of those who watched a sporting event were on holiday, with a further quarter doing so having a ‘miscellaneous’ journey purpose – and we can surmise that coming to see the event was probably the motivating factor for visiting Britain. The story was similar when looking at watching football matches specifically; 36% of viewers from overseas had a ‘miscellaneous’ journey purpose, 26% were on Holiday, and 27% were Visiting Friends and Relatives (VFR).

Visitors who come to Britain to see friends or relatives (VFR) definitely take part in culture and heritage pursuits, but with less intensity than Holiday visitors (going to the pub being the main exception, 48%). VFR visitors are slightly more likely than other visitors to say they ‘socialised with the locals’ (perhaps unsurprisingly, 50%), and walked in the countryside (28%).

Although only a small proportion for each activity, a minority of business visitors clearly do undertake culture and heritage activities during their stay, either fitting them in around their business commitments or extending their stay to take advantage of being in Britain. A quarter went to the pub, around 15% shopped, 8% visited built heritage (eg castles), and 6% went to museums/galleries during their stay in UK.

Further Research

The above findings on this page and the preceeding ones related to the importance of culture and heritage to Britain’s tourism offering are focussed on just two (albeit very large) surveys (the NBI and IPS). However, the power of Britain’s Culture and Heritage in attracting visitors has been demonstrated in all the relevant research that VisitBritain has conducted, in both established and emerging markets (Details of this research are illustrated throughout the remainder of this document). Britain’s offering of history and heritage combined with our unique blend of contemporary and historical culture are the key reasons people want to visit.

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.
In terms of Britain’s “cultural” product, we find in research that cultural sectors (e.g., museums) have higher proportions of overseas visitors (relative to domestic) than other sectors (e.g., zoos, gardens).

In 2007 VisitBritain carried out research amongst French, German, Italian, Spanish, Irish, and British respondents that had holidayed in Britain in the last 3 years to understand which aspects of their trip had most influence on their overall experience and likelihood to recommend Britain to friends and family. Visitors were most impressed with Britain’s interesting cities and towns, with heritage and culture seen to be Britain’s key strengths. The analysis also shows that other aspects such as the performing arts, churches and cultural events are not necessarily considered as important when choosing a holiday destination but do impact on visitors’ overall experience when actually there. So the research shows that by encouraging more visitors to do more of these sorts of activities, once they have actually decided to come to Britain will come as a pleasant surprise to many and improve their stay further.

The Cultural Tourist

At some point in a visitor’s trip they will touch on some aspects of Britain’s culture, whether it is the main reason for their trip or something they just stumble across. Additionally, for some culture is the prime reason for travel, while for others it is the décor (especially the cultural heritage) in which a visit takes place.

Culture visitors can be classified into the following categories:

- The purposeful cultural tourist / culture vulture - cultural tourism is the primary motive for visiting a destination and the tourist has a deep cultural experience.
- The sightseeing cultural tourist - cultural tourism is a primary reason for experiencing a destination, but the experience is less deep.
- The serendipitous cultural tourist - A tourist, who does not travel for cultural reasons but who, after participating, ends up having a deep cultural experience.
- The casual cultural tourist - cultural tourism is a weak motive for travel and the resulting experience is shallow.
- The incidental cultural tourist - the tourist does not travel for cultural reasons, but nonetheless participates in some activities and has shallow experiences.

Different mindsets underpin trips to Britain and visitors are often acting on a continuum of experience from the shallow (“doing the attractions”; “been there, done that”; “ticking off the list”) to the deeper. With the latter, there can be more profound interest in Britain and attractions eg the significance of attractions (learning about history; connecting with the past; firing the imagination). This is similar to findings in the ETC report “Cities & Culture” which found great differences in people’s “cultural” motives and the varying depth of the experiences.

In terms of culture as an actual motivator to visit it is the purposeful and sightseeing tourists that travel to learn about different cultures. They take a more profound interest in culture than just seeing the famous sights of a given destination. The traveller is interested in learning about and understanding a culture; is interested in discovering the peculiarities of a place and its people. These travellers are interested in cities, historical sites, the arts and all aspects of ‘high culture’. The holiday might be quite tiring – lots of walking around and looking at things – but it provides great personal enrichment. Britain offers great riches to them and not just in London.

“I like to learn about other people and their way of living.”
(Sweden)

“I like to see life as I don’t live it. The food, the feel, the people and learning about what makes some place so different.”
(US East Coast)
Importance to Tourism (continued)

Culture is a defining element, although it means different things to different travellers and for many culture equates with lifestyle – a desire to observe and experience the way that Europeans live.

Research conducted in Canada (2008) showed young Canadians in particular wanted to understand local culture and even to blend in / live like a local whereas older Canadian travellers were more likely to speak of exploring museums, galleries, music and the arts. There is a sense that they might be fairly mercenary in their approach, looking to get the most out of their trip, with a view to incorporating it into their lives back at home. However, in contrast many non-Westerners are less prone to wanting to look below the surface of Britain, to get to its hidden depths. They are more interested in saying they have been there and can be called “trophy tourists”.

This is largely because Western destinations are often seen to be aspirational as they have a strong popular culture and worldwide cultural icons such as celebrities, music etc. Qualitative research in China (September 2007), suggests that an element of “status anxiety” and peer group conformity has influenced and is spreading the travel bug that is sweeping China. Overseas travel has become a badge of sophistication.

“You feel out of the loop if you haven’t been to places they’ve been.”

“The further away, the higher the cost, the prouder you feel.”

“I’d like to show off to my friends that I’ve been to Britain, even if I was hungry later!”

Even when culture is not the primary motivator for travel, visits to cultural attractions are still an important part of the holiday experience. Historic towns and monuments feature as the most important attractions visited on holiday, closely followed by museums and exhibitions. Museums and cultural attractions also form a big part of the visit, along with iconic sightseeing of the “must-sees”. Walking around and soaking up the atmosphere is a big part of the experience. Some visitors were surprised at the multi-cultural nature of London life. It is difficult for major attractions to displease – most visitors accept what they get and find these a crucial part of the tourist experience. Experiences are generally positive. A few instances of disappointments included high prices, long queues, overcrowding, a lack of air-conditioning, and not being open long enough.

Musicals and theatre are an important part of the London experience for many – some enjoyed it so much they went back for more while in London. In terms of “living culture”, British pubs are a real strength – they are part of the image of Britain and a good experience to have during a visit. British countryside is an attractive proposition to many but the dream is to be on the inside of local culture and welcomed. However there is a fear is that you will be on the outside.
Cultural Tourism is one of the primary reasons why people travel to Britain. It therefore can be classified as the primary motivator of tourism to Britain. Motivation is essentially about learning but also encompasses other slightly less tangible aspects such as "soaking up of the atmosphere of a place". It is therefore important to understand the influences that motivation has on travel behaviour which in turn then creates travel trends.

Authenticity and Uniqueness
In consumers’ continued search for meaning in their lives, the trend for authenticity has been identified to refer to the search for something real, original or authentic. This can be in a product, a service or an experience, as well as looking for a sense of it within themselves. This has always been something the older generations and the more upmarket younger consumers have had a particular interest in, but it is now applying to a cross section of society and is likely to increase among the population of developed markets as accessibility to knowledge and information continues.

Many destinations already market their cultural tourism on the theme of authenticity, for example New Zealand ran a '100% Pure' campaign, utilising its Maori heritage. However, what was once a niche opportunity is now becoming mainstream as consumers are moving away from wanting a service to wanting an experience on the basis of how 'real' or how authentic it feels. Does this holiday allow them to experience the 'real' Britain or are they being offered a tourist experience that they may view as less authentic. A key consideration is that for the experience to feel authentic it also has to avoid high tourist density, so it is important that consumers are offered enough choice away from the mainstream activities and experiences to avoid these quickly becoming tourist hotspots in themselves.

VisitBritain’s extensive research into the emerging markets shows that a desire for ‘immersion into the culture of the country they are visiting’ is a key differentiator of those that are most likely to visit Britain in these markets versus those who are not. As tourists ‘develop an ever more critical attitude to the artificial, in favour of greater authenticity’ they in turn want more emotional satisfaction from their holidays. Linked to the need for authenticity is a sense of nostalgia, a longing for the ‘simplicity’ and ‘honesty’ of the past. Movements such as ‘Slow Food’ and ‘Slow Cities’ are a clear result of this desire.

Cultural Immersion
This follows onto the trend for cultural immersion. Research conducted by VisitBritain and other tourism bodies has shown that well travelled visitors appear to take a genuine interest in local culture and want to meet the people. Not only are visitors keen to explore the history, heritage and culture of the country but want to go beneath the surface and experience the local people and traditions. Visitors say that they want to return with experience, not just the photos! Telling stories around British history and historical sights is a good way to involve visitors and allows them to dig deeper into British heritage. Another way is to give visitors a good pub experience where they get to meet the locals and experience an age old tradition. Research also tells us that this “inclusion” is likely to make visitors feel more welcome in Britain and change perceptions that British people are not the stuffy, stiff-upper-lip sort.

Interestingly, not all countries are keen to get underneath the surface of Britain and meet locals. Qualitative research conducted in India (2006) showed that although Indians expressed a desire to visit Britain, there is no particular interest in talking to the British as part of the experience – for them it is more about seeing Britain than meeting the British. Responding to VisitBritain’s sponsored questions relating to holiday attitudes on the NBI survey (2009), Chinese respondents agreed more strongly with the statement, ‘When I’m on holiday I like to see famous and well-known locations’ than any other. 72% agreed with the statement, with 28% agreeing strongly. Just 11% agreed strongly that, ‘When I’m on holiday I like to explore new places away from the crowds’.

Experiential Holidays
In the future, people will have more and more diverse interests, and travel will develop to be more about the experience and participation. It will be the immersion and passion that counts above the destination itself. This is about having a desire not just to have things or buy things but to experience them.

VisitBritain’s research in Japan (2008) demonstrates this growing trend among travelers towards independent and experiential holidays rather than the ‘trophy tour’. The signalling of status has become more subtle and involves experiences and events not just ticking off famous cities and landmarks.
Impact of Consumer Trends (continued)

Travellers are increasingly looking for holiday options that give them a memorable and rewarding holiday experience. Consumers are looking for far more than just to see a world heritage site. They want to get involved in the site – live and breathe it. Therefore propositions from Britain marketers that offer good value experiential or self enrichment products are likely to win good business from consumers.

Collecting Experiences
As consumers have less time, they are demanding more from their leisure activities and there are an ever-increasing number of savvy travellers who want to collect ‘experiences’, not just tick a destination off the list. Travellers are becoming more discerning and confident about travel and so destinations need to have core elements that differentiate them from the competition. Britain needs to keep on growing its strong culture and heritage offering not only to diversify itself from competitors with a similar product offering but from also destinations offering new experiences appealing to consumer needs.

For example more and more travellers are becoming interested in the experiential side of Britain, such as pubs, concerts, and unique experiences such as punting in Cambridge.

Special Interest Travel and Self Improvement
Evidence is building for the existence of multiple markets for special interest / niche travel eg lifestyle holidays. These go hand in hand with global trends towards self-improvement and experiential travel which can be seen in many travel markets. Generally across many different sectors, things are becoming more personalised and specialised. For example, search engine entrepreneurs are experimenting with versions that are no longer general in scope but specific to categories, and devoted to subjects, and travel is one such key area.

These special interest “programmes” have a strong educational focus relating to special interest areas of art, history, architecture, gardening, walking, theatre or music. The tour participants are generally people in their fifties and over. They are leisure travellers who are seeking new experiences, learning with like-minded people and personal fulfilment through experiential travel. However it is not only the more mature travellers that group together. Singles also group together around shared interests and friendships (where word of mouth is king) – where an individual can belong to several ‘tribes’ across a diversity of interests. However, importantly, the difference about these new groups, is about an INDIVIDUAL in a group, not the GROUP.

Cultural Parenting
Amongst many of VisitBritain’s markets we are seeing the rise of “cultural parenting” or “education fever”. Education is very important and is seen as status symbol – this is especially true in many of the Asian markets. Travel is regarded as an educational experience and one that contributes to personal development.

Similarly, the latest Amex Luxury Survey found that affluent American parents are teaching their children to value philanthropy, cultural experiences and other personally enriching activities above material goods. Almost all parents said that they want their children to have experiences that ensure they are cultured and well rounded. As such, when affluent parents do spend significantly on their children, it is on cultural activities, such as international travel.

VisitBritain sponsored a question on the Nation Brands Index (2009) to understand how important holidays and other activities are regarded. The research findings show that taking foreign vacations is at least ‘quite important’ for 60% and ‘extremely important’ for 11% of online respondents from around the world. An indication perhaps of travel as a necessity in order to enrich life – an absolute must-do.

Growth of New Destinations
Asia is becoming a force to be reckoned with. Not only is it becoming a formidable economic powerhouse that is exerting considerable economic and sporting clout but it is becoming a very desirable travel destination. It is no longer seen as traditional gap year or backpacker destination but as a place where Western visitors can comfortably visit for a 2 week break.

Additionally, it is becoming “cool” for other Asian consumers to explore their own countries or continent ahead of making the big trip over to Europe or the US. Low cost airlines such as Air Asia which offers low cost flights around Asia but also long haul flights between Kuala Lumpur and London for about £180 return are also contributing to the growth of visitors to Asia. Asia has a wealth of long established histories with a plethora of different cultures which is inspiring both Asian and Western visitors to visit. This and better route and flight availability has therefore impacted on the number of people travelling to Asia rather than Europe and the US – which in turn has implications for British tourism.
City Tourism

Growth of City-based tourism
The budget airlines have provided a driving force for many short-trips and made travel to new cities far more accessible through new routes.

In 1993, 33% of visits to Britain lasted 1-3 nights and 27% lasted 4-7 nights. In 2008, 43% of visits lasted for 1-3 nights and 29% lasted for 4-7 nights. Clearly the proportion of trips in the 1-3 night category has grown to the greatest extent (an additional 7.5 million trips compared to 1993), with many of these being city-based trips. Between 1999 and 2008, visits to the UK have grown by 26%, but many of its most popular cities have shown even faster growth. Visits to Manchester have grown by 65%, Nottingham 61%, Birmingham 53%, Bristol 64%, Newcastle 36%, Cardiff 32%, and Liverpool by a hefty 163% (culminating in the year it was named European Capital of Culture).

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. There is also more than one type of “cultural tourist” and there are opportunities to address their motivations in different ways. For some, culture is a prime driver for travel whereas for others it is part of the backdrop for pursuing other activities eg sight-seeing, eating and drinking.

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 innovate or use events, exhibitions etc; to organise something new around something old means they are able to reinvent the wheel and present new cultural tourism products to consumers.

Visitors to London
Research looking at London visitors’ experiences showed that its Culture and Heritage are commonly regarded as highlights of the trip (Lynn Jones Research, 2007-2008). 6,500 visitors who had bought the ‘London Pass’ responded to a survey including the following question. “Thinking of your visit to London overall, what was the best or most enjoyable aspect of your trip?”

Respondents most often said that attractions (both specific [32%] and general [15%]) were the highlight of their trip but on top of this, mentions relating to ‘Art/Culture’ (15%), such as theatres/museums, and ‘History’ (13%) (either built heritage, in the context of the mix of modern aspects, or a more general mention) were common highlights.

“Tower of London, Jack the ripper walking tour, food, just walking around”

“I do love the Natural History Museum. There’re a lot of interesting things... I spent my whole day over there. After coming out from the museum it was quite a nightfall when I saw people were skating on [the] ice field. That moment was so impressive!”

“Not having been to London before I couldn’t believe how close so many sights were to each other, things I’d heard about all my life.”

“Getting around was extremely easy and I loved Westminster Abbey and St. Paul’s Cathedral and Hampton Court Palace and Shakespeare’s Globe Theater and HMS Belfast. I found it to be a beautiful city and everyone we came in contact with, was very helpful and friendly.”

“The theatres were exceptional”

Mix of history and modernity
Many respondents picked up on London’s ability to combine history and heritage with more modern aspects (eg culture, architecture, technology), which helps make it such an interesting and relevant place.

“The sense of History is everywhere. An instant connection to the past, present and future was pervasive throughout London. I will revisit again.”

“I loved the mix of modern and history - it was amazing to see so much mixed together.”

The following section looks at this contrast in more depth, and relates it not just to London, but to Britain as a whole.
Mix of the Old and New

Britain is often described by visitors as offering a “good contrast of old and new” (especially by Americans). A lot of this is because perceptions and expectations of Britain are strongly influenced by its history and tradition and London dominates with its iconic images.

Visitors find a depth of history to Britain to be explored in the architecture, the castles and stately homes, well-known sights and well broadcast pageantry. A substantial number of travellers retain a distinct interest in Britain’s unique history and culture. They remain fascinated by the deeply integrated systems and the history behind Britain today. They do not wish to see it watered down or hidden. However, they are seeking the opportunity to look behind these structures, get involved, dig deeper, and experience it.

We can challenge perceptions of stereotypical Britain by showing people the many different, juxtaposing Britains so for example active Britain, shopping/clubbing Britain, contemplative Britain, deep historical Britain (experientially) and so on. Research conducted by VisitBritain (2009) in Latin America highlights this point nicely. The findings show that London is the key driver for Latin Americans to visit and embodies the mix of modernity and heritage that is Britain’s USP. It is this mix that gives Britain its uniqueness to international visitors. Latin Americans come to Britain for its tradition, heritage and architecture but ALSO for its innovation, a hub of trends, dynamism and buzz. The two have a symbiotic relationship and can’t exist without each other.

This can be done as a whole picture firstly to challenge and reach those who want multiple experiences and secondly as separate communications to target specific audiences (eg adventure seekers in the city and the countryside). 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.

VisitBritain’s Be A Brit Different campaign which ran in the USA in 2007 and 2008 did exactly this and played on the twist of contrasting the old with the new to show Britain in fresh light. For example traditional iconic sights were shown with an element of something unexpected and played on Britain’s “quirkiness” and points of differentiation. It aimed to catch attention through an element of surprise and present potential visitors with a reason to visit Britain now. Examples of the campaign are shown above and opposite. Post-campaign research showed that consumers loved the idea and it made them smile. VisitBritain evaluation figures report that the campaign generated an additional £2.5m in incremental spend from US visitors to the British tourism economy.
Built Heritage

Key Facts Box

- Britain's built heritage is world-class, ranked 4th out of 50 nations by potential visitors
- France and Italy are Britain's major built heritage competitors
- Built Heritage is something that most visitors want to experience, appealing to all ages
- Britain's built heritage is seen to be iconic
- However, it may not provide visitors with a sense of urgency to visit now, so it is important to add an exciting twist to market more effectively
Built Heritage Drives Visits to the UK

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. Over 50% of holiday visitors who come to the UK visit built heritage (IPS, 2006).

Britain is ranked 4th out of 50 nations (by respondents from around the world) in terms of its built heritage - truly world-class. The UK’s built heritage is most highly regarded in Australia, the USA, Canada, and South Africa, relatively young countries with strong cultural and historical links to Britain. However, many other countries also see the UK’s built heritage offering as being very competitive and built heritage provides the backbone for many holiday visits.

Almost all countries rate Britain’s built heritage activities as the best ones to do in Britain, and see them as top priorities if they were to visit Britain - the greatest exceptions being the Nordic nations (NBI). They appeal to all age groups so can be seen as having almost universal appeal.

Famous Buildings

Sightseeing famous buildings and monuments is seen to be one of the best activities that Britain offers, and most potential visitors see themselves as very likely to undertake this activity if they were to visit Britain. It is consistently rated amongst the top 4 or 5 activities on offer in the UK.

Feedback from visitors shows that the “opportunity to see famous buildings and monuments” is a key strength and one that Britain performs exceptionally well on. Therefore built heritage should form the cornerstone of the majority of marketing communications aimed at enticing visitors to explore Britain.

Castles & Stately Homes

Visiting castles/stately homes is regarded as the best activity the UK has to offer and would be potential visitors’ highest priority if they were to visit Britain. Qualitative research tells us that much of this appeal can be attributed to the magical and mysterious charm castles and stately homes give to Britain and that they are tied to its medieval and Celtic history.

Churches

Churches are an important part of the British tourism product. Many people will visit a church while on holiday. Visiting churches or cathedrals gets a slightly mixed press from respondents around the world (although on balance it still seen as a positive activity by most countries). Research shows that although churches and cathedrals are not originally seen to be important when choosing a holiday destination but have an important impact on the visitor’s experience once they are there and are a hidden opportunity.

London is the Gateway

One of the main reasons people come to Britain is largely to visit London. In many countries, especially the ones that are less familiar with Britain and its parts, Britain IS London and there is a lack of awareness of other places outside London to visit. In markets where visitors are more familiar with Britain, other destinations act as a driver to encourage repeat visits. Also awareness in places demonstrates potential for further visits. Britain’s interesting cities and towns are one of Britain’s main strengths and need to be included in all key communications.

Adding Another Dimension to Built Heritage

Sometimes Britain is perceived as being like a museum; it is primarily seen an educational experience rather than one that really provides the emotional connection potential visitors are looking for. It is therefore essential to build on Britain’s built heritage assets to provide an image of Britain (and actual experiences) that meet the emotional needs of potential visitors, creating urgency and excitement to visit now.

Competitors such as France and Italy, who are also seen to excel in offering world-class culture and heritage, are often seen as more ‘romantic’ destinations than the UK, so to differentiate itself the UK’s best strategy may be to concentrate on offering ‘exciting’ experiences.

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.
Importance of Built Heritage as a driver to visit the UK

As discussed in the first chapter of this Culture and Heritage 'Topic Profile', Built Heritage is a strong motivator of visits to the UK. Britain is seen as a world-class destination, being ranked 4th out of 50 nations in the Nation Brands Index (NBI) for its built heritage. Built heritage activities are seen as essential for potential visitors, who both rate castles/stately homes, sightseeing famous buildings/monuments, and visiting churches/cathedrals very highly, and say they would be top priorities on an 'imagined trip' to Britain.

Throughout the remainder of this chapter, we'll see how appealing these activities are to different nationalities and demographic groups and also take a deeper look at who actually visits these locations when they visit Britain.

Britain's rich history and heritage continue to be strong drivers in attracting visitors. Museums, famous monuments and castles/stately homes are all well regarded and interest is reflected in visit numbers.

Research shows that being able to see with one's own eyes places visitors have only ever seen or read about on television, in magazines, textbooks or in literature has very strong allure. As well as places of historical significance, there is interest in seeing places that are locations in books or films or that had been popularised by books or films. (Japan research 2008). Other things people liked about Britain was that it has its own culture and historical heritage, the co-existence of tradition and modernity, is English speaking and is a gateway to Europe. (Korean qualitative research 2006). This mix of heritage and modernity is replicated in findings from VisitBritain’s Austria and Switzerland research (2006) and gives repeat visitors a reason to keep on coming back to Britain.

Britain is also seen as a destination for a cultural family holiday with places to see, things to discover, a culture to experience and a language to speak. London is the main focus of interest as it is an international capital that offers a cosmopolitan experience but has a great deal of history and tradition. Although Britain is viewed as a more appropriate destination for families with teenagers than perhaps one with young children. (Italian families research 2006). Research conducted in Argentina and Brazil (2009) tells us that most visitors from these regions with young children said they would leave their children at home. They felt that many of Britain’s attractions were indoors and cultural and were therefore “wasted on young children.”

Possibly as a result of perceived shared ‘insular’ and independent mentalities, there is a strong affinity between Switzerland and Britain. The main appeal to Swiss visitors is Britain’s scenery/countryside followed by the British way of life, history and culture. They see London as being very different from the rest of Britain and it is thought to be suitable for a ‘taster’ trip before embarking on a longer trip to Britain. Or to be used as a base from which to visit places outside London.

As Britain offers a sense of perceived familiarity - a well defined offer around heritage, culture and history, there is a need to offer fun as well as intellectual interest and for the brand to suggest more variety of experience – not just history and culture. Britain is also seen to be weaker on destination inspiration than some of our key competitors, with our heritage being viewed as somewhat static and not really coming alive.

Additionally, as travelers are becoming much more sophisticated in their travel habits they no longer want to be seen as tourists but instead want to experience a destination. This trend can be seen through the majority of VisitBritain’s research. In destinations where travel (especially long haul) is still a relatively new phenomenon tourists literally want to see as many sights as possible and are known as trophy tourists. In countries where consumers can be classed as experienced travellers there is less emphasis about seeing all the sights but about experiencing them.

In these markets less is definitely more. (This trend is discussed in more depth in Chapter 1.)

Built Heritage Country/Market Competitors

VisitBritain’s 2005 research highlighted the importance of “World Heritage” sites as a key tourist draw and these are often inspired by articles in magazines and TV programmes focusing on “World Heritage” status. Some of our competitors were quick to capitalise on this area with Tourism Australia launching an above the line campaign in September 2007 - focusing on Australia’s World Heritage sites.

Research has consistently shown that Britain’s history and heritage is the biggest attraction to Russian visitors. Russians feel Britain offers a wealth of history and tradition. Potentially Britain’s offer in this arena is stronger than that of the key competitors France and Germany because of the position Britain has in world history. In a similar vein, Eastern Europeans think Britain is a place with an interesting history and heritage that is modern and cosmopolitan. However competitors such as France, Spain and Italy out-perform Britain in terms of Britain’s heritage attributes of the Britain brand.

The more experienced Asian travelers aspire to travel to further away to unfamiliar destinations such as Europe, the US and Canada. Long haul destinations are seen to be places for a special trip or experience - more of a once in a life time type of experience. VisitBritain’s Best Prospects research (2005) shows that interest in Britain was not as high as other long haul destinations such as the US or Europe. Europe is seen to be a highly aspirational as it offers a range of cultures and countries in a single package/trip. However, most visitors who have been to London through the multi-Western Europe destination package tours taking in capitals such as London, Paris and Rome on group or Fully Independent Travel (FIT) tours, show a willingness to revisit Britain as a single destination tour.
World Heritage Sites

World Heritage Sites (WHS) have outstanding universal value for humanity from the point of view of history, art or science.

The 1972 World Heritage Convention aims to protect the values of cultural or natural sites, which could deteriorate or, worse, disappear, often through lack of funding to preserve them. States Parties to the Convention contribute the necessary financial and intellectual resources to protect World Heritage sites.

The World Heritage List includes places many would recognise instantly, as well as less well known places that many may be surprised to find on the list. The World Heritage List is available on UNESCO's World Heritage Internet web site. It identifies its entries as cultural or natural properties. The UK is home to 28 World Heritage Sites.
As discussed in Chapter 1, Britain is ranked 4th out of 50 nations in terms of its built heritage (according to respondents from 20 countries from the Nation Brands Index 2009). But what is each country’s opinion of Britain’s built heritage?

The chart below shows how different countries rate Britain’s built heritage, and how this rating compares to Britain’s top built heritage competitor. The ‘vertical-axis’ shows how each country rates Britain’s built heritage on a scale from 1-7. The ‘horizontal-axis’ shows the difference between how each country rated the UK’s built heritage and the country they regarded as the best in terms of built heritage.

Looking at the above chart allows us to categorise countries into 4 quadrants based on how they view the UK’s built heritage relative to the top competitor.

**MAINTAIN PERCEPTIONS AND PROMOTE** (top-right quadrant): These countries have a positive view of the UK’s built heritage and do not see other countries as being much richer in terms of their built heritage. This means that the UK is in a strong position to compete against them, so promoting the UK’s built heritage in these countries should reap rewards. The UK’s built heritage is most highly regarded in Australia, the USA, Canada, and South Africa – all countries with strong historic and cultural links (and with relatively short histories of their own). However, many other countries also see the UK’s built heritage offering as being very competitive.

**OPPORTUNITY TO IMPROVE PERCEPTIONS** (top-left quadrant): These countries have a positive view of the UK’s built heritage but do not see other countries as being much richer in terms of their built heritage. This means that the UK may be overlooked in favour of other nations where holidays are driven by built heritage. Many of the countries that fall into this category (eg Egypt, France, Italy, China), like the UK, have an abundance of built heritage, so the challenge may be to convince residents of these countries that it is worth visiting a foreign country for built heritage when they already have plenty on their door-steps – perhaps this can be achieved by emphasising interesting differences in built heritage.

**NEED TO IMPROVE PERCEPTIONS** (lower-left quadrant): These countries do not have a positive view of the UK’s built heritage and see other countries as being far richer in terms of their built heritage. This means that a complete overhaul of perceptions would be necessary for them to regard the UK as a destination worth visiting for its built heritage. Of the countries surveyed in the NBI 2009, only Turkey fits into this category.

**HARD TO IMPROVE PERCEPTIONS** (lower-right quadrant): Countries that fall into this category do not have a positive view of the UK’s built heritage but they do not see any other country as being much richer in terms of their built heritage. This may mean that built heritage simply does not appeal to these countries.

However, no country actually fell into this category in the NBI 2009, perhaps providing further support for the idea that built heritage (either in the UK or elsewhere) has strong appeal to consumers.

How Built Heritage is Viewed
**Famous Buildings and Monuments**

**Around the World: Appeal of sightseeing Famous Buildings and Monuments to Potential Visitors**

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

**How to read the chart below:**

The red line shows how respondents from around the world rate sightseeing famous buildings and monuments in Britain compared to other activities. Where the red line is close to the outside of the ‘spider-web’ this indicates that the activity is highly rated compared to other activities. Where the red line is close to the centre of the ‘spider-web’ then the activity is not rated so highly – Britain is seen as better for other activities.

The blue line shows how likely respondents say they would be to sightseeing famous monuments or buildings if they were to visit Britain. Where the blue line is close to the outside of the ‘spider-web’ this indicates that the activity would be a top priority compared to other activities. Where the blue line is close to the centre of the ‘spider-web’ then the activity is not seen as a priority by most potential visitors.

**Sightseeing famous monuments or buildings**

It is clear from the above chart that the majority of countries surveyed regard sightseeing famous buildings and monuments as one of the best activities that Britain offers, and most potential visitors see themselves as likely to undertake this activity if they were to visit Britain.

In fact, sightseeing famous buildings and monuments is consistently rated amongst the top 4 or 5 activities on offer in the UK.

The only countries where perceptions of sightseeing famous buildings and monuments in the UK are not quite so high are in Norway, Sweden, Denmark, Poland, and Estonia, where other activities are seen as being better. Most of this is because these nations are more motivated by the city cultural activities (eg restaurants, shopping, galleries etc.) than the built heritage activities (such as famous buildings and monuments).

All VisitBritain research shows that built heritage and culture are seen as Britain’s key strengths with famous buildings, castles and stately homes the most highly regarded.

Many visitors say that they like to explore new places away from the crowds when on holiday but seeing famous and well-known locations is still very important to them. Part of this interest seems to be attached to Britain’s past. This isn’t necessarily agreement or disagreement with things that Britain has done but a respect for the length of time Britain has had a past and thus a history.

In qualitative research conducted in September 2005, Chinese respondents cited they were very interested in seeing the famous buildings and monuments that represent the key sights of Britain’s history and heritage. They felt an affiliation with Britain’s “1000 year old history” and they see a kinship between themselves and Britain.

Feedback from visitors shows that the “opportunity to see famous buildings and monuments” is a key strength and one that Britain performs exceptionally well on and therefore famous buildings should be the cornerstone of all marketing based material or communications.
Many visitors say that they like to explore new places away from the crowds when on holiday but seeing famous and well-known locations is still very important to them. Part of this interest seems to be attached to Britain’s past. This isn’t necessarily agreement or disagreement with things that Britain has done but a respect for the length of time Britain has had a past and thus a history.

In qualitative research conducted in September 2005, Chinese respondents cited they were very interested in seeing the famous buildings and monuments that represent the key sights of Britain’s history and heritage. They felt an affiliation with Britain’s “1000 year old history” and they see a kinship between themselves and Britain.
**Castles and Stately Homes**

**Around the World: Appeal of Castles / Stately Homes to Potential Visitors**

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Overall, visiting castles/stately homes is regarded as the best activity the UK has to offer and, on average, potential visitors say that visiting castles or stately homes would be their highest priority if they were to visit Britain.

Qualitative research tells us that much of this appeal can be attributed to the magical and mysterious charm castles and stately homes give to Britain and that they are tied to its medieval and Celtic history.

Some of the Asian nations felt that castles and stately homes had a sense of mystery or the unexplained to them which they related to from their own cultures and found highly appealing in Britain. Consumers also expressed an interest in mystery, ghost stories and the like, eg Harry Potter, Agatha Christie, Sherlock Holmes and the Knights of the Round Table. Trip diaries from the research suggested an interest in the unusual, eg having photos taken with “men in skirts” (i.e. Scotsmen). They were also attracted by the idea of staying in luxurious, elegant, aristocratic British hotels such as hotels that have been converted from ancient castles and manor houses. Scotland was clearly associated with the castles, the countryside and legends such as ‘Braveheart’.

However, there are some notable exceptions to this appeal. The Nation Brands Index research shows Norway, Sweden, and Denmark rank visiting castles/stately homes slightly lower (9th, 6th, and 9th respectively) compared to other activities. Potential visitors from these countries also feel that a number of other activities would be more of a priority for a visit to Britain. Visiting castles/stately homes would be 17th, 14th, and 6th on the to-do-list for Norwegians, Swedes, and Danes. Other nations that are not so positive about visiting castles/stately homes include Ireland and India.
Appeal of Castles/Stately Homes to Potential Visitors of Different Age Groups and Genders

The chart below clearly shows that visiting castles/stately homes in Britain would be a top priority for potential visitors of all ages if they were to come to Britain. It is regarded as the highest priority for females aged 25 and over. Even for males under 25, it is seen as the third highest priority out of the 32 listed activities.

Qualitative research explains that people from the Nordic countries have high opinions of Britain’s culture. They are very Anglophile in their outlook and they travel to Britain for the cultural experience in the broadest sense. They are heavily influenced by culture when choosing a holiday destination – but not necessarily by history. Research conducted amongst Finns and Danes shows that they are attracted to Britain’s interesting cities and towns as well as city specific things like restaurants, pubs and bars, shopping, museums and galleries and less inclined to visit castles and stately homes.

On the other hand, although Indians do not rate visiting castles and stately homes as highly as some other nations, research conducted in 2006 shows that Indians are strongly motivated by Britain’s historical offering (especially given the historical ties between the two nations). Britain is very familiar to Indian consumers. They have grown up hearing and reading about Britain. However it is thought that other activities that are more in line with Britain’s cultural heritage are seen to take a higher priority over visiting castles and stately homes.

Moving forward, the appeal of these historic institutions could be further broadened by incorporating different activities and in turn satisfying different consumer needs. So, for example, a special interest cooking group could learn to cook British food in a historic castle or perhaps visitors could put a stately home to bed.

[Chart showing claimed likelihood to participate in activity (relative to other activities) by age & gender]
Around the World: Appeal of visiting churches and cathedrals to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain. The results of this question are displayed below.

Visiting churches or cathedrals

Churches are an important part of the British tourism product. Many people will visit a church while on holiday. Many churches attract visitors because of their architectural and historical interest. Some have particular features of interest, such as stained glass windows or wall paintings, others have connections with famous people whilst some are of pilgrimage importance.

Churches can also provide fascinating insights into the history and present day life of the communities over which they preside. Churches are also frequently used for musical or theatrical productions, ranging from choral concerts, organ recitals and brass band concerts, to religious plays, children’s dramas and poetry readings. In addition some churches are even used for exhibitions and festivals which, in turn, are of often of interest to visitors.

As can be seen from the chart above, according to the Nation Brands Index, visiting churches or cathedrals gets a mixed press from respondents around the world (although on balance it still seen as a positive activity by most countries). Overall it is rated as the 5th best activity to do in the UK, and ranks 6th on the to-do list. In general, Western European countries, Eastern European countries, Latin American countries, English-speaking countries, together with Japan and China have the strongest appreciation of Britain’s churches and cathedrals.

However, consistent with their attitudes towards other activities based around built heritage in Britain, the Nordic countries (Norway, Sweden, and Denmark) do not rate visiting churches or cathedrals particularly highly.

Other countries such as Egypt, Malaysia, and Indonesia, do not have the same appreciation for Britain’s historic places of worship, possibly owing more to a different religious perspective than a lack of interest in built heritage in general.
Many people will visit a church they are passing largely on impulse. Visiting a church will be part of another activity relating to the village or the surrounding area. They may be on a walk or cycle ride, having lunch at the village pub, or visiting other attractions in the area.

Some people will visit churches because of personal or family connections. Their descendants may be buried there, for example, or it could be the church where they were christened, or where their parents were married.

Some people will visit churches because of some connection they have with a famous person. Many people, for example, visit St Mary’s in Scarborough because it is where Anne Bronte is buried and St Mary’s in Thirsk attracts significant numbers of visitors because of its connections with James Herriot. (Researching ancestry is discussed in more depth in Chapter 3, Cultural Heritage, of this Topic Profile.)

Some people will visit churches because of a specific interest in church architecture, or a specific aspect of churches, such as stained glass windows, wall paintings, or brasses.

Hidden opportunity
VisitBritain’s Visitor Satisfaction research conducted in 2007 amongst 6 European countries (France, Germany, Italy, Spain, Ireland and Britain) shows that although churches and cathedrals are not originally seen to be important when choosing a holiday destination they have an important impact on the visitor’s experience once they are there. By encouraging more visitors to visit Britain’s cathedrals and churches once they are already in Britain could come as a pleasant surprise to many visitors and improve their stay further.

There is not a lot of research about why people visit churches however a study conducted by Peter Howard, a lecturer in heritage tourism at Plymouth University explains that: Many people are drawn to churches for spiritual reasons, to pray, to light a candle for a friend or relative, for pilgrimage reasons, or simply to enjoy the peace and tranquility of the church.
Visitors to Britain’s Built Heritage

How many visitors…
According to the IPS, 9.8 million visitors from overseas (30%) visited the UK’s castles, churches, monuments, or historic houses in 2006.

Journey Purpose
Visiting the UK’s castles, churches, monuments, or historic houses was undertaken by:
• 54% of Holiday visitors
• 27% of VFR visitors
• 8% of Business visitors
• 14% of Study Visitors
• 52% of Miscellaneous visitors

Top Markets by Volume
Almost 1.7 million visitors from the USA visited built heritage in 2006, followed by almost 1.2 million from France, and over 1.1 million from Germany. This is not surprising given that these are three of Britain’s largest inbound markets.

Another large inbound market, Ireland, provided just over 300,000 visitors who went to built heritage – given that the UK regularly receives about 3 million visits from Ireland each year, this represents a relatively small proportion.

Top Markets by Percent
Looking at the proportion of visitors from each market who visit built heritage, Argentinians are most likely to go (56%), and other Latin Americans are very likely too (Mexico 50%, Brazil 44%).

As we saw, countries with strong historic links rate Britain’s built heritage very highly, so it is no surprise that they are also very likely to be found visiting the UK’s castles, churches, monuments, or historic houses with 52% of visitors from New Zealand, 50% from Australia, 43% from the USA, 42% from Canada, and 40% from South Africa doing so.

Which demographic groups are most likely to visit the UK’s built heritage
Younger visitors (both male and female) are most likely to visit Britain’s built heritage, but older visitors are also fairly likely with 34% of over 65s doing so. Amongst other age groups, females were more likely to visit built heritage than males, but this is largely due to the higher proportion of male visitors who are in the UK on business. Indeed, when just looking at holiday visitors, 56% of females went to built heritage locations compared to 52% of males.

![Visiting Castles, Churches, Monuments, Historic Houses: Top Markets by Volume 2006](image)

![Visiting Castles, Churches, Monuments, Historic Houses: Top Markets by Percentage 2006](image)
In 2008, 22 of the top 25 visitor attractions for which figures are available can be described as relying on Britain’s Built Heritage, Cultural Heritage or Contemporary Culture in order to get customers in through the front door.

The figures, published by the Association of Leading Visitor Attractions (ALVA) reveal that the British Museum welcomed nearly six million visitors during 2008, making it the most visited cultural heritage attraction in Britain. The top attraction in the Contemporary Culture category is Tate Modern, with very nearly five million visits.

The Tower of London was the most visited Built Heritage attraction across the ALVA membership reporting data, with 2.2 million visitors in 2008.

It is noteworthy that all of the top ten attractions are to be found in London, as are 17 out of the top 25.

The figures in the table cover both inbound and domestic visitor admissions, but with around 15 million international visitors spending time in London each year we can be sure that a significant proportion of those entering attractions such as Tate Modern and the Tower of London will be visiting Britain from overseas.

**Free Museums**

The decision to restore free entry to Britain’s national museums was taken in 2001. As a result of this decision the number of museum visits has doubled and the number of overseas visitors trebled. Some privately run museums (which are not part of the free entry scheme) have experienced consequential drop in visitor numbers. Visits are up by 87% since 2001 due to the Government’s policy of free admission to DCMS-sponsored museums.

Figures published by the DCMS in June 2007 showed that there were nearly 7 million extra visits to England’s national museums and galleries which had formerly charged compared with the year before entry charges were scrapped. The most impressive increases in London were in the South Kensington museums and in the regions there were huge rises in Liverpool, the Natural History Museum at Tring and the National Railway Museum in York.
Interesting Towns and Cities

One of the main reasons people come to Britain is largely to visit London. London is a place many of them have grown up hearing about through the media, on television, in films, through popular culture, celebrities and so on. In many markets, especially the ones that are less familiar with Britain and its parts (i.e. Scotland, Wales and England), Britain IS London and there is a lack of awareness of other places outside London to visit.

However, in markets where visitors are more familiar with Britain, other destinations and cities act as a driver to encourage repeat visits. Also awareness in places such as Scotland demonstrates potential for further visits. Trips to regional cities offer an alternative and authentic experience that gives visitors the opportunity to get out of London and off the well beaten London tourist trail. Regional cities help address needs a holiday in London doesn’t always fully meet:

• The need to relax - Busy, packed, stimulating experiences are also tiring
• Desire to discover, to be a bit alternative, feel a bit of an explorer as well as a tourist
• Want to do icons but aspire to a feeling of exploring, discovering for self
• Desire to connect with the people – feel this is more possible and enjoyable with the local people.

However, the main barriers stopping people from travelling to other destinations are:

• Lack of specific knowledge – where do I go and what exactly can I do?
• Expensive turn-up-on-the-day train tickets
• How to get there from London (or indeed cheap flights from other European destinations) and reassurance it is quite quick and easy
• Possibly may need some way to help get around

Interesting cities and towns is a key factor especially amongst younger travellers as they are perceived to be trendy and fashionable destinations (largely due to the media and music/art events). VisitBritain’s European Youth research (2008) tells us that having fun and an exciting time are the main motivations for holidaying abroad. This was essential for over 40% of youths and was particularly so for the Portuguese and Russian youths. Relaxing with family, friends and treating themselves and learning about another culture are other important reasons for travelling. The research also showed that the primary motivation to travel to Britain was for its famous buildings, museums, art galleries and interesting towns and cities. Encouragingly, this was cited by almost one in five youths.

Although we know that 4/5 youths may not feel that Britain’s built heritage is a primary reason to visit the research shows that previous youth visitors to Britain did in fact visit many of Britain’s historical sights. Main activities undertaken were visiting historic buildings (66%), famous towns (65%), museums (56%) and castles/stately homes and churches and cathedrals (both 50%).

The onslaught of low cost airlines has also helped to grow the predominately European short breaks and cities breaks market as well as helping regional spread.

London is perceived as a permanently fashionable destination and amongst the upper classes London is regaining its up-market trendy image and is attracting high-spending shoppers. Lifestyle trends, design hotels, spas, trendy shops and fashionable destinations offering unique experiences all appeal to these high net worths.

However although consumer familiarity with London’s famous icons is a good thing, there is a sense that it lacks the excitement of seeing something new. There is also a danger that Britain or London is slowly being de-prioritised by newer, more exciting destinations (such as Asia). Research shows that most people feel they should visit London/Britain at least once in their life-time but the problem seems to be convincing people to come now. There is a sense that it has been around for so many years there is no rush to visit it next.

For Nordic residents, London remains the most popular city destination outside the Nordic region. Like other nationalities, Nordic people visit London to enjoy the multitude of attractions of a large city: shopping, cultural events, sports events and theatres. The main reasons them to travel to Britain is largely driven by city based activities. Key drivers are interesting cities and towns, shopping and to visit famous buildings and monuments. Britain is also shown to offer a mix of old and new. On the one hand it is seen to be quite a traditional destination that has an interesting history and heritage but it is also seen to be modern, vibrant, cosmopolitan and always has something new to discover.

Britain’s easily accessible public transport system is another reason visitors enjoy exploring different areas around Britain and British cities. Research showed that young Spaniards were most impressed with Britain’s interesting cities and towns, and found getting around easy with accessible public transport. They displayed a positive attitude towards Britain (music scene, shopping, fashion, “in” destination) and have a high propensity to use online services, including low-cost airlines. With high disposable time and networking possibilities, they offer lifetime value.

Although Britain’s transport system is a big positive, many visitors are still confused about how long it takes to get from city to city and how easy it really is (especially poor English speakers). Additionally, travellers that come from fairly large countries such as Canada or Australia where they can drive 5 or 6 hours to visit a friend, find it difficult to visualise that they can get to another country (Cardiff to London) in 3 hours by train.

The Visitor Satisfaction research conducted in 2007 amongst 6 European markets really highlights that Britain’s interesting cities and towns is one of Britain’s main strengths and needs to be included in all key communication.
The Anholt - GMI Nation Brands Index (NBI) for Wave 3 2007 included a question to understand which iconic British images respondents would choose (as a postcard) to communicate to their friends back at home that they were in Britain.

25,000 participants were asked to imagine they had to send a picture postcard telling a friend that they were on holiday in Britain. They were then asked to choose one British icon to best communicate that they were in Britain. The overall results are shown in the chart below.

The RED DOUBLE DECKER BUS (24%) was seen most often as the iconic image that communicates 'being in Britain', followed by the CASTLE in the Highlands (20%), and the QUEEN (11%).

These, along with the RED PHONE BOXES (10%), consistently ranked in the top 3 iconic images chosen by each country.

Qualitative research showed a similar picture in that most top-of-mind associations sit more on the traditional and stereotypical side with Britain. Positive associations tend to be London focused such as Big Ben and changing of the guard, London Eye, Hyde Park, old buildings, churches, Royal family, football, theatre, pop music and shops such as Harrods and Selfridges. Although, it is positive that consumers have such strong images of Britain, we need to ensure that consumer perceptions are also based on real modern day Britain - not a Britain as depicted in Victorian literature, shrouded in a time warp of yesteryear, or London based cliches.

Imagine you had to send a picture postcard telling a friend that you were on holiday in Britain. Which of the following British icons would you choose to best communicate that you were in Britain?
'Tourism' Word Associations - Educational Britain

In the NBI 2009, online respondents from around the world were asked to choose words from a list they would associate with the UK as a place to visit. Most respondents had not visited the UK, so the following findings are based on a mixture of perceptions and reality.

Of the words listed to choose from, 35% of respondents saw the UK as 'Educational', 30% as 'Fascinating', and 28% as 'Exciting'. Whilst each of these words is positive, an 'educational' destination in itself does not arguably meet the emotional needs of the majority of holiday-makers. Therefore 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.

Competitors such as France and Italy, who are also seen to excel in offering world-class culture and heritage are often seen as more 'romantic' destinations than the UK, so to differentiate itself the UK's best strategy may be to concentrate on offering 'exciting' experiences.

Britain as a 'Museum'

The findings opposite have also been reflected in numerous qualitative research projects that VisitBritain has conducted around the world. Research commissioned by VisitBritain in Canada, Australia, and New Zealand showed that Britain is often seen as 'safe and cerebral', and is often perceived to be more about the sights than experiences.

Sometimes Britain is referred to as being like a museum; it is primarily an educational experience rather than one that really provides the emotional connection potential visitors are looking for. It is therefore essential to build on Britain's built heritage assets to provide an image of Britain (and actual experiences) that meet the emotional needs of potential visitors, creating urgency and excitement to visit now.
VisitBritain Brazil Campaign 2009

In November 2009 VisitBritain launched a consumer advertising campaign in partnership with British Airways in Brazil and Mexico encouraging consumers to "take another look" at Britain.

The campaign was driven by insights from qualitative research carried out earlier in the year where consumers indicated that although Britain was an appealing destination, it lacked the emotional and aspirational appeal of competitors, and hence lacked urgency and appeal to visit. Even though Britain’s culture and heritage was seen as a main driver for visiting the country, it was considered to be too much of an educational experience and not enjoyable; and Britain’s people were also considered to be rather boring.

To counter this VisitBritain put together a campaign which harnessed the misconceptions of the market by tackling them head-on and injected a sense of excitement and energy into a trip to Britain, emphasising that the destination is not the same place they thought it was.

In the creative the headlines humorously acknowledge the misconception of Britain, while a strong accompanying image demonstrates the antithesis, challenging the consumer’s perception of the destination. A subheading with a flight offer from British Airways then provides the urgency to book and visit.

By creating a sense of excitement in the campaign creative, we were able to bring Britain’s heritage and culture to life for the Latin American consumer, helping to shift perceptions of the destination in market and create a compelling case to travel.

Examples of the campaign material are displayed below and opposite, for more information on VisitBritain’s work in Latin America contact robin.johnson@visitbritain.org

---

O BRITÂNICO
Tímido, reservado e frío?

Viaje conosco para a Grã-Bretanha.
Voos British Airways a partir de U$ 690 mais taxas*

Conheça nossa história de uma forma diferente. Existem outras maneiras divertidas de aprender sobre nosso patrimônio e cultura além das aulas e dos livros. Experimente uma viagem de aventura pelo Rio Tâmisa, isso é só o começo...

Reserve agora visitbritain.com.br/BA ou consulte seu agente de viagem.

*Consulte os termos e condições. Visite nosso site para mais informações.
Cultural Heritage

Key Facts Box

• Britain is ranked 7th out of 50 nations for cultural heritage

• Key competitors are Italy and France

• Britain’s museums are a key strength - popular and free

• Pubs are a real asset, allowing visitors to join in with authentic British life

• Britain’s royal heritage plays a crucial role and is strongly associated with Britain

• Football was born in Britain and is highly appealing to male youths, Nordic and Asian nations

• The Performing Arts and Cultural Events are ‘hidden opportunities’

• The UK is consistently seen as one of the best nations in the world for study
Britain’s Cultural Heritage is Renowned Around the World

Britain is ranked 7th out of 50 nations in terms of its cultural heritage, 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.

Egypt, India, Mexico, France, and Italy, like the UK, are regarded to have a rich cultural heritage, so the challenge is to convince residents of these countries that the UK’s cultural heritage is interesting and different to theirs and provides a real draw to visit.

Often, Different Activities are Appealing to Different Groups

As each nation of the world has its 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.

As well as differences by nationality, many activities also appeal more to different age groups than others.

Museums and Galleries

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.

Indeed they are not just for the mature visitor, visiting museums was the third most popular activity undertaken by European youths whilst on a holiday to Britain. IPS figures also show that youths frequently go to museums and galleries.

Britain’s museums and galleries are key activities undertaken by visitors when in Britain. Over 40% of Holiday visitors went to museums or galleries in 2006.

Galleries are also highly rated as an activity (8th) but rank just 17th on potential visitors’ to-do-lists. They have more appeal for older visitors than younger ones, especially amongst males. Britain’s art galleries are highly regarded by the majority of nations, but are not everybody’s cup of tea.

Cultural Icons

Over the centuries, Britain has had a huge amount of influence on world culture and many visitors have an interest in Britain’s icons and symbols they have heard so much about. However not all nations identify with modern British cultural icons. Research in the Middle East shows that some British celebrities are regarded as being morally incorrect and scruffy cultural representatives. Potential visitors from the Middle East don’t identify with them and they don’t do anything to inspire them to visit Britain.

Performing Arts

Going to the theatre, opera, or ballet in Britain is regarded most highly in the Nordic nations, Asia, and parts of Latin America. 10% of visitors from overseas (and 18% of Holiday visitors) actually went to see the Performing Arts in 2006.

Research undertaken for VisitBritain by TNS in 2007 showed that opportunities to see theatre and performing arts in Britain is a ‘hidden opportunity’. Hidden opportunities aren’t regarded as important in choosing a holiday destination, but they do have a sizeable impact on visitors’ experiences. Encouraging more visitors to get involved with these highly rated activities once they have decided to come to Britain in the first place should help drive repeat visits and recommendation of Britain as a destination.

Gardens

Britain’s gardens stand out as being particularly appealing to the Japanese and Egyptian markets, but are highly regarded by the majority of nations. Visitors often say “what a lovely surprise it is to find secret green spaces” in Britain – particularly in London where it is often unexpected.

Gardens would be a high priority for older visitors if they were to visit Britain, especially for females. For females aged 55-64, visiting gardens would be fifth on their to do list (out of 32 activities), so gardens could be a fantastic way of pulling in the growing seniors demographic to Britain.

Pubs

Going to a pub in Britain is far more appealing to more mature markets than emerging ones, and to younger visitors than older ones. Visitors aged 16-34 are more likely than other age groups to be found in a pub, but older visitors often go too. British pubs consistently ride high 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. It also found that pubs are a chance to feel part of an authentic British life and to join in.

Cultural Heritage Summary
Food and Drink
Food and drink in a holiday context provide direct access to a local culture because of the interaction with local people. Although Britain can have a fairly poor food reputation many visitors report the food was much better than they expected. Drinks were perceived as another facet of the food reputation, and here Britain is felt to fare rather well. As well as the distinctive drinks themselves, the sense of ritual and local customs suggested a distinctive and vibrant way of life.

Shared Culture
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. However, there is a sense that Britain is associated with the past and is not necessarily associated with the future.

Researching Ancestry
Researching ancestry was not, as a rule, most visitors primary purpose for travelling to Britain (and only 1.5% of visitors researched Ancestry in 2007). Visitors more often came for a holiday or to visit friends and family and finding out “where we came from” and the actual regional area of ancestry are additional elements which add to the trip.

Sports
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. The most important market for watching sport in Britain is the Irish Republic. Other markets where watching sport was regularly cited as being a primary motivator include the four Northern European markets. Although watching sports is sometimes a primary motivator to visit Britain, this is more often the case for particular individuals rather than for everybody.

As might be expected, watching football matches polarises opinion. Amongst the majority of females of all ages, going to a football match would be very low on their priority list if they were to visit Britain. Amongst males, a different story emerges. 18-24 year olds regard it as a top priority, and it is also very appealing for 25-34 year olds. It is less appealing to the 35+ age group, but still of interest to a many.

Watching football is rated as the best activity Britain has to offer by the Irish, Norwegians, Swedes, Danes, Singaporeans, and Malaysians, and it’s rated very highly by Koreans, Indonesians, Czechs, and Estonians.

Study
The UK is consistently seen as one of the best nations in the world for study (NBI). Britain’s main study markets are typically France, Italy, Spain, Germany, the USA and Russia, but in recent years there has been a steady decline in the number of short-term inbound study visits.

The main reasons foreign students come to study in Britain are for its excellent academic reputation and that people feel that it will improve their career prospects back in their home country. Conversely, barriers preventing students from coming to Britain to study revolve around the high cost of living, the cost of tuition fees and where applicable, visas.

Although foreign nationals study a wide variety of courses here in Britain a large proportion of people that have studied in the UK had studied a language course. British English has a certain snob value over its competitors – the USA, Canada and Australia. Learning English in Britain is highly regarded as an activity in countries where English is not so widely spoken.

Royal Heritage
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. British Royalty is linked to Britain’s strong tradition and heritage image, and ‘royalty’ and ‘the Queen’ are key associations that people have with Britain. Therefore it is no surprise to find that visiting places associated with the Royal Family/Monarchy is regarded as one of the best activities to do in Britain (ranked 3rd). There is some variation in how the activity is perceived by different nations. However, on balance, it is of more interest to emerging markets than developed ones.

Cultural Events
Cultural events are an extremely important part of Britain’s cultural heritage. Although fixed attractions are more important than events in terms of city visits, events and festivals are effective tools in attracting first time and repeat visitors alike. This is often because events are unique and take place in a limited timeframe, they form an extra reason for cultural tourists to visit a place. Britain performs above average in terms of the availability of cultural events, music and festivals and should be used as an opportunity to attract new and existing visitors.
Cultural Heritage as a Motivator to Visit Britain

As discussed in the first chapter of this Culture and Heritage ‘Topic Profile’, Cultural Heritage does motivate trips to Britain, but often not to the same extent as Built Heritage does. One reason for this might be because certain cultural heritage activities appeal more to particular markets or demographic groups than others, whereas Britain’s built heritage enjoys universal appeal.

For example, watching football matches is far more appealing to men than women, and most appealing to younger age groups. Researching ancestry is far more relevant to markets with strong historical links to Britain, such as New Zealand and Australia.

This means it is very important to understand which activities appeal to which markets and demographic groups in order to ensure that marketing materials are targeted in the most relevant and enticing way. The rest of this chapter will help to show not only who activities are appealing to but also why. It will also look at how many people actually undertake cultural heritage activities in Britain and who they are. Some activities, such as going to the pub are very popular and rewarding experiences for visitors and appeal to a wide variety of people.

This type of activity helps activities help visitors to get beneath the surface and discover what Britain is all about. As we saw in the first chapter, most travellers are increasingly looking for deeper experiences, so encouraging them to connect with Britain’s cultural heritage is likely to add to the richness of their visit.

Cultural Heritage Competitors/Market Competitors

Research frequently shows that nations with a long history or ancient civilisations are considered to have a rich cultural heritage. As many of these cultures have evolved from different starting points throughout the years, each can be considered to be distinct from another. The cultural heritage of Egypt is very different to that of Japan, which in turn is very different to that of India.

The nations whose cultural heritage is closest to Britain’s are arguably other European nations, who have often shared an intertwined history, with France and Italy the most renowned examples. This means these can be seen as Britain’s most direct competitors in terms of cultural heritage. It can be argued that other nations, outside Europe, are not competing directly with Britain; visiting one of these nations does not necessarily mean that someone would decide not to visit Britain in future. Each offers a unique and different experience.

Having said this, Britain also has plenty in common with other nations, and this often stems from Britain’s colonial past. Britain’s culture has spread far and wide, so often potential visitors already have an understanding of what Britain can offer. For many visitors (especially those from the USA, Canada, New Zealand, and Australia), a trip to Britain can feel familiar enough to feel like home, which can be very positive, but it also alerts us to the need to highlight Britain’s hidden gems to add another dimension to the trip.

Importance of the Regions

To many visitors, especially those that are not that familiar with Britain and its constituent parts, London is Britain. Much of this can be attributed to the part that London played in history and the world media. London is also often considered to be a gateway to Europe or one of the few British destinations to be included as part of a European tour.

However the regions are key in giving visitors a reason to come back to Britain. They act as secondary drivers which add different elements to a visitor’s trip or introduce visitors to parts of Britain they had previously not know or thought about.

Each region in Britain has its very own ‘cultural heritage’. Each is famous for certain types of food, drink, or local traditions. Part of this can be attributed to the fact that up until the Industrial Revolution almost everyone stayed in their local vicinity their whole lives. As did their parents, and their parents before that and so on. As a result a strong local cultural heritage has developed in all parts of Britain which is different and distinctive to the next.

This regional experience adds a depth and richness to a visitor’s trip which offers an authenticity and a feeling of getting off the tourist trail. It can also help to re-address negative perceptions of welcome and cost.
How Cultural Heritage is Viewed

As discussed in Chapter 1, Britain is ranked 7th out of 50 nations in terms of its cultural heritage (according to respondents from 20 countries from the Nation Brands Index 2009). But what is each country’s opinion of Britain’s cultural heritage?

The chart below shows how different countries rate Britain’s cultural heritage, and how this rating compares to Britain’s top cultural heritage competitor. The ‘vertical-axis’ shows how each country rates Britain’s cultural heritage on a scale from 1-7. The ‘horizontal-axis’ shows the difference between how each country rated the UK’s cultural heritage and the country they regarded as the best in terms of cultural heritage.

Looking at the below chart allows us to categorise countries into 4 quadrants based on how they view the UK’s cultural heritage relative the top competitor.

### Maintain Perceptions and Promote (top-right quadrant)
These countries have a positive view of the UK’s cultural heritage and do not see other countries as being much richer in terms of their cultural heritage. This means that the UK is in a strong position to compete against them, so promoting the UK’s cultural heritage in these countries should reap rewards. The UK’s cultural heritage is most highly regarded in the USA, Australia, Canada, South Africa, Poland, Argentina, and Russia. Countries that have ancestral or historical links with Britain (such as the US, Australia, Canada and South Africa) are going to be interested in Britain’s cultural heritage as to a large extent it could be considered part of their own. Russians respect Britain’s wealth of history and tradition. They admire Britain’s place in world history and thus Britain’s heritage. (Russia Qualitative research 2005).

Other countries such as Sweden, Japan, and Korea also see the UK’s cultural heritage as world-class.

### Opportunity to Improve Perceptions (top-left quadrant)
Countries have a positive view of the UK’s cultural heritage but see other countries as having a richer cultural heritage. This means that the UK may be overlooked in favour of other nations where holidays are driven by cultural heritage. Many of the countries that fall into this category (eg Egypt, India, Mexico, France, and Italy), like the UK, are regarded to have a rich cultural heritage, so the challenge may be to convince residents of these countries that the UK’s cultural heritage is interesting and different to theirs, providing a real draw to visit when they already have a rich heritage of their own.

### Need to Improve Perceptions (lower-left quadrant)
These countries do not have a positive view of the UK’s cultural heritage and see other countries as being far richer in terms of their cultural heritage. This means that a complete overhaul of perceptions would be necessary for them to regard the UK as a destination worth visiting for its cultural heritage. Of the countries surveyed in the NBI 2009, only Turkey fits into this category.

### Hard to Improve Perceptions (lower-right quadrant)
Countries that fall into this category do not have a positive view of the UK’s cultural heritage but they do not see any other country as being much richer in terms of their cultural heritage. This may mean that cultural heritage simply does not appeal to these countries.

However, no country actually fell into this category in the NBI 2009, perhaps supporting the idea that cultural heritage (either in the UK or elsewhere) has strong appeal to consumers.
Museums and Galleries

Around the World: Appeal of sightseeing Museums and Galleries to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

How to read the chart below:
The red line shows how respondents from around the world rate visiting museums in Britain compared to other activities. Where the red line is close to the outside of the ‘spider-web’ this indicates that the activity is highly rated compared to other activities. Where the red line is close to the centre of the ‘spider-web’ then the activity is not rated so highly – Britain is seen as better for other activities.

The blue line shows how likely respondents say they would be to visiting museums if they were to visit Britain. Where the blue line is close to the outside of the ‘spider-web’ this indicates that the activity would be a top priority compared to other activities. Where the blue line is close to the centre of the ‘spider-web’ then the activity is not seen as a priority by most potential visitors.

Visiting museums

Visiting Britain’s world famous museums and galleries is one of the main reasons people come to Britain. Whilst the chart above shows that respondents from different countries rarely rate visiting museums as the best activity to do in Britain, the consistently positive ratings mean that overall, visiting museums is rated as the 4th best activity in Britain and ranks 3rd on potential visitors’ to-do-lists.

Japan is the only nation to rate visiting museums as the number one activity in Britain (both in terms of rating and likelihood to do).

Going to galleries and museums appealed particularly to older Japanese tourists who are interested in visual arts. They regularly watched TV programmes about the visual arts, many had paintings in their home, and some did painting themselves.

Many were excited by the idea of seeing art that was world-famous and/or particular to a certain country. Even for those who were not particularly interested in visual arts per se art galleries and museums were often appealing as “famous spots” or “something one must do”. As expressed by one woman “I don’t go to art galleries in Japan but when I travel overseas I get the urge to go to art galleries.”

(Japan Qualitative research 2008)
Museums and Galleries (continued)

**Appeal of Museums to Potential Visitors of Different Age Groups and Genders**

The chart below shows that the majority of potential visitors to Britain of all age groups would see themselves going to a museum if they visited. For over 35s, museums held the strongest appeal. Amongst males, 18-24s felt museums were slightly less of a priority, and this extended to 18-34 year olds amongst females.

Almost all our research shows that Britain’s museums and galleries are key activities undertaken by visitors when in Britain. Furthermore, museums and galleries are not just for the mature visitor, as the European Youth research 2008 clearly demonstrates. Visiting museums was the third most popular activity undertaken by European youths whilst on a holiday to Britain.

Britain’s museums and galleries spend a lot of time trying to reach a broad audience of people. For example the Tate Liverpool’s has developed a learning program which has a varied activities program for a wide range of audiences. The aim of the program is to broaden participation and engagement whilst increasing knowledge, understanding and enjoyment of the visual arts. These include activities and events for groups such as schools, communities, young people and families.

Analysis by TNS (2007) shows that visitors to Britain feel that Britain has very good “opportunities to visit museums & galleries” and this is a driver in motivating people to Britain. It is an opportunity which could be further exploited and could help distinguish Britain from our European competitors.

**Value for Money**

Research consistently tells us that both visitors and prospective visitors talk about the perceived expense of Britain. Visitors talk about not only the cost of getting to Britain but also the cost of being here (eg the cost of eating out, accommodation, attractions etc).

This has been exacerbated by the strong pound between 2003 - 2007. However, the weakening of the pound presents opportunities to highlight that Britain is not as expensive as it once was. Whilst Britain will never be a ‘cheap and cheerful’ destination, offering perceived value and added rewards, as well as Britain’s world class experiences would go a long way to readdress these perceptions.

We need to challenge perceptions by promoting cheaper options and really highlighting the number of free tourist attractions Britain has on offer. The decision to restore free entry to Britain’s national museums was taken in 2001. As a result of this decision the number of museum visits has doubled and the number of overseas visitors trebled. (For more information on Britain’s 300 free museums or attractions please refer to the Attractions case Study in the Built Heritage Chapter 2).

Additionally, many visitors are unaware of the plethora of good value options that Britain has on offer. For example products such as The Great British Heritage Pass offer entry to more than 580 of Great Britain’s most popular heritage sights, including properties under the care of National Trust, English Heritage, National Trust for Scotland, Historic Scotland, and Cadw. The average price for a British attraction is roughly £10 and the GBH allows visitors to visit as many attractions as they like over a four day period for £28.50.

There are also many things to do for free in Britain such as watching street performers, visiting one of Britain’s many national parks, watching a carnival, festival or parade, the changing of the guard, watching recordings of a British TV programmes etc.

In order to help address perceptions of high cost and take advantage of the weak pound, VisitBritain has launched its ‘Value Campaign’. The campaign is being run both domestically and internationally and highlights good deals available from the industry and free access to national museums and galleries.
How many visitors…
According to the IPS, 7.4 million visitors from overseas (23%) visited the UK’s museums or art galleries in 2006.

Journey Purpose
Visiting the UK’s museums and galleries was undertaken by:
- 41% of Holiday visitors
- 19% of VFR visitors
- 7% of Business visitors
- 11% of Miscellaneous visitors
- 48% of Study visitors

Top Markets by Volume
Almost 1.3 million visitors from the USA visited the UK’s museums/galleries in 2006, followed by almost 1.0 million from France, and almost 800,000 from Germany. This is not surprising given that these are three of Britain’s largest inbound markets.

Top Markets by Percent
Looking at the proportion of visitors from each market who go to museums/galleries, Argentinians are most likely to go (54%), and other Latin Americans are very likely too (Mexico 46%, Brazil 41%). Visitors from outside Europe have a higher propensity to go to museums/galleries than visitors from Europe – Russia was the only European nation to rank in the top ten in percentage terms.
Art Galleries

Around the World: Appeal of Visiting Art Galleries to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Visitng art galleries

Britain’s art galleries are highly regarded by the majority of nations, but are not everybody’s cup of tea. Overall, visiting galleries is regarded as the 8th best activity in Britain but it ranks just 17th on potential visitors’ to do lists. Art galleries have high appeal to Latin Americans, Spanish, Italians, Portuguese, Hungarians, Russians, Turks, Indians, Koreans, and Chinese.

However, they have low appeal for the Nordic nations (Norway, Sweden, Denmark), who neither rate the prospect of going to an art gallery highly, nor say they would be likely to do it.

Other nations such as France, Belgium, the Czech Republic, South Africa, Japan, New Zealand, Australia, and Canada regard Britain’s art galleries quite positively but would rather prioritise other activities if they were to visit Britain.

Appeal of Art Galleries to Potential Visitors of Different Age Groups and Genders
The chart below shows that art galleries hold a fairly consistent level of appeal amongst females of all ages, whilst older males show more of a preference for them than younger ones. On average, visiting art galleries would not be a top priority for any of the demographic groups, but Britain is regarded as an excellent destination for art galleries, so many visitors do make time for it.
Going to the theatre, opera, or ballet is regarded most highly in the Nordic nations (Norway, Sweden, Denmark), Asian nations (such as Korea, Singapore, Indonesia, China, or Japan), and parts of Latin America (Brazil, Mexico).

As Asian countries such as Japan, China, Korea, and Indonesia are world renowned for traditional performing arts, Asian visitors are interested in experiencing traditional British cultural activities such as going to the theatre, opera, or ballet.

However, even though potential visitors from these nations are quite positive about Britain’s performing arts, they regard other activities as being a higher priority. Overall, going to the theatre, opera, or ballet is regarded as 19th best activity to undertake in Britain, but is ranked just 24th in terms of claimed likelihood to undertake.

Therefore it should not be regarded as a core driver of getting people to Britain but should be seen as an activity that has strong appeal to some people but not to everyone. Research undertaken for VisitBritain by TNS in 2007 showed that opportunities to see theatre and performing arts in Britain is a ‘hidden opportunity’. Hidden opportunities aren’t regarded as important in choosing a holiday destination, but they do have a sizeable impact on visitors’ experiences. Encouraging more visitors to get involved with these highly rated activities once they have decided to come to Britain in the first place should help drive repeat visits and recommendation of Britain as a destination.

The chart below shows that going to the theatre, opera, or ballet is a higher priority for females than males, and for older potential visitors, rather than younger ones. On average, an excursion to the performing arts would be 19th on the to-do-list of 55-64 year old females if they were to visit Britain.
How many visitors…
According to the IPS, 3.3 million visitors from overseas (10%) went to the theatre, ballet, opera, or concert in 2006.

Journey Purpose
Going to the UK’s theatre, opera, or ballet was undertaken by:
• 18% of Holiday visitors
• 9% of VFR visitors
• 3% of Business visitors
• 6% of Miscellaneous visitors
• 22% of Study visitors

Top Markets by Volume
Over 700,000 visitors from the USA went to the see the UK’s performing arts in 2006, over twice the number from any other nation. Over 320,000 visitors from Germany also went, followed by 235,000 from France. This is not surprising given that these are three of Britain’s largest inbound markets.

Top Markets by Percent
Looking at the proportion of visitors from each market who go to the performing arts, Brazilians are most likely to go (22%). Mexicans are also quite likely (16%), reflecting the aspirations we saw from these markets in the Nation Brands Index data.

Nations with native English speakers (or a very high level of English) also featured highly, with visitors from South Africa (19%), New Zealand (19%), Denmark (19%), the USA (19%), Australia (18%), and Canada (15%) all making the top ten.

The Nation Brands Index data showed that potential visitors from many Asian nations have an aspiration to see the UK’s performing arts. 16% of Singaporeans who visited the UK in 2006 managed to go.

Which demographic groups are most likely to visit the theatre, ballet, opera or a concert?

The above chart shows that female visitors are more likely to go to the performing arts than male visitors, but this can partly be explained by the fact that business travellers are more likely to be male than female. When looking only at Holiday visitors, 19% of females went to the performing arts compared to 16% of males, so the difference is not that great.
Britain’s gardens and parks are world famous. The English garden is a famous style garden that became popular in the early 18th century. This style grew in favour and soon spread to Europe. Today, British gardens are still highly regarded and it has been said that Britain’s mild climate provides the perfect environment to grow most types of plants.

Chelsea, Hampton Court and Tatton Park Flower Shows are regarded as some of the best flower shows in Britain, showcasing a wide variety of gardens and people from all around the world come to admire them.

As can be seen on the chart above, visiting gardens is regarded as the 6th best activity in Britain, but ranks slightly lower (11th) in terms of visitors’ claimed likelihood to undertake it if they were to visit Britain.

Britain’s gardens stand out as being particularly appealing to the Japanese and Egyptian markets but are highly regarded by the majority of nations. English-style gardens are extremely popular in Japan, with a number of Japanese travellers keen to visit them in their country of origin. There is respect for the fact that they are so different from Japanese gardens and that they are a key part of what is perceived to be the British way of life. The garden is an example of something key to both cultures: development according to well-established codes. British gardens therefore remain one of the most popular product themes in Japan. (Japan Qualitative research 2008)

Visiting gardens

Although the “English Garden” is something keen gardeners all over the world want to see, research tells us visitors often say “what a lovely surprise it is to find secret green spaces” in Britain, particularly in London where it is often unexpected. Britain’s green spaces also often provide a welcome contrast from the cities and places visitors have come from (i.e. Delhi, Mexico City, Shanghai.)

Appeal of Gardens to Potential Visitors of Different Age Groups and Genders

The chart below shows that gardens would be a high priority for older visitors if they were to visit Britain, especially for females. For females aged 55-64, visiting gardens would be fifth on their to-do-list (out of 32 activities), so gardens could be a fantastic way of pulling in the growing seniors demographic to Britain.

Norwegians find Britain’s gardens least appealing, whilst it would not be a top priority for potential visitors from Ireland or China if they were to visit the UK.
Pubs

Around the World: Appeal of Pubs to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Going to a pub

The chart above clearly shows that going to a pub in Britain is far more appealing to more mature markets than to markets that can be described as emerging.

For some nations, such as the Nordic countries, Switzerland, the Netherlands, France, and Ireland going to the pub is seen as one of the top priorities for a trip to Britain.

For other nations, such as Indonesia, Korea, Malaysia, Singapore, India, Egypt, and Turkey going to the pub is not seen to be one of Britain’s highlights (probably due to a mixture of cultural and religious views). Other activities are far more appealing.

British pubs ride high consistently on the list of positive perceptions about Britain. Research (2007) conducted into Britain’s “welcome” demonstrated that the traditional British pub has a key role to play in improving perceptions of welcome along with offering authentic eating and drinking experiences. It also found that pubs are enjoyed by all as a true “welcome” moment - a chance to feel part of an authentic British life and to join in - not just be a “tourist”. This echoes years of previous qualitative research across all markets and nationalities - the pub is a real leveler and an asset to the brand.

Appeal of Pubs to Potential Visitors of Different Age Groups and Genders
The chart below clearly shows that going to the pub is most appealing to 18-24 year old males (it would be their fourth highest priority on a trip to Britain), and least appealing to 55-64 year old females (20th out of 32 activities). In general, the pub was far more appealing to males than females, regardless of age.
Types of Pub Visitors

How many visitors…
According to the IPS, 13.2 million visitors from overseas (40%) went to the pub in 2007

Journey Purpose
Visiting the UK’s pubs was undertaken by:
- 46% of Holiday visitors
- 48% of VFR visitors
- 26% of Business visitors
- 33% of Miscellaneous visitors
- 43% of study visitors

Top Markets by Volume

Over 1.7 million visitors from the USA went to the pub in 2007, and over a million visitors from Ireland (1.3 million), Germany (1.3 million), and France (1.2 million) did likewise. This is not surprising given that these are Britain’s four largest inbound markets.

Top Markets by Percent

Exploring and sampling Britain’s many pubs is a huge attraction and looking at the proportion of visitors from each market who go to the pub, those from New Zealand (68%) and Australia (64%) are most likely to go. British pubs are so well renowned in these countries that they have recreated the “traditional British pub scene” there.

In fact, looking at the top ten it is clear that those countries with strong historical and cultural links with the UK are most likely to go to the pub, as are visitors from the Nordic countries.

In the Nation Brands Index research, going to a pub comes top of the list of activities the Danish say they would be likely to do on a trip to Britain. This is closely followed by trying local and regional food and drink, so Danes could be tempted to eat out before hitting a bar or nightclub (which they also rate highly). These findings are replicated in the European Youth research (2009).
Food and Drink

Around the World: Appeal of Local Food and Drink to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

The chart above clearly shows that whilst most potential visitors say they would give Britain’s local food and drink a try if they were to visit Britain, there are many activities that they rate Britain as being better for. Potential visitors from France, Belgium, Spain, and Portugal are somewhat less positive about Britain’s local cuisine (and less likely to give it a try) than visitors from elsewhere.

The chart below shows that the majority of potential visitors would be willing to give British local food and drink a try if they were to visit Britain. There is little difference in propensity between different age groups, although there is some suggestion that females aged over 45 would be slightly less enthusiastic.

![Chart showing the appeal of local food and drink to potential visitors from different countries and age groups.](chart.png)
Food and Drink

Food and drink are not only necessities in life but also a source of pleasure. In a holiday context they provide direct access to a local culture and can be a leveller because of the interaction with local people that is required.

Though most respondents in nearly all of VisitBritain’s research mention the poor food reputation Britain has, they nevertheless recognised and welcomed the inclusion of several food elements in the concepts, which are perceived as distinctively British. These are fish & chips, scones (described as crumpets by many Americans) and Indian/ethnic food. Indeed, many of those who had previously visited Britain said that their experience of food in Britain was better than the British food reputation.

Trying local foodstuffs is seen as a key reason to travel and many potential travellers are interested in trying different types of local food. In a VisitBritain online survey respondents from Singapore said they would even travel to different places within the UK to sample local fare and afternoon tea and fish and chips were the most popular things to try when visiting the Britain.

Street food scene is ubiquitous and always buzzing in parts of many societies especially in places like Asia. It is not only where you can find some of the best food, it is also a way of life. Take away the street food and you would strip away the soul of the city and for the visitor, it can be the highlight of any trip.

There is one phenomenon in recent years that, in one stroke, has given Britain a street food scene – the farmers market. The grand-daddy of this trend is none other than Borough Market. This once very ‘farmers market’ is now not so much a farmers market but gourmet food emporium.

Promoting regional food and produce is another hook which could be used to encourage visitors to explore destinations outside of London.

Drinks were perceived as another facet of the food reputation, and here Britain was felt to fare rather well. As well as the distinctive drinks themselves – from tea to beers and whisky – the sense of ritual (especially with tea-time) and local customs suggested a distinctive and vibrant way of life. This connected with another theme, that of the British pub. As we saw earlier pubs can be a real welcoming leveller and give tourists a chance to feel a part of an authentic British life and to join in. The potential downside of alcohol as an icon of Britain is the connection that can be made with drunks and hooliganism.
Again VisitBritain’s research shows that shared culture is deemed very important in many markets. For many Europe is a key part of their heritage and many associate it with their own heritage in general, not just their personal ancestry. A large part of Britain’s attraction comes from the perception it has looked after and nurtured its past – something some felt was missing from their own societies and cultures.

“They hold on to tradition. They take care of what they have. There are schools that are 500 years old! I want to see that kind of thing. Here a school of 30 years old is ripped down for a new one.” (US East Coast)

This quote suggests Britain is not deemed to be old fashioned in a negative way. Britain was felt to be more the prime example of a reflection of heritage and history in modern-day life (”living history”).

Focus groups in August 2005, reminded us that Americans feel much closer to the British than they do other European nationalities. The British are seen as a key part of US history, as close allies historically and recently. Cultural inter-relationships (eg movies, music) are acknowledged. There is a shared language and great appeal of the British accent. For some Britain is reminiscent of the US East Coast. Yet Americans also perceive key differences: aloofness, European arrogance, stiff upper lip, strange humour and some notable social differences: more freedom (nudity, tabloids, immigration).

Australians and New Zealanders often talk about Britain as the “motherland” (especially the older ones) and having close ancestry. Many Australians and New Zealanders are of recent British descent and many have close relatives in Britain. Their education systems involve the study of British history and there are continuing close ties - for example the Queen remains the Head of State in Australia. A shared language also helps.

“The ties that we have with England as a nation...being of English stock - you want to see it.”

However research conducted in 2007 (in Canada, Australia and New Zealand) found that although people felt very close emotionally to Britain many could find reasons not to visit and visit Europe instead. Britain is considered the gateway to Europe and also the big trip – to visit family / the old homeland. However a key issue to many is that British culture and Britain itself is too similar to their own countries (especially to New Zealanders). They are looking for a novel, exciting experience.

Due to historical ties to Britain and the large number of Indians living in Britain, provides a significant amount of VFR traffic. There is a feeling that there is a shared culture based upon built heritage and historical ties stemming back to the British Empire. There is a sense of emotional familiarity and comfort with Britain – many Indians have grown up seeing, reading and hearing about Britain – especially London. Visual reminders of Britain remain in India via legal and education systems, Empire era buildings and road names. However, there is a sense that Britain is associated with the past – heritage and history which includes India’s past and world history. Britain is not associated with the future or seen as exciting and there is a feeling that Britain resents Indian success via globalisation and outsourcing.

Older generations in countries such as Norway still feel a close connection to Britain since the good relations during the Second World War.

In Japan, shared “island culture” was mentioned as a way in which the countries are similar. Britain and Japan are perceived to have a plethora of features in common: they are island nations; there is a royal family in both countries; both cultures have a deeply ingrained respect for tradition and the people are quite similar in their reservedness and consideration for propriety.

Research shows that respondents feel that Britain represents the quintessence of Japan. Britain is what Japan could have been. Japan is changing but Britain is perceived to be ever the same. Britain is all about tradition and stability.

“You could always go back to it and you will find it the same”

Japan respects traditions and yet has an obsession with novelty and changes. The juxtaposition between Britain and Japan inevitably leads to the comparison between the culture built of stone and that of wood. Britain is built of stone and thus seen to be everlasting whilst Japan is built of wood which is temporary. While being a land of traditions, Japan is also a land of transient beauty (wabi-sabi), of fireworks and cherry blossoms where, in reality, nothing lasts long.
**Shared Histories (continued)**

**Around the World: Appeal of Researching Ancestry to Potential Visitors**

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Understandably, researching ancestry is not regarded as a priority for most visitors to Britain as it’s only relevant to some. The chart below shows that it is of most interest to potential visitors from New Zealand, Australia, the USA, Canada, and South Africa.

**Appeal of Researching Ancestry to Potential Visitors of Different Age Groups and Genders**

As researching ancestry in Britain is not applicable to the majority of visitors, it is no surprise to see that it does not feature as a priority for any of the demographic groups on the chart below. This does not mean that the activity is of little interest to those with personal historical connections to Britain of course.
How many visitors…
According to the IPS, 483,000 visitors from overseas (1.5%) researched ancestry in 2007.

Journey Purpose
Researching Ancestry in the UK was undertaken by:
• 2.2% of Holiday visitors
• 1.9% of VFR visitors
• 0.4% of Business visitors
• 0.6% of Miscellaneous visitors
• 2.3% of Study visitors

Top Markets by Volume

Over 100,000 visitors from the USA researched ancestry in 2007, almost twice the number from Australia (58,000). Canada, New Zealand, and Ireland also featured in the top ten, whilst visitors from some non-English speaking European countries (presumably with large numbers of British ex-pat families) also researched ancestry.

Adhoc research conducted by VisitBritain in 2007 amongst people from the US, Canada, Australia and South Africa found that researching ancestry is an emotional experience and discovering more about their family’s links with Britain gives them a feeling of ‘having come home’. Stories from family members and personal family documents are usually the starting point for the research. Archives and record offices are also widely used but the web-based resources are the most essential tools.

Researching ancestry was not, as a rule, their primary purpose for travelling to Britain, respondents often also came for a holiday or to visit friends and family. Finding out “where we came from” is seen as very important, along with seeing the actual regional area of ancestry.

Respondents expressed interest in future trips to the UK to research ancestry – indicating that it’s an ongoing process (and draw to the UK) not just one aspect of one visit. Most rated their experiences of researching ancestry in the UK as being “good” or “excellent”, and many described it as evoking a “strong feeling of coming home”.

Which demographic groups are most likely to research ancestry

The above chart shows that researching ancestry is most likely to be undertaken by the 65+ age group. In terms of genders, the above chart indicates that females are more likely to research ancestry in the UK than males, but when just looking at Holiday and VFR visitors there is little difference in the propensity of either gender to carry out the activity.
Football and the Premier League

Football is Britain's most popular sport and has been played in the country for centuries. Britain is also, of course, home to the world famous Barclays Premier League, arguably the best football league in the world, judging by its dominance of the latter stages of the Champions League in recent years.

Football is a key trigger for international visitors wanting to come to Britain, with 41% of all potential visitors wanting to attend a football game and 1.2 million people actually attending a football game in 2007.

In 2008 VisitBritain formed a partnership with the Premier League, to promote Britain as the home of football globally and to position Britain as a welcoming destination for football fans from around the world. Premier League is the most watched league in the world with a cumulative audience of approx 82 million per week.

Britain the Home of Football

Kicking a ball with the feet has been going on for 1000's of years, but the creation of football as we understand it today has its roots in Britain, and in particular the true development of football came in Medieval Britain. Games were in fact held between neighbouring towns and villages with no limit on the number of players and practically no rule book, but matches often resulted in major disputes and riots. Indeed, so violent was medieval football that the Lord Mayor of London actually banned the sport in 1314, claiming 'there is great noise in the city caused by hustling over large footballs in the fields of the public'.

The decisive moment was October 26th 1863 when a meeting took place with all clubs in existence in England (at the Freemason's Tavern in London's Great Queen Street), and then the Football Association was founded. Shortly afterwards the official code of practice was drawn up and several football clubs were founded.

The rise of club football made international football an obvious idea and the first international match was played between England and Scotland in Partick in November 1872, ending in a disappointing 0-0.

The rise of football internationally

The popularity of football on the continent was well established by the 19th century and European and worldwide developments were heavily influenced by England. For example, the first recorded game outside of Europe took place in Argentina in 1867 and involved English workers in influence by England. For example, the first recorded game outside of 1867 and involved English workers in the country.

It is for reasons like these that football can arguably be considered the greatest export in Britain's long history. Britain has had an incredible influence on the development of modern football, laying down the original regulations, establishing the basic competitions and spreading the game quite literally worldwide. It is this foundation which the true development of football came in Medieval Britain.

The competition formed as the FA Premier League in 1992 following the decision of clubs in the Football League First Division to break away from The Football League and take advantage of a lucrative television rights deal. The Premier League has since become the world's most watched sporting league and is the world's most lucrative football league, with combined club revenues of £1.93 billion.

Promoted as "The Greatest Show On Earth", the Premier League is the world’s most popular and most watched sporting league, followed worldwide by over half a billion people in 202 countries.

The Premier League is particularly popular in Asia, where it is the most widely distributed sports programme. For example, in China, matches attract television audiences between 100 million and 360 million, more than any other foreign sport. Due to this popularity, the league has held three pre-season tournaments in Asia, the only Premier League affiliated tournaments ever to have been held outside England.

At the inception of the Premier League in 1992–93, just eleven players named in the starting line-ups for the first round of matches were ‘foreign’ (players hailing from outside of the United Kingdom or Republic of Ireland). Now, over 260 foreign players compete in the league.

Footballers From Around the World

The map below (from the BBC) shows where Premier League footballers (2009-2010 season) were born. It is easy to see that many countries are represented, and there is often a great deal of interest in following players' fortunes in the English Premier League. For example, the many ups and downs of Carlos Tevez (at Manchester City at the time of writing) are keenly followed in Argentina. But it’s not just the idea of following local heroes plying their trade abroad; viewers tune into the Premier League to see the talents of a multitude of international (and British) stars such as Didier Drogba, Wayne Rooney, Francesc Fabregas, Fernando Torres, Steven Gerrard, and Frank Lampard.

On average, Premier League Teams have 13 foreign players each but some are almost entirely made of players from overseas. Anfield is home to 20 foreign-born players with a strong first-team claim, while Arsenal can boast 23, as opposed to four Brits, all aged under 21.

Fans Around the World

Football is the World’s most popular sport and several billion viewers watch the Barclays Premier League each Season. Research conducted by independent research agency Populus on behalf of the Premier League among sports fans in China, Hong Kong, Indonesia, South Korea, Thailand and the US found that the Barclays Premier League was seen as the best foreign football league overall by fans in all countries. It was seen as having the best players, the best fans, as being the most competitive and the most skilful.

Across all countries surveyed a quarter of sports fans or more watched or listened to live broadcasts of Barclays Premier League matches. In all markets more sports fans said they supported a Premier League Club than said the same for any other foreign football league which is testament to the quality of the football on show and the amount of coverage broadcast each week around the world.

Those fans who regularly attend live Barclays Premier League matches believe the most important elements are the quality of the football, seeing their team live and the passion of the crowd.
Around the World: Appeal of Watching Football to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

On average, watching football is rated as Britain’s 13th best activity by potential visitors. However, visitors from many countries see it as one of the best activities to do in Britain.

It is rated as the best activity by the Irish, Norwegians, Swedes, Danes, Singaporeans, and Malaysians, and it’s rated very highly by Koreans, Indonesians, Czechs, and Estonians.

The appeal of the Premier League (particularly in the Nordic and Asian countries) is well documented and this really comes through in the above chart. Despite being highly rated by many nations, watching football falls lower on the list when it comes to likelihood to participate; however this can largely be explained by its appeal to men more than women. Aspiration to watch a football match is highest in Asian nations, where many opportunities to experience top-class football matches in the flesh can be limited.

The English Premier League is extensively followed in Singapore and live coverage is available on a range of TV channels. Attending a football match can often be a catalyst to travel to Britain. Malaysians are also keen followers of British sports and may plan a trip to Britain to see a British football team play. Online research (2005) showed that 13% of respondents were extremely likely to visit a sporting event on a trip to Britain (although only 4% did so in 2006 - IPS). Britain is strongly associated with the English Premier League, which is the most popular football league in Malaysia and has huge followings especially Man United, Arsenal, Chelsea and Liverpool.

Appeal of Watching Football to Potential Visitors of Different Age Groups and Genders

As might be expected, watching football matches polarises opinion. Amongst the majority of females of all ages, going to a football match would be very low on their priority list if they were to visit Britain. Amongst males, a different story emerges. 18-24 year olds regard it as a top priority, and it is also very appealing for 25-34 year olds. It is less appealing to the 35+ age group, but still of interest to a many.
How many visitors…
According to the IPS, 1.2 million visitors from overseas (3.7%) went to a football match in 2007.

Journey Purpose
Going to a football match in the UK was undertaken by:
- 3.0% of Holiday visitors
- 3.4% of VFR visitors
- 0.9% of Business visitors
- 15.6% of Miscellaneous visitors
- 7.7% of Study visitors

3% of Holiday visits included watching a football match, compared to over 15% of Miscellaneous visits. Where visits were recorded as Miscellaneous and a football match was included, we can surmise that the football match was the main motivation for visiting the UK.

Top Markets by Volume
Ireland stands out as the market providing the highest number of visitors watching football in the UK. Over 250,000 visits from Ireland included a football match, with North West England often on the itinerary. 95,000 visits from the USA included watching football, as did 88,000 from Germany and 86,000 from Norway.

Of these nations, Ireland, the USA, and Germany provide around 3 million visits to the UK each year, while Norway provides well under 1 million, so it punches well above its weight when it comes to visitors going to football.

Top Markets by Percent
Looking at the proportion of visitors from each market who go to football matches, visitors from Norway have the highest propensity (14%), often going to matches in the North East of England. Ireland is second on the list with 9% of Irish visits including a football match.

With a keen interest in English football, Thailand and Malaysia represent South East Asia in the top ten, with 9% and 6% of visitors respectively managing to watch a match when in the UK.

Sweden, Finland, and Denmark also make the top 10, not surprising given the Premier League’s appeal in Nordic markets.

Which demographic groups are most likely to go to a Football Match?

The above chart clearly shows that male visitors are much more likely than females to go to a football match when in the UK. 9% of male 16-24 year old visitors went to a football match in 2007. Although it would appear from the above chart that the proportion of visitors going to football declines with age, this effect is exaggerated by the higher proportion of Business visitors amongst 25-44 year olds. When business visitors are excluded, male 25-44 year olds are almost as likely to go to football as male 16-24 year olds.
Watching Sport

Around the World: Appeal of Watching Sport to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Watching other sporting events e.g. tennis, rugby matches, horseracing

The chart above clearly shows that watching other sports in Britain (e.g. tennis, rugby, horseracing), is reasonably highly regarded as an activity, but it’s not a priority for the majority of potential visitors. Countries that indicated they would be somewhat likely to watch other sports if they came to Britain include Australia, New Zealand, South Africa, Italy, Ireland, and India. Clearly these nations share a keen interest in rugby, cricket, or both.

Britons love sport, both playing it and watching it, but what is perhaps less well known is that some overseas visitors love coming to Britain to watch all manner of sports, be this golf, rugby, tennis, cricket or athletics. Britain is also the birthplace of many sports (football, tennis, horse-riding, rugby) which again 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 amateur sport, ranging from a round of golf on a Scottish links to getting covered in mud during the Three Peaks Challenge.

Those visitors who play amateur sport in Britain no doubt have a memorable time, and while not all inbound sports spectators can be guaranteed to see their chosen team go home with a victory under their belts the spectacle of watching sport at an iconic venue such as Lord’s, Old Trafford or St Andrews will doubtless have gone some way to soften the pain.

The International Passenger Survey tells us that nearly two million visitors watched sport in Britain in 2008, spending more than £1.3bn in the process. Meanwhile 1.4 million visitors played some form of amateur sport, contributing £1.3bn in spending.

Some visitors both watched and played sport, but overall we can deduce from the figures that in some shape or form ‘sport’ helped attract more than 3 million visitors to Britain in 2008, nearly one-in-ten of all visitors, with the economy benefiting to the tune of £2.3bn as a consequence, that’s about 14% of total inbound visitor spending in 2008.

The most important market for watching sport in Britain, by a factor of two, is the Irish Republic, with nearly 400,000 visitors opting to do so. Nearly seven in every ten visitors from Ireland who watched sport during their visit said that this was the main purpose for their trip. Other markets where watching sport was regularly cited as being a primary motivator include four Northern European markets; Sweden, Norway, Finland and Denmark.
Watching Sport

New Zealanders, Australians and South Africans are passionate about sport and all the major sporting events held in Britain are shown in these countries. Watching sporting events (especially football, rugby and cricket) are important motivators to visit. Although watching sports is sometimes a primary motivator to visit Britain, but this is more often the case for particular individuals rather than everybody, so marketing should be highly targeted to these groups where possible.

Rugby is an interesting association in Argentina. In Argentina rugby is relatively more popular with this educated, well-off upper middle class target and rugby is more accessible than it is in Britain. A number of top Argentinians playing in Britain/have played here which could possibly be exploited.

The Indian middle classes, especially men, are sports mad. Cricket dominates. Other sports such as tennis, racing, football and golf offer marketing and PR opportunities. Cricket, like hockey, was brought to the Indian sub-continent by the British. There are references to cricket having been played in India in the early parts of the 18th century. By the beginning of the 19th century the game was being played in the cities of Bombay, Calcutta and Madras. According to the Guardian Unlimited, “when Tendulkar bats against Pakistan, the TV audience in India exceeds the entire population of Europe”. If ever proof were needed of the immense appeal of cricket to India and an important link with Britain. India joined the modern Commonwealth (a voluntary association of 53 nations) following independence in 1947. This membership will continue to strengthen ties between Britain and India in the modern world. The Commonwealth Games in Delhi in 2010 can be linked through a public diplomacy campaign to build up fever for the London Olympics in 2012.

There is also a strong interest for niche products such as golf. For example golf is in its infancy in Russia - Moscow’s first golf course was built in the 1990s and there are less than 3,000 Russians who regularly play – but interest is growing rapidly among the wealthy.

Similarly, 4% of Danes are regular golfers and the number of golfers in Denmark is constantly increasing and has been every year since 1949. (Source: Dansk Golf Union–The Danish Golf Association)

India was the first country outside Great Britain to take up the game of golf. What makes golfing in India exciting is the diversity of its courses. India was the first country outside Great Britain to take up the game of golf. What makes golfing in India exciting is the diversity of its courses. Not only does it have the oldest gold club in the world outside Great Britain, but also the highest, at Gulmarg (altitude 2,700 metres) in Jammu and Kashmir. Golfing in India has come a long way, and a large number of Indian players now compete on the international circuit. Ryder Cup in Wales, London 2012 Olympic and Paralympic Games, 2014 Commonwealth Games (in Glasgow) Britain is in a uniquely strong position to further develop the role that watching and playing sport fulfils in building the value of inbound tourism to Britain.

For more information about participating in or watching sport while in Britain please read click here.

Seasonality
IPS statistics show us that watching sport in Britain is a pastime for all seasons and for visitors stating that it was the main reason for their trip the winter months are particularly important, providing a strong hint that the bulk of spectating is at football or rugby matches.

Playing sport while in Britain is rather more seasonal in nature with the most popular time of year being July to September (accounting for 35% of such trips). Among visitors for whom playing sport was a primary motivator we can see that the period April to June was marginally more important than the period July to September.

The 2012 Opportunity
A study undertaken on behalf of VisitBritain and Visit London by Oxford Economics estimated that the potential tourism legacy of the 2012 Olympic and Paralympic Games (that’s looking at the years before and after the Games as well as 2012 itself) stood at £2.1bn. Indeed, if lessons were learned from previous mega sporting events and appropriate measures adopted this tourism legacy could be closer to £2.9bn.

These benefits will accrue not just thanks to visitors who come to watch the Games in 2012 but, thanks too to the Cultural Olympiad, related business events and by leveraging the unprecedented amount of global media (press and broadcast) coverage about London and Britain that will occur throughout 2012.

VisitBritain will be using the 2012 Games to promote the wider messages and interests of destination Britain. Our 2012 Games programmes will centre around three core objectives:

- To deliver and showcase a world class welcome in 2012 and beyond
- To enhance the image of Britain
- To maximise the economic benefits for tourism across the UK

While sport is the catalyst, it is clear that the 2012 Games provides a unique opportunity to put Britain’s tourism offer centre stage around the world, but equally clear is the fact that to secure the legacy on offer partnerships will need to be forged, with public diplomacy partners, Games sponsors, the media, British tourism businesses and of course frontline staff across the tourism sector.
Qualitatively, we often find the image of Britain is influenced by the ones depicted in books. This is especially the case in countries where people are relatively new to the travel scene, for example (China, Korea etc). In markets where consumers are less familiar with Britain, Britain is thought to be as depicted in detective novels (eg foggy weather, men with beards and walking sticks). These are often reinforced by the Britain that people from these countries learn about at school. Clearly, these images are likely to be based on Britain during the Industrial Revolution and Colonial Britain.

Most prospective tourists who are less familiar with Britain perceive Britain as an old-fashioned and conservative country. Britain is associated with the bowler hat, rainy London, and Dickensian images. Interestingly, few of these people will change their perception even after a sightseeing trip to Britain, as these trips only embrace Britain’s traditional sights.

Current British cultural trends that have attracted Japanese attention include the Harry Potter books, Beatrix Potter and Winnie the Pooh. The Japanese have an appetite for British books and stories including characters and films. Britain is often associated as being a country of films. Interest in Harry Potter may have, oddly enough, connected the Japanese with Shakespeare. Although few Japanese have studied any Shakespeare texts, many respondents were keen to speak of their desire to visit his birthplace. Aware of Shakespeare’s significance in the English-speaking world, Japanese are keen when visiting Britain to feel that they have not missed out on something so significant, even if their understanding may be limited.

Unfortunately limited updates on Britain (from some contemporary films eg Love Actually, Notting Hill and Harry Potter) seems to be getting through to consumers and more effort needs to be made to challenge these old fashioned stereotypes.

Although research shows respondents that had read books and seen films that were set in Britain, and are keen to see ‘the real places’, we need to be careful. Literature can give consumers an idea of Britain and its culture but it is rarely a strong enough driver to motivate an actual visit.
Education

As we saw in the trends section in Chapter 1, for many cultures travelling is a way of self-improvement, learning about different cultures and increased knowledge of another country. In the Nation Brands Index, the UK is consistently seen as one of the best nations in the world for study. Qualifications from British universities hold high prestige, as does the concept of Britain as the home of the English language and the home country of the famous writer Shakespeare. Interest in centres of learning (eg Oxford) also extends into an appreciation of British culture – and particularly the “English Gent”. (China)

“I’d like to enjoy the thick atmosphere for Study in Oxford and Cambridge.”

In certain countries we also find a certain snob value attached to some British products and services. For example, in Spain the educational system is held in high regard by the cultural elite, whose children are often sent to study in Britain, or at least to English-speaking schools in Spain. In a similar vein, children of wealthy parents in Russia are coming to Britain on language courses, preparatory courses and long-term education and high quality expensive and prestigious schools are becoming increasingly popular. In many cases a member of a family escorts the child to school and stays for a while in a town nearby, staying in a hotel, visiting museums and shopping.

Research carried out by the British Council in Mexico reveals that the UK is seen as an increasingly attractive market for tertiary and English language education. This reflects the growing difficulty in the USA and Canada for entry for Mexican nationals. Canada used to be viewed as an education destination but its new visa requirements for Mexicans has made it less favourable. However for many other markets Canada is still considered to be an excellent competitor to the UK as a potential study destination.

Britain is an important study destination, however, although foreign nationals study a wide variety of courses here in Britain a large proportion of people that have studied in the UK had studied a language course. (This is discussed in more depth in the next section - Learning English.)

Research conducted by MORI 2004 into international students’ perceptions of London found that those who had visited London previously were likely to be those who had considered London as a place to study. London was also felt to be felt up-to-date and modern and offer easy access to Europe. However, on the less positive side, Londoners were perceived as being reserved and unfriendly. London is seen as expensive, having poor weather and offering limited nightlife.

The International Passenger Survey informs us that Britain’s main study markets are typically France, Italy, Spain, Germany, the US and Russia. In recent years there has been a steady decline in the number of inbound study visits. However, those coming to Britain on study visits stay a long time relative to all other journey purposes, the typical figure for recent years has been close to six weeks.

A syndicated study conducted by Hobsons in 2007 shows that the main reasons foreign students come to study in Britain are its excellent academic reputation and that people feel that it will improve their career prospects back in their home country. Conversely, barriers preventing students from coming to Britain to study revolve around the high cost of living, the cost of fees and where applicable, visas.

Although a fair proportion come to Britain to study traditional subjects such as business studies, engineering, accountancy etc, Britain is creating a name for itself as a good international destination to study creative courses such as fashion design, jewellery, art and so on. Part of this can be attributed to Britain’s or London’s reputation for being a world leader in these industries.

Research conducted by VisitBritain in the UAE in 2007 amongst Arab youths talks about the paradigm shift of women’s roles from traditional careers in the UAE such as teachers to a growing interest in the creative industries. Britain is seen to be a key destination to study these types of subjects.

‘UK has one of the best education systems - we all know this’, UAE

The study market also presents opportunities in unexpected ways. For example in some Asian countries the mother will often move overseas to support their children’s studying abroad while the fathers at home to work and send money to support them. Because these families are only able to come together once a year, mostly during summer holidays, they are called “wild geese families.”
Learning English

Around the World: Appeal of Learning English to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Learning English on a course

English continues to be the essential language to learn. British English has a certain snob value over its competitors – the USA, Canada and Australia – and as a result Britain is well respected for English language education provision. Learning English in Britain is highly regarded as an activity in countries where English is not so widely spoken. Turks regard it as the best activity on offer in the UK, and they say it would be 6th on their list of priorities if they were to visit Britain. Learning English is also highly regarded by Egyptians, Eastern Europeans, Swiss, Italians, Spaniards, Latin Americans, and many Asian nations such as China, Indonesia, Korea, and Malaysia.

The Polish language and education market is growing, with Britain as the most popular destination for learning English. Qualitative research carried out in March 2006 showed that the current trend of Poles working in the UK is generating lots of word of mouth about Britain and lots of media interest in Poland – even extending to reality TV shows about Poles working in Britain or learning English there! Many young and upper-middle income Polish tourists routinely take a summer vacation during July and August to advance their English skills.

In the Nation Brand Index research, 72% said they would be very likely to learn English on a course if they were to visit Britain, and Poland consistently ranks the UK as the best nation to study for educational qualifications.

The study and school trips market produces a potentially lucrative segment of visitors to Britain from France each year, with the average study trip worth five times that of a holiday visit. The study market, or English Language Training, represented 2.3% of total French visits to Britain in 2005 (IPS).
Learning English (continued)

**Appeal of Learning English on a Course for Potential Visitors of Different Age Groups and Genders**

The chart below shows that, for the majority of potential visitors, learning English on a course would be a fairly low priority if they were to visit Britain. There is a slightly higher level of interest amongst 25-44 year old males (presumably for business reasons) and females over 35.

---

**Who actually studies English as a Foreign Language in the UK?**

In 2005 VisitBritain sponsored a question on the International Passenger Survey to understand more about visitors who study English whilst in the UK for less than a year.

461,000 visitors did so in 2005, representing 1.5% of all visitors. Of these, 75,000 were residents of France, 59,000 from Italy, 50,000 from Germany, and 48,000 from Spain.

Amongst less familiar markets, Austria (24,000), Poland (23,000), Switzerland (20,000), Japan (18,000), and Russia (10,000) were the largest source markets.

131,000 were under 16 and 211,000 were 16-24, so youths are by far the most likely to be studying English on a course in the UK.

---

Many Japanese students have three years of English language study during middle school and many of these go on to be good or even fluent English conversationalists. Additionally, when the Japanese finish their working careers, they are also interested in learning foreign languages to enhance their travel experiences. However, the Nation Brands Index research does not show the Japanese as a whole to be overly interested in learning English on a course if they visited Britain, so targeting those interested is necessary.

Learning English whilst in Britain is highly regarded by the Chinese. It is perceived that having an internationally recognised qualification will increase status and help Chinese citizens find a higher paid job in China. Britain is strongly perceived as being the home of the two most famous universities, Cambridge and Oxford, and there is almost a pilgrimage facet to the experience sought.

Education related travel can also extend to summer or winter ‘holiday camps’ where students will typically be aged 15-22 taking two or three weeks at a language school and there will be a touring/sightseeing programme tagged on at the end. The itinerary usually covers London, part of England and Scotland and, of course, Oxford and Cambridge are ‘must sees’. This group also includes some VFR travel; those aged 16–60, who are friends and relatives visiting students at school and families attending graduation ceremonies.

The majority of this group will be first timers so sightseeing will play an important part. With 32,000 Chinese students studying in the UK at any one time, it is no surprise to see the VFR market growing steadily.

The British Council in Hong Kong taught 43,000 students at their Hong Kong centres in 2006 - the largest teaching centre for BC in the world. Over 3,000-5,000 students went on a summer English Language course to Britain last year, sent by around 15 agencies offering 98 packages. Students are often joined by their families for a holiday in Britain or in Europe afterwards. Major competitors for the summer camp market are Australia, USA, Canada, NZ, China and Japan.
Britain’s royal heritage plays a crucial role in what makes Britain an enticing destination for many visitors from overseas, both through the built heritage legacy of monarchy that manifests itself through castles and palaces that can be found across the country and through the many legends and stories associated with royalty, be this King Alfred burning the cakes, Richard III’s alleged plea ‘A horse! A horse! My kingdom for a horse’, Henry VIII’s marital complications, or Queen Victoria’s fondness for the Isle of Wight. If any single fact can convey the global awareness of Britain’s monarchy it is a BBC estimate that a worldwide television audience of 2.5 billion watched the funeral of Diana, Princess of Wales on 6th September 1997.

In 2008 nearly five million experienced one of the properties overseen by either Historic Royal Palaces or the Royal Collection. Add to this other statistics such as 1.1 million visits to Edinburgh Castle and the importance to tourism of places with royal association becomes plain to see. (IPS)

English Royalty is linked to Britain’s strong tradition and heritage image and research across all VisitBritain’s markets has demonstrated that ‘royalty’ and ‘the Queen’ are key associations that people have with Britain. Research carried out in 2003 (in France, Australia, Germany, Japan and the USA) showed that for many the desire to visit Britain has been present for a long time and is strongly influenced by the history and traditions associated with the country, in particular the royal family: “somewhere we had always wanted to go… it was about the history… the kings and queens and the bridges.”

The same research highlighted the key tourist icons that attract people to Britain are often connected to the Royal Family, such as Buckingham Palace (which respondents feel makes the Royal Family come alive for them when they visit), the Tower of London (to see the crown jewels) and Westminster Abbey (where respondents felt they could appreciate the connection between the church and the monarchy).

Our potential visitors are particularly impressed that Britain’s traditions and history are still alive and visible today, “they still have a Queen!” (Hungary). Although some visitors have high expectations of the Royal Family, as research carried out with staff at the Britain and London Visitor Centre (BLVC) highlighted, there are quite a number of visitors from abroad who thought they would be able to have tea with the Queen!

Project Lion branding research carried out in 2002 (China, France, Germany, Japan, Netherlands, Poland, Sweden and the USA), showed that many respondents struggled to envisage ‘ordinary’ or everyday people and life in England. Mention was often made of the pinstriped businessman or members of the Royal Family as embodiments of the English personality! For Japanese people Britain evokes notions of the Royal Family, that in turn makes them think of a deep-rooted history, class and a sense of ‘doing things properly’.

Research in VisitBritain’s emerging markets has also demonstrated powerful connections in respondents’ minds between Britain and our royal heritage. The Queen, royal guards, the Royal Family, were all spontaneous associations that came to mind when the respondents thought of England as well as our great historical icons and traditions such as taking tea. One respondent commented “London and the Queen – like the Pope in Rome”.

Over recent years the Royal Family has demonstrated a clear enthusiasm for supporting UK tourism. Back in 2003 the first Royal Tourism Day involved The Queen and The Duke of Edinburgh visiting Legoland; in total ten members of the Royal Family visited tourist attractions across Britain. In 2007 His Royal Highness the Prince of Wales agreed to be patron of the very first British Tourism Week which involved much more than pure symbolism, with his hosting a reception at the Tower of London and visiting the National Botanic Garden in Wales.

More recently in June 2009 the Royal Family supported a Global Media Tour organised by VisitBritain that involved hosting 70 of the world’s most influential travel writers and broadcasters from 31 countries on itineraries across the nations and regions of Britain. The tour commenced with a reception at Buckingham Palace hosted by His Royal Highness The Duke of Edinburgh on the occasion of his 88th birthday. During her reign Her Majesty The Queen has travelled overseas more than any other Sovereign in history, with more than 325 trips abroad since 1952, including over 60 State visits to foreign governments. Visits have not only been to Commonwealth nations such as Canada and India, but to other countries such as China in 1986, Russia in 1994 and the USA in 2007. The Queen and The Duke of Edinburgh made an overseas visit at the end of November 2009, this time to Bermuda and Trinidad and Tobago.

In addition to outbound visits The Queen has hosted dozens of State visits here in Britain, including a recent visit from the President of Mexico in March 2009.
Monarchy (continued)

Around the World: Appeal of Visiting Places associated with the Royal Family to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Visiting places associated with the Royal family/ Monarchy

Visiting places associated with the Royal Family/Monarchy is regarded as one of the best activities to do in Britain (ranked 3rd). There is some variation in how the activity is perceived by different nations. On balance, it is of more interest to emerging markets than developed ones.

The chart above clearly shows that the activity is seen as a must-do for potential visitors from Asia, Latin America, and Eastern Europe.

Respondents from long-haul markets with strong historic and cultural links with the UK (the USA, Canada, Australia, New Zealand, and South Africa) rate visiting Royal locations as one of the best activities on offer in Britain, but it falls down the pecking order slightly when looking at which activities respondents say they would undertake if they came to Britain.

Nations that hold their own royal families and history in high esteem and are subsequently curious about the British Royal Family. For many of our Asian visitors royalty and aristocracy is a key driver to Britain and they expressed an interest in experiencing life in palaces and that they would like to follow in the footsteps of royals and so on. Research conducted in China showed that the Chinese have a mutual respect for Britain’s “1000 year old history” as they see it as a kinship between China and Britain. Royalty and aristocracy are big draws and the Chinese express an interest in experiencing life in palaces and castles, following in the footsteps of royalty, etc.

Similarly, members of the British Royal Family receive high exposure in Japan, and this has cemented awareness of Britain as a monarchy. Royal families are intrinsically associated with tradition and history. The Nordics find Royal locations less appealing than other nations.

Appeal of Visiting Royal Locations for Potential Visitors of Different Age Groups and Genders
The chart below shows that visiting locations associated with the Royal Family/Monarchy are appealing to males and females of all ages, although the activity would be a slightly higher priority for younger females than older ones. It is sixth on the list for 18-24 year old females, and eleventh on the list for 55-64 year old females. Amongst males, there is no clear pattern relating to age.
Monarchy (continued)

Monarchy may not be on the wish-list of each and every leisure visitor to Britain, but there is little doubt that for many Buckingham Palace is a ‘must see’. 54% of international online respondents agreed they ‘always wanted to see Buckingham Palace’, whilst just 22% disagreed (NBI 2007).

However, Britain’s monarchic heritage plays itself out in many other ways and in just about every corner of the country from Scotland to Cornwall. Looking to the future it is now only a couple of years before Her Majesty The Queen celebrates her Diamond Jubilee, a feat last accomplished back in 1897 by Queen Victoria.

VisiBritain ran a question in 2007 which gave respondents a list of 15 British icons to choose from including The London Eye, Tea and Red Phone Boxes. Unsurprisingly, the icon picked by the most respondents was a red double decked bus (24%) however, for 11% of respondents, Queen Elizabeth II was the iconic image that they selected, representing the third most popular choice, well ahead of ‘fish and chips’ or ‘draught beer’.

Respondents from some countries were far more likely to choose The Queen as their iconic image than others. Roughly one-fifth of respondents in Russia, China and India plumped for The Queen as the iconic image for their imaginary post-card, whereas very few respondents did so in countries such as Spain or Argentina.

Looking at the results in a different way we find that more respondents in China and India selected The Queen than any other iconic image. Out of the fifteen images the furthest down the league table that The Queen came was 8th, among respondents in Norway. (More on Britain’s iconic images is discussed in Chapter 2 - Built Heritage)
**Britain's Historical Cultural Impact**

The British Empire has had a huge amount of influence on world culture, the English language being the main contribution. If it is not the first language of a country it is usually the second. It has been said that in time English could become the world language.

As well as the British influence on its empire, the empire also influenced British culture and British cuisine. The Industrial Revolution also brought about major changes in agriculture, manufacturing, and transportation which had a profound effect on the socio-economic and cultural conditions of the world.

“British popular culture in the form of Britpop, British television, British cinema, British literature and British poetry is generally revered across the world.” (Wikipedia)

Many visitors have an interest in British icons and symbols they have seen or heard so much about such as British music (eg the Beatles), British brands (eg Burberry, Vivienne Westwood, Harrods) and British celebrities (eg the Beckhams). Also countries that felt they have missed out on modern culture such as the “swinging sixties” show a thirst for it. For example Spaniards love live music (particularly modern British) and would be interested in going to live music events in Britain. Also, many of Britain’s most modern and dynamic buildings of the late 20th and early 21st century had Spanish architects – in addition, many of Spain’s most modern buildings were designed by British architects. Interestingly, the trend towards British ‘country’ lifestyle and fashion (Barbour jackets, knitwear etc.) and television programmes like Mr Bean and Rosamunde Pilcher films have greatly helped to improve Britain’s image in Germany. Britain is considered to be a stylish destination with a stunning landscape and a rich culture. British humour and eccentricity have increasingly positive connotations. The British are no longer considered to be odd (in a negative sense) but more approachable and endearing.

**Cultural Events**

Cultural events are an extremely important part of Britain’s cultural heritage and range from celebrating Chinese New Year to St George’s Day, the National Eisteddfod in Wales and St Andrews Day to Chanukah. The Mayor of London is openly committed to ensuring that London continues to build on its international reputation for hosting world-class events and festivals.

Although fixed attractions are more important than events in terms of city visits, events and festivals are effective tools in attracting first time and repeat visitors alike. Often because events are unique and take place in a limited timeframe, they form an extra reason for cultural tourists to visit a place. Festivals tend to better attended by local residents and domestic tourists, rather than overseas visitors. However this is likely to be attributed to booking and information problems posed for foreign visitors. Although American tourists are known to attend a large number of arts events particularly in the UK.

There also seems to be a shift away from purely heritage based tourism towards something that includes heritage plus culture, or heritage plus culture and creativity. This is most clearly illustrated in the success of cultural events across Europe, which are increasingly based on creative rather than heritage assets.

Swedes in particular have a high opinion of Britain for its culture and want to travel to Britain for the cultural experience in the broadest sense. The Swedes rate Britain highly for having lots of cultural events and attractions and they also place great emphasis on the friendliness of the British people. Swedes view the experience as very important – many want to engage in cultural activities such as attending a live performance of a play or musical.

According to the NBI “lots of cultural events and attractions” is rated in the top 5 Britain brand value attributes. Overall, Britain’s “cultural” products are not driving visitor satisfaction and retention as much as the “history and heritage” aspects. However, there are many niche marketing opportunities which the Moments of Truth research highlights:

- Museums & Galleries particularly motivate older, post-family visitors
- Classical Performing Arts are motivators for 45-54
- Popular Performing Arts are motivators for 18-34 & families
- Live Contemporary Music appeals to 18-34 & pre-family visitors

The Visitor Satisfaction research (2008) also shows that Britain performs above average in terms of the availability of cultural events, music and festivals and this should be also used as an opportunity to attract new and existing customers.
What is a Cultural Olympiad?
A Cultural Olympiad is a four year period leading up to an Olympic Games which includes a variety of cultural events coordinated by the Organising Committee of the Olympic and Paralympic Games.

The Olympic Games are used as a catalyst to develop the host country’s cultural offering and provide a key opportunity to showcase the city’s culture to the world. Broad objectives for the Cultural Olympiad include: welcoming the world, inspiring and involving young people and generating a positive legacy.

Past Cultural Olympiads show that successful events are well-organised and celebrate different aspects of culture.

The Beijing Approach

• Beijing followed a model established by Barcelona in 1992 and proposed a multi-annual cultural programme, but instead of starting after the Athens Games, it launched its first ‘Olympic Cultural Festival’ in 2003 during the Athens Olympiad. It held 6 Olympic Cultural Festivals, each lasting one month, and used the Cultural Olympiad to promote the Games at large, rather than a separate programme of arts activity.
• Beijing tried, for the first time of any Games, to incorporate all ‘cultural aspects’ of the Games under the umbrella of its official cultural programme. As such, beyond arts, design and mainstream Olympic promotions, it also incorporated the increasingly popular Olympic Cultural Squares under the name of ‘Live Sites’ and as a separate entity to its arts festival. Beijing had 24 sites which, not only included large TV screens showcasing live sport competitions, but also cultural exhibitions and larger-than-life sponsor displays.

Assessing the opportunity for the Cultural Olympiad

The city is the main focus of the Cultural Olympiad. Over a third of visitors to the Olympics also visit cultural venues, with art the biggest draw.

The Cultural Olympiad served as the foundation for cultural tourism in Barcelona. The urban transformation, the creation and improvement of the artistic, historical and cultural infrastructure of the city facilitated the promotion of Barcelona as a cultural destination. However, 37% of the respondents did attend cultural venues as well as big sporting events during Games time. On average those that were interested in culture saw 2.2 events, with art exhibitions far out-stripping other events. Topics related to sport ranked second. Events that took place outside Athens attracted, in most of the cases, local audiences. Any overseas visitors only reflected existing visitor levels. Visitors to Beijing had difficulties finding the Live Sites and obtaining the free entry tickets required. For this reason, many Live Sites were not used to their capacity and the opportunity for showcasing different areas of the city were not realised.

Well known tourist attractions in the city, not designated Live Sites, were

London’s Aims for the Cultural Olympiad

There is a huge opportunity for London to celebrate and showcase its depth and range of culture to the rest of the world and the Cultural Olympiad is an ideal vehicle for doing this. A strong cultural offer greatly enhances the richness of the experience for all visitors and is likely to lead to repeat business and recommendations. London is different to all the other cities that have been researched as it is already the cultural capital of the world, attracts high volumes of tourists and appeals to a broad age range.

However, the aims of the Cultural Olympiad for London are:
• Raise the profile of London as a cultural destination
• Improve communications with and between tourism and cultural stakeholders
• Develop and supporting new partnerships
• Effective programme development and planning
• Promote the cultural offer to potential visitors

Challenges and opportunities include:
• To gain worldwide coverage for cultural elements while the spotlight is on the destination in the run up to, and during, the Olympics and Paralympics.
• Challenge domestic and overseas perceptions of London’s cultural offer.
• To emphasise some of London’s more contemporary cultural themes and promote some new messages.
• Shifts perceptions of London’s cultural offer and produce access to new markets
• Ensure that cultural organisations benefit from the high focus on media relations of Visit London and VisitBritain during the coming four years.
• To capitalise on the post-2012 legacy, when London’s profile will be at its highest ever.
London’s Cultural Olympiad 2008 to 2012

The Cultural Olympiad organized by LOCOG launched in September 2008 with the annual London 2012 Open Weekend including festivals, arts performances, free films, music performances and workshop across the UK. An Open Weekend will take place every year until 2012 and is an opportunity for thousands of people to join, do something different and be inspired by the London 2012 Games.

In addition to the Open Weekend, many events form part of the Cultural Olympiad and London 2012 has nine Major Projects which will be phased over the four year Olympiad. These are large-scale projects featured in the bid and form the backbone of all cultural activities:

- Unlimited - Celebrating disability art and culture
- Stories of the World - People of all backgrounds, from every part of the UK, will become 'curators' of the collections and objects held in museums, libraries and archives.
- Festival of Carnivals - A range of outdoor cultural work in London and the UK in the years up to 2012. It culminates in a spectacular street theatre commission in 2012.
- Film Nation - Inspiring new talent to participate in film
- Discovering Places - Encouraging young people to explore the buildings and spaces around them
- Somewhere to - Empowering young people to use space on their own terms.
- Sounds - Showcasing the sound of the nation in 2012
- World Shakespeare Festival - This project will celebrate Shakespeare through a series of international collaborations
- Artists Taking the Lead - Encouraging artists to use the nation as a blank canvas and showcase the UK’s creativity to the world

Hundreds of smaller projects are also already under way. Each encourages participation and celebrates the many cultures that make up the UK. The Cultural Olympiad will run alongside the Olympic Games as part of the nationwide celebration. The Games are an opportunity to raise the profile of the host city with further benefits realised through infrastructure improvements, developing workforce skills to provide a first-class welcome, and upgrading tourist facilities.

The Cultural Olympiad around Britain

Each nation and region of the UK has a Creative Programmer who works with LOCOG and project organisers in their area to develop ideas and maximise their involvement in the Cultural Olympiad. Projects that are approved by LOCOG can then become part of the Cultural Olympiad through being granted the London 2012 Inspire mark.

The type of project that may be granted a London 2012 Inspire Mark is:
- genuinely inspired by the 2012 Games
- well-planned and managed;
- fully-funded;
- participative and accessible;
- free from any commercial support or association.

Cultural Olympiad Trade Opportunities

The opportunities for the trade to get involved in the Cultural Olympiad are quite limited, in so far as events need to have non-commercial funding and support and be organized by not-for-profit organizations (in order to protect the rights of the official sponsors).

For more information about commercial opportunities for and opportunities to be involved in events connected to cultural events (eg catering for events, providing venue) please go to 2012’s ‘Compete For’ website www.competefor.com or email Sarah.Kedge@visitbritain.org
Contemporary Culture

Key Facts Box

• Britain is ranked 4th out of 50 nations for its contemporary culture and its vibrant cities

• Key competitors are the US, Italy and France

• The UK's contemporary cultural activities are more appealing to nations with a similar culture to Britain such as the Nordic nations

• British food is still perceived to be a weakness

• Cosmopolitan Britain can be a key strength but does not appeal to everybody
Britain’s Contemporary Culture and Vibrant Cities are World Famous
Britain is ranked 4th out of 50 nations in terms of having an interesting / exciting contemporary culture such as music, films, art and literature. The UK’s contemporary culture is most highly regarded in Sweden, Poland, Australia, South Africa, Russia, Argentina, and Mexico, but it is highly respected throughout much of the world (NBI).

The UK is strongly associated with film, music, pop videos, and modern design (NBI). VisitBritain’s research has shown that, from a youth perspective, the US, France, Italy (and Spain to a lesser degree) are Britain’s biggest competitors in terms of contemporary culture.

Britain is also ranked 4th out of 50 nations in terms of its vibrant and exciting cities. Although a large part of this is thanks to London, which is a ‘top of mind’ association for most people, other cities such as Edinburgh, Manchester, Liverpool, and Newcastle are becoming more accessible and increasingly recognised. Britain’s vibrant cities are a key motivator for visits to the UK and a real asset.

Contemporary Cultural Activities Appeal to Different Markets
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).

Live music events and Festivals
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). The Nordic nations are the most positive about Britain’s live music events. Some Western European nations and Latin American ones are reasonably positive too. Eastern European nations and Asian nations find the prospect of live music events in Britain less appealing.

We also shouldn’t assume that British music appeals to everyone. A study conducted in the Middle East found that Arab Youths had limited knowledge of British bands and that they are much more involved with the thriving Arabic music scene who they felt look and behave more appropriately.

We need to remember that music should not be seen as a key driver to visit Britain, but as something that people may be interested in doing once in Britain. In the NBI (2009), 24% of online respondents from around the world agreed that music had influenced their holiday destination choice in the past (with just 5% agreeing strongly), whilst 43% disagreed (20% strongly).

It should be considered ‘a hidden opportunity’ and by 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 return visits more likely (TNS, 2007).

Going to a festival is rated as Britain’s 14th best activity and has slightly more appeal for emerging Asian and Latin American markets than mature markets.

Musicals
Going to see a musical is seen quite positively, but compared to the overall picture other activities are seen as more appealing. Musicals have the highest level of appeal to residents of Norway, Sweden, Denmark, and Ireland and demand for tickets is high. Musicals would be more of a priority for older age groups than younger ones, and females ahead of males.

Bars/Clubs
Going to bars or clubs in Britain is far more appealing to younger age groups and to residents of Europe (especially Nordics), the Americas, and Australasia than to residents of Asia, who may be less enthusiastic for religious or cultural reasons.

Qualitative research shows that there is low awareness of what is actually on offer in Britain in terms of nightlife, but many visitors express the desire to go to a pub whilst in Britain as they are considered to be a famous British institution.
Films
Visiting places from films/tv is rated as only the 25th best activity in Britain by potential visitors (out of 32). The small proportion of visitors actually going to film/TV/music/literary locations (2%) demonstrates that these are very much niche activities.

Research shows that films have some influence over travellers’ destination choices but other factors are more important. In the NBI 2009, 36% of respondents agreed that films they have watched had influenced their choice of holiday destination (7% agreed strongly). However 33% disagreed (with 14% disagreeing strongly), so films are not a motivator for everybody.

Despite these findings, it still makes sense to use films to promote Britain overseas. Given that films are viewed by millions of people worldwide and stimulate plenty of media coverage, VisitBritain has found that they work as a great vehicle to showcase some of Britain’s best assets. Although this coverage may not convert into mainstream visits to the locations portrayed in the film, the films help to create buzz around Britain as a destination and can help with updating stereotypes about Britain, challenging long-standing perceptions of Britain, and giving an emotional attachment to Britain.

Shopping/Fashion
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. Shopping for fashion is far more appealing to females than males, and younger women say it would be one of their top priorities on an ‘imagined trip’ to Britain.

Indeed, shopping for clothes/accessories is one of the most common activities for actual visitors. 60% of holiday visitors hit the shops when they came to Britain in 2007, with women slightly more likely to do so than men.

People come to shop in Britain for many different reasons. For some it is all about the branded goods they can’t get elsewhere whereas for others it is about buying souvenirs to take back home as tourist trophies, about saving money or shopping at discount stores that they don’t necessarily have back home.

Visitors from nearby countries are most likely to pop over especially to shop, with the French, Belgians, Dutch, Norwegians, Irish, and Germans. The Eurostar is particularly popular for French and Belgian shoppers. Shopping was hugely popular in the UAE compared with other activities – perhaps more strikingly so than in any other market.

British Food
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. Some visitors are aware of the wide diversity of food Britain has to offer whilst others just associate it with afternoon tea and fish and chips.

We also know that food and eating out is an important driver to many tourists. Research conducted in 2007 amongst Europeans shows that a “good range of local food and produce” and a “wide choice of food from different cultures” was seen to be a weakness for Britain. It was also relatively more important for older people and also for the French and Spanish markets. Similarly, the availability of good restaurants and fine dining was an issue and is seen to be a weakness in Britain’s offering.

Cosmopolitan Britain
The concept of cosmopolitan Britain can be somewhat difficult to conceptualise. Generally Britain is seen to be a traditional destination full of historic heritage whilst its capital city, London, is regarded as one of the most hip and happening places in the world. Our challenge is to educate prospective visitors that Britain is a cosmopolitan destination with a wide range of experiences and activities on offer. Additionally, these could also help to address poor value and food perceptions as well as address perceptions of unfriendliness. However we need to be careful to only accentuate the positives of cosmopolitan Britain as this “cosmopolitanness” doesn’t necessarily appeal to everyone.
The Nation Brands Index (2009) asked respondents from 20 countries around the world to select cultural products they would associate with the UK (many respondents in the survey have not actually visited the UK, so the above chart is based upon a mixture of visitors’ experiences and non-visitors’ perceptions of the UK).

Of the words listed to choose from, 50% of respondents associated the UK with museums, understandable when you consider that the UK is often seen as an ‘Educational’ destination (see Chapter 2).

However, many respondents also associated the UK with more contemporary culture such as music (44%), films (41%), sports (39%), pop videos (36%), and modern design (32%), and it’s these sorts of associations that help make Britain an ‘Exciting’ destination.

Competitors such as France and Italy, who are also seen to excel in offering world-class culture and heritage are seen as more ‘romantic’ destinations than the UK, so to differentiate itself the UK’s best strategy may be to concentrate on offering ‘exciting’ experiences.

VisitBritain’s research into the Brazilian market in 2009 showed that, amongst the youth market, the UK is seen as the destination for the best of the music, fashion and alternative scenes.
As discussed in Chapter 1, Britain is ranked 4th out of 50 nations in terms of having an interesting/exciting contemporary culture such as music, films, art and literature (according to respondents from 20 countries from the Nation Brands Index 2009). But what is each country’s opinion of Britain’s contemporary culture?

The chart below shows how different countries rate Britain’s contemporary culture, and how this rating compares to Britain’s top contemporary culture competitor. The ‘vertical-axis’ shows how each country rates Britain’s contemporary culture on a scale from 1-7. The ‘horizontal-axis’ shows the difference between how each country rated the UK’s contemporary culture and the country they regarded as the best in terms of contemporary culture. Looking at the following chart allows us to categorise countries into 4 quadrants based on how they view the UK’s contemporary culture relative the top competitor.

- **MAINTAIN PERCEPTIONS AND PROMOTE** (top-right quadrant): These countries have a positive view of the UK’s contemporary culture and do not see other countries as being much more interesting in terms of their contemporary culture. This means that the UK is a strong competitor, so promoting the UK’s contemporary culture in these countries should reap rewards. The UK’s contemporary culture is most highly regarded in Sweden, Poland, Australia, South Africa, Russia, Argentina, and Mexico.

- **NEED TO IMPROVE PERCEPTIONS** (lower-left quadrant): These countries do not have a positive view of the UK’s contemporary culture and see other countries as being far richer in terms of their contemporary culture. This means that a complete overhaul of perceptions would be necessary for them to regard the UK as a destination worth visiting for its contemporary culture. Of the countries surveyed in the NBI 2009, only Turkey fits into this category.

- **HARD TO IMPROVE PERCEPTIONS** (lower-right quadrant): Countries that fall into this category do not have a very positive view of the UK’s contemporary culture but they do not see any other country as being much more interesting in terms of their contemporary culture. Only Germany fell into this category in the NBI 2009.

- **OPPORTUNITY TO IMPROVE PERCEPTIONS** (top-left quadrant): These countries have a positive view of the UK’s contemporary culture but see other countries as having a much richer contemporary culture. This means that the UK may be overlooked in favour of other nations where holidays are driven by an interest in contemporary culture.

![Chart showing how different countries rate Britain's contemporary culture](chart.png)

How Interesting the UK is perceived to be in terms of contemporary culture compared to the 'most interesting countries'
Contemporary Culture's impact on Britain as a destination and as a nation brand

Popular culture, which encompasses such things as TV/film, British stars, fashion/style, royal scandals, and recent history (eg 60s; Punk) came up strongly as a compelling part of the Britain experience (VisitBritain Brand Tracking research 2004.)

TV can also help in inspiring and triggering trips – for example in Germany, Rosamunde Pilcher’s novels have been dramatised on TV and are particularly popular. They have raised the profile of Britain amongst Germans.

Vibrant Cities

The UK is ranked 4th out of 50 nations in the Nation Brands Index in terms of its ‘vibrant and exciting cities’. As was discussed in Chapter 1, the UK’s vibrant cities are a strong driver of visits, attracting visitors from around the world. Although a large part of this is thanks to London, which is a ‘top of mind’ association for most people, other cities such as Edinburgh, Manchester, Liverpool, and Newcastle are becoming more accessible and increasingly recognised.

Market Competitors

The European Youth research (2009) shows us that the US, France, Italy (and Spain to a lesser degree) are Britain’s biggest competitors when it comes to contemporary culture. The US seems to lead the way ahead of any European destination, however a lot of this is probably due to the large amount of publicity the US gets through television and films. Youths interviewed all seemed to be looking for fun and a sense of excitement from a destination. Unfortunately, although Britain is known for its contemporary culture amongst European youths it is seen to fall somewhat short in the fun category.

Research tells us again and again that Britain is known to be a trend setter and the place where many things are ‘born’ which oddly has become a sort of fact or truth… a stereotype for want of another word. It is something that we know about Britain and accept which although it appeals to some, it acts more like secondary driver. It doesn’t necessarily make people feel emotive about it and want to visit now.
Around the World: Appeal of Live Music Events to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

How to read the chart below:
The red line shows how respondents from around the world rate going to see live music concerts or events in Britain compared to other activities. Where the red line is close to the outside of the ‘spider-web’ this indicates that the activity is highly rated compared to other activities. Where the red line is close to the centre of the ‘spider-web’ then the activity is not rated so highly – Britain is seen as better for other activities.

The blue line shows how likely respondents say they would be to see live music concerts or events if they were to visit Britain. Where the blue line is close to the outside of the ‘spider-web’ this indicates that the activity would be a top priority compared to other activities. Where the blue line is close to the centre of the ‘spider-web’ then the activity is not seen as a priority by most potential visitors.

Compared to other activities, going to live music concerts or events is rated as the 16th best activity to do in Britain (out of 32), and is 19th on the list of priorities in terms of likelihood to participate.

There is some variation when looking at how different countries rate it. Nordic nations are the most positive about Britain’s live music events.

Other nations from Western Europe (eg Portugal, Spain, Ireland) and Latin America are reasonably positive too. Eastern European nations (with the exception of Estonia), and Asian nations (with the exception of Indonesia) find the prospect of live music events in Britain less appealing.

We also shouldn’t assume that British music appeals to everyone. A study conducted in Saudi Arabia and the UAE found that Arab Youths had limited knowledge of British bands and that they are much more involved with the thriving Arabic music scene who they felt look and behave appropriately. Therefore we need to be careful in which markets we promote British music and especially what bands as some of the morally questionable bands are likely to push people away rather than drawing them in.

Appeal of Live Music Events to Potential Visitors of Different Age Groups and Genders

The chart below shows that the idea of going to concerts/live music events has a similar priority level for potential visitors if they were to come to Britain, regardless of age or gender. Presumably, this is due to the appeal of past artists and bands as well as current ones.
Does Music Drive Visits to the UK?

Britain has long been a pioneer in terms of leading world music. We only need to think of the many British bands that have and still dominate the world music. Where would music be today without the Rolling Stones, Oasis and the Smiths?

The British pop scene is very well perceived with British bands always at the top of the charts. As a result, Britain is seen as a trendy, upbeat destination that many youngsters would like to visit.

VisitBritain commissioned a survey in 2009 (conducted by Harris Interactive) which found one in three U.S. adults listens to British music regularly, over any other non-U.S. musical artists.

When asked which British musical artists they listened to in the past twelve months, nearly half of U.S. adults surveyed said The Beatles (48 percent) and Elton John (49 percent), with The Rolling Stones also ranking high on their playlists (41 percent). Over one-third chose stars of today like Coldplay (36 percent) and one-fifth chose Amy Winehouse (21 percent), both of which have quickly become mainstays in American pop music. When Coldplay’s single “Viva la Vida” debuted in 2008, it took the top spot on the UK Singles Charts and Billboard’s Hot 100, making it the band’s first number-one single and transatlantic number-one.

But we need to remember that music should not be seen as key driver to visit Britain but as something that people may be interested in doing once in Britain. When asked, “To what extent, if any, do your musical interests influence your choice of a vacation destination(s)?”, only 3% of American respondents said it had a great deal of influence. A further 16% said it had some influence.

These results were mirrored when VisitBritain sponsored a question on the Nation Brands Index (2009) (an online survey of 20 nations) to understand more about potential visitors’ attitudes towards Holidays. 24% agreed that music had influenced their holiday destination choice in the past (with just 5% agreeing strongly), whilst 43% disagreed (20% strongly). Whilst it might be motivate visits for a handful of people, music can not be seen as a mainstream reason to visit.

Hidden Opportunity

Research undertaken for VisitBritain by TNS in 2007 showed that the availability of cultural events, music, and festivals in Britain is a ‘hidden opportunity’. Hidden opportunities aren’t regarded as important in choosing a holiday destination, but they do have a sizeable impact on visitors’ experiences. Encouraging more visitors to get involved with these highly rated activities once they have decided to come to Britain in the first place should help drive repeat visits and recommendation of Britain as a destination.
Musicals

Around the World: Appeal of Going to see a Musical to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Going to see a musical

Overall, going to see a musical is seen quite positively, but other activities are seen as more appealing. On average, it was rated as Britain’s 20th best activity (out of 32), and potential visitors also had it in 20th place in terms of likelihood to undertake.

Musicals have the highest level of appeal to residents of Norway, Sweden, Denmark, and Ireland and demand for tickets is high. In general they are excellent linguists, they can fully enjoy the splendours of British culture and as such they rate the thought of going to a musical highly, and indicate this would be a high priority if they were to visit Britain.

Eastern European nations are least interested in musicals relative to other activities.

Appeal of Musicals to Potential Visitors of Different Age Groups and Genders

The chart below shows that, on a trip to Britain, musicals would be more of a priority for older age groups than younger ones, although this age effect is far clearer amongst males than females. 18-24 year old males would not regard seeing a musical as a priority, whereas 18-24 year old females would be more open to the idea. However, in broad terms for all demographic groups, other activities may be more popular.
Nightclubs and Bars

Around the World: Appeal of Going to Bars and Clubs to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Going to bars or clubs

Going to bars or clubs in Britain is far more appealing to residents of Europe, the Americas, and Australasia than to residents of Asia.

In terms of both how they rate Britain’s bars/clubs, and how likely they say they would be to go, the Nordic markets see Britain’s bars/clubs as one of the most exciting aspects of a trip.

The Irish, on the other hand, do not rate Britain’s bars/clubs quite as highly as other activities (rank 10th) but they do see it as an inevitable activity if they were to visit Britain (rank 2nd).

Asian nations do not see Britain’s nightlife as a priority, possibly owing much to religious or cultural reasons.

However, we should not assume that all nations know what Britain’s nightlife is like. Qualitative research carried out in Greece in 2005 shows that there is low awareness of what is actually on offer in Britain in terms of nightlife.

Appeal of Bars/Clubs to Potential Visitors of Different Age Groups and Genders

The chart below clearly shows that going to bars/nightclubs is most appealing to 18-24 year old males (it would be their second highest priority on a trip to Britain), and least appealing to 55-64 year old females (21st out of 32 activities). In general, bars/nightclubs were far more appealing to males than females.
Nightclubs and Bars (continued)

Around the World: Appeal of Going to a Nightclub to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Going to a nightclub

The image of Britain’s youth culture in terms of music and fashion is very strong in Germany and the German youth are keen to experience Britain’s nightlife. Apart from London, Edinburgh, Glasgow and Manchester are now very popular destinations.

The chart below shows that going to nightclubs in Britain is most appealing to 18-24 year old males. It is not a great surprise to see that going to a nightclub is less and less of a priority as age increases, but it is interesting to see that it is a far higher priority (7th out of 32 activities) for males aged 18-24 than females of the same age (19th).

Countries it appeals to most include Norway, Sweden, Ireland, Argentina, Brazil, Mexico, the USA, and Canada.

Brazilians are keen to explore Britain’s nightlife. Almost all Brazilian consumers interviewed in VisitBritain’s research (2009) said they wanted to go to a pub whilst in Britain as pubs are a famous British institution. It was part of immersing themselves into British culture and seeing the local colour and the distinctive and different things about Britain.

Mexicans are attracted to bars and clubs (and 9% went to nightclubs in 2006 - IPS), but they aren’t quite as keen on visiting a pub. Indeed, the IPS 2007 figures show that Mexicans were significantly less likely to visit a pub than visitors from other countries. Research conducted by VisitBritain in the summer of 2009 showed that fun nightlife imagery is a chance to show the Britain in a warmer light.

The image on the previous page showed that ‘going to a bar or club’ in Britain would be an appealing activity for potential visitors from many nations, but when only ‘going to a nightclub’ was asked about the response was less positive. Overall, going to a nightclub was rated as the UK’s 29th best activity (out of 32), and 25th in terms of how likely potential visitors said they would be to undertake it if they were to were to visit Britain. However, as the chart opposite shows, it is appealing to younger age groups.

The chart opposite shows that going to nightclubs in Britain is more appealing to 18-24 year old males. It is not a great surprise to see that going to a nightclub is less and less of a priority as age increases, but it is interesting to see that it is a far higher priority (7th out of 32 activities) for males aged 18-24 than females of the same age (19th).

Countries it appeals to most include Norway, Sweden, Ireland, Argentina, Brazil, Mexico, the USA, and Canada.

Brazilians are keen to explore Britain’s nightlife. Almost all Brazilian consumers interviewed in VisitBritain’s research (2009) said they wanted to go to a pub whilst in Britain as pubs are a famous British institution. It was part of immersing themselves into British culture and seeing the local colour and the distinctive and different things about Britain.

Mexicans are attracted to bars and clubs (and 9% went to nightclubs in 2006 - IPS), but they aren’t quite as keen on visiting a pub. Indeed, the IPS 2007 figures show that Mexicans were significantly less likely to visit a pub than visitors from other countries. Research conducted by VisitBritain in the summer of 2009 showed that fun nightlife imagery is a chance to show the Britain in a warmer light.
Types of Nightclub Visitors?

How many visitors…
According to the IPS, 2.8 million visitors from overseas (9%) went to a nightclub in 2006.

Journey Purpose
Going to a nightclub in the UK was undertaken by:
- 41% of Holiday visitors
- 19% of VFR visitors
- 7% of Business visitors
- 11% of Miscellaneous visitors
- 48% of Study visitors

Top Markets by Volume
Around 370,000 visitors from the USA went to a nightclub in 2006. Approximately 300,000 visitors from Ireland, 270,000 from France, 240,000 from Germany, and 220,000 from Spain did likewise. This is not surprising given that these are Britain’s five largest inbound markets.

According to the IPS, 2.8 million visitors from overseas (9%) went to a nightclub in 2006.

Journey Purpose
Going to a nightclub in the UK was undertaken by:
- 41% of Holiday visitors
- 19% of VFR visitors
- 7% of Business visitors
- 11% of Miscellaneous visitors
- 48% of Study visitors

Top Markets by Volume
Around 370,000 visitors from the USA went to a nightclub in 2006. Approximately 300,000 visitors from Ireland, 270,000 from France, 240,000 from Germany, and 220,000 from Spain did likewise. This is not surprising given that these are Britain’s five largest inbound markets.

Which demographic groups are most likely to go to nightclubs?
The following chart clearly shows that visitors falling into the 16-24 and 25-34 age brackets are most likely to hit a club when in the UK. This comes as no great surprise. A small number of under 16s managed to get into a nightclub, but perhaps more surprising is the small proportion of over 65s that went to a club!

Given the appeal of nightclubs to Norwegians and Swedes (NBI) it is no surprise to see these nations appearing in the top ten.

Similarly, the Spanish love being out on the streets in the evenings, talking, drinking, eating tapas, and being part of the crowd, and this is probably the most treasured part of their lifestyle. At weekends, youngsters will think nothing of staying out until 5-6am, dancing the night away.

Greece (15%), the Czech Republic (14%), and the UAE (14%) also featured highly. The latter made the top ten courtesy of a high VFR contingent (presumably ex-pats) going to nightclubs.
Bollywood Feature

Bollywood is a major driver – influencing and inspiring Indian people to visit destinations, which are depicted in Bollywood films.

In June 2007, the “Bollywood Oscars” (International Indian Film Awards) were held in Yorkshire, with one highlight in Sheffield being an award ceremony estimated to have been watched by up to 350 million people around the world. The Indian film industry is one of the largest in the world and produces more than 800 films a year, with an annual turnover of Rs60 billion and employing more than 6 million people. With over a billion potential viewers, it is critical for film producers to introduce a fresh look into each new film: step forward exotic locales!

The award winning Slumdog Millionaire is a 2008 British film directed by Danny Boyle and co-directed in India by Loveleen Tandan. Set and filmed in India, the film tells the story of a young man from the dharavi slums of Mumbai who appears on the Indian version of Who Wants to Be a Millionaire? It won seven BAFTA Awards (including Best Film). The film was also inspired by Indian cinema and Tandan has referred to Slumdog Millionaire as a homage to Hindi commercial cinema. The rags-to-riches, underdog theme was a recurring theme in classic Bollywood movies from the 1950s through to the 1980s, when India worked to lift itself from hunger and poverty.

The equally growing TV industry is not far behind the trend of looking for new filming locations. It is imperative for Britain to realise the financial earning potential of this important segment, as well as the enormous free publicity and goodwill generated for a destination when millions of viewers worldwide go for a virtual destination trip. It is indirect “advertising” on a scale which is unaffordable for even the richest National Tourist Office. Virtually every NTO is wooing the multi-billion Bollywood film and entertainment industry to shoot movies, advertising spots and documentaries at their destinations. When the ATC worked with an Indian TV company to shoot a soap opera against icons like the Sydney Opera House, 15 million Indian Hindis watched the series. Singapore Tourism partially funded the blockbuster ‘KRRISH’ as did the Korean Tourism Board with another multi-starrer. The South African Promotion Tourism Board has appointed a famous film star, Anil Kapoor as their board ambassador.

Bollywood movies are often given names in English - they are seen as catchy - especially for the youth market, eg “Bend it like Beckham”, “Bride and Prejudice”, “London Dreams”, “Bhaji on the Beach”, “Monsoon Wedding” etc.

The London Eye is one of London’s most popular filming locations. Shoots include “Bride & Prejudice” (2004), “Wimbledon” (2004) and “Thunderbirds” (2004). Some of the London locations where films were shot are: Waterloo Station - In “Jhoom Barabar Jhoom” (2007), it is the key location around which the story revolves, including a dance sequence starring Amitabh Bachchan.

The large number of Indian films being shot here has prompted VisitBritain to bring out a ‘Bollywood map’ depicting the locations where popular films have been shot. Visiting such locations are a must for the thousands of Indian tourists who flock to Britain every year. Some of the most popular locations for Indian films have been Trafalgar Square, Natural History, Museum, Tower Bridge, Royal Albert Hall, Millennium Dome, Parliament, Nelson’s Column and the London Eye.

Southall is home to one of the largest Indian communities in London and was the setting for Simran’s home in “Dilwale Dulhania Le Jayenge” (1995). The Albert Memorial features in “Mujhse Dosti Karoge” (2002) and also appears in “The Jokers” (1967), starring Michael Crawford and Oliver Reed, and “Greystoke: The Legend of Tarzan, Lord of the Apes” (1984).

Hyde Park was one of one of the locations for a song in “Kabhi Khushi Kabhie Gham”. The song culminates with an early morning dance sequence shot at the British Museum. John Woodward, chief executive of the UK Film Council, said the effect of film tourism was long lasting. "British films and television programmes play a powerful role in showcasing the UK to the rest of the world and that is boosting tourism”. In March 2005, the then Culture Secretary of state, Tessa Jowell, struck a deal to start negotiations which makes it easier for the UK film industry to share expertise with Bollywood - the largest film industry in the world. She met Indian Film Minister, Shri Jaipal Reddy, in Delhi, to develop a co-production treaty with India. The treaty enables film makers in the UK and India to pool their resources to create films which benefits both countries financially and culturally.

The Indian market has shown fairly consistent growth in visits to the UK since 1993. However the biggest increases in the number of Indian visitors to the UK have been since 2003. Nearly a quarter of Indian visitors are VFR visitors. VFR is an very important market for Britain, and makes up a significant proportion of all visits and staying for an average of 40 nights at a time.
Films and Television Locations

Around the World: Appeal of Visiting Places from Films or TV to Potential Visitors

In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Films as a driver to visit

Research shows that films have some influence over travellers’ destination choices, but other factors are more important. In the NBI 2009, 36% of respondents agreed that films they have watched had influenced their choice of holiday destination (7% agreed strongly). However, 33% disagreed (with 14% disagreeing strongly), so films are not a motivator for everybody.

In 2007, TNS conducted analysis amongst European travellers, and film locations were not found to be important in motivating trips or recommendations.

PR opportunities

Despite these findings, it still makes sense to use films to promote Britain overseas. Given that films are viewed by millions of people worldwide and stimulate plenty of media coverage, VisitBritain has found that they work as a great vehicle to showcase some of Britain’s best assets. Although this coverage may not convert into mainstream visits to the locations portrayed in the film, the films help to create buzz around Britain as a destination and can help with updating stereotypes about Britain, challenging long-standing perceptions of Britain, and giving an emotional attachment to Britain.

The learning to take away is that it is important to ensure that films used for PR show motivating aspects of Britain in a positive light (i.e., as a destination rich in culture and heritage, natural beauty, or as a welcoming destination rather than as a gritty or cold destination).

VisitBritain has recently used films such as Sherlock Holmes to promote Britain and has even developed a free iPhone application allowing users to view film locations on a map. Movie locations featured not only in “Harry Potter” but also other films such as “Bridget Jones’s Diary” or “Miss Potter” are also becoming reasonably popular places to visit.
How many visitors…
According to the IPS, 765,000 visitors from overseas (2.3%) visited TV/film locations in 2006.

Journey Purpose
Going to a TV/film locations in the UK was undertaken by:
• 3.1% of Holiday visitors
• 2.5% of VFR visitors
• 0.9% of Business visitors
• 1.8% of Miscellaneous visitors
• 9% of Study visitors

The small proportion of visitors going to these locations implies that they are very much a niche reason for visiting. Indeed, the fact that Study visitors are significantly more likely to visit these locations than Holiday visitors implies that going to TV/film locations is currently something to do while in the UK as an ‘added bonus’ rather than a mainstream reason to visit in the first place.

Top Markets by Volume

Around 140,000 visits from the USA included a TV/film location in the UK in 2006. Approximately 106,000 visits from France and 77,000 from Germany did likewise. This is not surprising given that these are three of Britain’s largest inbound markets.

Top Markets by Percent

Looking at the proportion of visitors from each market who went to TV/film locations, the IPS statistics indicate that New Zealanders, Brazilians, and Hungarians had the highest propensity in 2006.

Given the small sample sizes involved, caution is necessary when drawing any firm conclusions from the data on a country by country level.

Which demographic groups are most likely to visit Film and TV Locations?

The above chart shows that visitors falling into the 16-24 age bracket are most likely to visit TV/film locations when in the UK. This is largely driven by the proportion of Study visitors aged 16-24 (11%) who visited these locations, rather than Holiday visitors (3.9%).
Fashion week is a fashion industry event, lasting approximately one week, which allows fashion designers, brands or "houses" to display their latest collections in runway shows and buyers to take a look at the latest trends. Most importantly, it lets the industry know what's "in" and what's "out" for the season. The most prominent fashion weeks are held in the fashion capitals Milan, London, New York, and Paris.

Fashion weeks are held several months in advance of the season to allow the press and buyers a chance to preview fashion designs for the following season. The schedule begins with New York, followed by London, with the penultimate fashion week in Milan, and the events ending in Paris. These four cities are the traditional "big four" fashion weeks that are followed by new emerging fashion weeks globally.

London’s Fashion Week (or British Fashion Week - BFW) was held in February 2010 and showcased 200 of the industry’s most creative UK and international brands. It works with fashion buyers to provide a fresh approach at an accessible price point.

Britain’s status as one of the world’s fashion leaders is commented on by many consumers. Research shows that visitors see themselves shopping whilst in Britain and being able to afford British designer brands is often seen as a status symbol.

Ethical Fashion

Efforts to live more sustainably can take many forms and over recent years there has been an increasing surge in environmental green related issues such as ethical products, greener labelling and packaging, reduction of carbon footprint and hybrid and electric cars. Indications show that the future trends lie in sustainability labelling and zero waste.

Estethica is the British Fashion Week’s eco sustainable initiative which is sponsored by Monsoon. It has evolved to become the epicentre for London’s ethical fashion industry; the success of this initiative, is evident in its rapid growth. New to the initiative are "The North Circular", a new brand which focuses on rescuing sheep from slaughter, natural yarns, UK local cottage industry and knitting grannies.

Emerging Designers

In December 2007, the London Development Agency awarded the British Fashion Council a grant, worth £4.2 million over three years, to provide business support to emerging designers in the UK capital and raise the profile of London Fashion Week in international markets. As a world-renowned centre of fashion, London plays a vital role in the UK designer fashion industry. The city is home to the majority of the country’s leading designers and the headquarters of international brands.

Much of the UK’s reputation within the global fashion community is built on a exceptional fashion educational institutes; London has some of the most prominent training colleges for fashion designers worldwide, with an impressive alumnus roll-call which includes Giles Deacon, John Galliano, Stella McCartney and Alexander McQueen, to name just a few.

VisitBritain research into the study market shows although a fair proportion come to Britain to study traditional subjects, Britain is creating a name for itself as a good international destination to study creative courses such as fashion design, jewellery, art and so on. Other research conducted by VisitBritain in the UAE in 2007 amongst Arab youths talks about the paradigm shift of women’s roles from traditional careers in the UAE such as teachers to a growing interest in the creative industries. Britain is seen to be a key destination to study these types of subjects.
Design and Fashion

Around the World: Appeal of Shopping for Fashion to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Shopping for fashion – clothes & accessories

Hitting the shops is not generally 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 (rank 10th).

Potential visitors from nearby European countries in particular (Ireland, France, Belgium, Netherlands, Switzerland, Norway, and Denmark) could see themselves shopping if they came to Britain.

People come to shop in Britain for many different reasons. For some it is all about the branded goods they can’t get elsewhere, whereas for others it is about buying souvenirs to take back home as tourist trophies, about saving money (eg Russians) or shopping at discount stores that they don’t necessarily have back home (eg Poland).

Visitors are interested in shops that offer a good range of local products that are not available in their home country as well as branded goods offered at high street prices. However, as consumers become more discerning shoppers, especially those from Asia, so will the competition increase. Other destinations are fiercely competing for a piece of the shopping “pie” and in some cases are able to offer the goods at cheaper prices (eg Hong Kong).

Long-haul markets that say they would be likely to hit Britain’s shops include Egypt, India, Singapore, Malaysia, and Korea. Shopping is an important holiday activity for the Singaporean traveller and interest in factory outlets and shopping outlets is high.

Appeal of Shopping for fashion to Potential Visitors of Different Age Groups and Genders
The chart below clearly demonstrates that, for potential visitors, shopping for fashion in Britain is far more appealing to females than males. It is regarded as a top priority for 18-24 year old females, and is a high priority for females of all ages. There is also some interest in this activity from 18-34 year old males.
Branded Goods
An article in the Economist in June 2006 noted that luxury branded goods tend to be cheaper in Britain than in China and are also guaranteed not to be fakes. The Chinese also like to buy gifts for relatives, friends and colleagues after a trip abroad but often try to save money on things like food and accommodation in order to buy products for themselves. Famous brands and local products such as Burberry, Clark’s shoes and Scottish whisky are popular.

Other brands that Asian visitors were familiar with were Burberry, Liberty, Pringle, Vivienne Westwood, Laura Ashley, porcelain brands such as Wedgwood, and brands of tea such as Fortnum & Mason.

With the variety of imports available in Singapore, most Singapore travellers are now more discerning shoppers, especially in branded goods. However, branded goods are often more expensive in Singapore and UK branded goods continue to enjoy high status there. Younger Singaporeans are interested in the flea markets and antiques available in Britain.

Japanese working women in their 30s and 40s were able to name significantly more fashion brands than any other respondents in other groups - such as Burberry, Vivienne Westwood, John Smedley, Pringle, Liberty (Japan Research 2008.)

Hong Kong visitors love to shop and brand-name bargains are enthusiastically hunted. Factory outlets and markets are also popular amongst Hong Kong visitors and shopping is often enough of a reason for female visitors to make a repeat visit Britain.

Visiting the UK primarily for shopping
The lead-up to Christmas is the most popular time for visitors to come to the UK whose main reason for visiting is to hit the shops. In 2008, almost 250,000 visitors came to the UK just to shop and, on average, 44% of these trips each year come in the lead-up to Christmas.

The current weakness of the pound means that Britain is in a great position to entice even more shopping visits at present, especially from the Eurozone, so shoppers from abroad can make big savings buying from Britain. Analysis of the data shows that shopping visitors spend almost four times as much per day as other visitors in the UK, but they stay in the UK for a shorter period of time (typically 1-3 nights).

So who comes to shop? It’s no surprise to discover that women are twice as likely as men to make a shopping trip to the UK, almost half aged 25-44. Visitors from nearby are most likely to pop over, ie French, Belgians, Dutch, Norwegians, Irish, and Germans. The Eurostar is particularly popular for French and Belgian shoppers. Shopping was hugely popular in the UAE compared with other activities – perhaps more strikingly so than in any other market.
Types of Fashion Shopper Visitors (continued)

How many visitors...
According to the IPS, 14.6 million visitors from overseas (45%) went shopping for clothes/accessories in 2007.

Journey Purpose
Shopping for clothes/accessories in the UK was undertaken by:
- 60% of Holiday visitors
- 55% of VFR visitors
- 17% of Business visitors
- 34% of Miscellaneous visitors
- 61% of Study visitors

Top Markets by Volume
Over 1.6 million visitors from the USA hit the UK's clothing outlets in 2007. Approximately 1.5 million visitors from France, 1.4 million from Germany, 1.1 million from Ireland, and 1.1 million from Spain did likewise. This is not surprising given that these are Britain’s five largest inbound markets.

Top Markets by Percent
Looking at the proportion of visitors from each market who go shopping, long-haul markets dominate the top 10, with New Zealand (64%), Brazil (62%), and Argentina (60%) making up the top three. Greece, Finland, and Norway are the only European markets to make the top ten.

Emerging Markets
Tourism Intelligence research tells us that the traditional package holiday requirements of sun, sea and sand is being replaced with sightseeing and shopping as the emerging markets shape the travel industry of the 21st century.

Dr Auliana Poon, the consultancy managing director says "In the old days people came back from their holidays with a tan to show they had been away. Now the emerging markets want to come back with shopping purchases to show they have the wealth and status to travel. Many of these travellers won’t have been able to travel in the past because their governments wouldn’t let them. They are now eager to see other cultures, shop in new environments and acquire the status that goes with that.”

There is a growing number of relatively wealthy (by Czech standards) middle-class women willing to spend money on fashion. The Czech market has an incredible number of women’s fashion and style magazines (for its size) and fashion houses are also opening their boutiques in the Czech Republic. The UK is perceived as one of the fashion and design capitals and this, combined with the possibilities of incredibly cheap flights, means that Czechs can travel to Britain for the seasonal sales and benefit from prices much lower than those in the Czech Republic. The European Youth research also shows that the most likely activities to have been undertaken by Czech youths were shopping for clothes/accessories, going to the pub and other shopping - fashion, design, home and antiques.

Which demographic groups are most likely to visit shop for Fashion?
The chart below clearly shows that female visitors are more likely than males to hit the shops when in the UK. This is not purely because a higher proportion of business visitors are male. Female visitors are slightly more likely to go shopping than males regardless of journey purpose.

The high quality of Britain’s services and consumer products are major attractions given the weaker infrastructure prevalent in Brazil. Brazilians love to shop - they are fashion followers and label snobs. Imported goods are still considered more desirable than national ones, even though there may be no difference in quality while the price difference is usually significant. Shopping was also seen to be a key activity to the Argentinian visitor, especially the upper middle classes.
Festivals

Around the World: Appeal of Festivals to Potential Visitors
In late 2006 and early 2007 VisitBritain sponsored questions on the GMI Nation Brands Index to understand the appeal of 32 activities that can be undertaken in Britain. Respondents were asked how they rated Britain as a holiday destination where people might do these activities and which of the activities they personally would be very likely to do on a visit to Britain.

Going to festivals e.g. art, music, literary, film etc

Edinburgh Fringe Festival
The Edinburgh Fringe Festival is the biggest arts festival in the world, with something for everyone: theatre, comedy, music, dance, exhibitions and much more. Established in 1947 as an alternative to the Edinburgh International Festival, it takes place in Scotland’s capital during three weeks every August alongside several other arts and cultural festivals, collectively known as the Edinburgh Festival, of which the Fringe is by far the largest. The Fringe mostly attracts events from the performing arts, particularly theatre and (the big growth area in recent years) comedy, although dance and music also figure significantly. However, there is no selection committee to approve the entries – it is an un-juried festival – so any type of event is possible. In addition to ticketed events there is an ongoing street fair, on the Royal Mile.

Hidden Opportunity
Research undertaken for VisitBritain by TNS in 2007 showed that the availability of cultural events, music, and festivals in Britain is a ‘hidden opportunity’. Hidden opportunities aren’t regarded as important in choosing a holiday destination, but they do have a sizeable impact on visitors’ experiences. Encouraging more visitors to get involved with these activities once they have decided to come to Britain in the first place should help drive repeat visits and recommendation of Britain as a destination.

Therefore events such as the Edinburgh Festival create secondary drivers to motivate people to visit and to encourage them to visit destinations they had not previously thought about visiting. It also gives visitors a reason to return.
Modern British Food

This 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 by the experiences they had (eg walking around with a guidebook in Leicester Square) and their budget. Other elements also come into play; for example, are the French ever going to admit to liking British food and it is well known that most Asians prefer eating Asian food anyway.

Domestically things are changing and food is starting to become a key driver. Research conducted over the past couple of years has showed that English visitors are interested in trying local food and drink whilst on holiday. Qualitatively, on the overseas front “poor food” is mentioned consistently, especially in cases when people actually haven’t been to Britain! However qualitative research amongst actual visitors shows that it is quite common to be pleasantly surprised at the range and variety available. Most nationalities express a desire to “try” regional food and drink but this is viewed somewhat as a sense of “novelty” eg try a full cooked breakfast, or fish & chips - just the once - rather than an understanding that people will enjoy the culinary experience holistically in Britain (as they do in France or Italy).

Celebrity Chefs

Britain is home to some of the world’s best chefs, and many of them have now become national and international celebrities. In fact many “trainee” French chefs are coming over to Britain to cook as they find the cooking style in Britain a lot less restrictive. British cookery programmes (such as Jamie Oliver, Gordon Ramsey’s F Word, Masterchef, Hell’s Kitchen, Gary Rhodes and Rick Stein) are popular in many countries around the world and are all raising the profile of British food. However perceptions take time to change.

Awareness of Modern British Food Varies

Some visitors are aware of the wide diversity of food Britain has to offer whilst others just associate it with fish and chips and afternoon tea. We also know that food and eating out is an important driver to many tourists. For example research conducted in Canada explains that when on holiday Canadians love to sample local food in little local restaurants whilst absorbing the culture and watching the world go by. The quality of the food or produce is another important factor. Hong Kong respondents told us that ‘quality’ was the most important aspect when buying food and the ‘origin’ of the product the least important. They also said that when travelling on holiday overseas three quarters of them like to sample the local cuisine in street side stalls and cafes and 51% in middle price range restaurants whilst absorbing the culture and watching the world go by. Sightseeing and visiting famous places is their first priority when travelling on holiday, tasting different foods comes second. (Asian Food research 2006).

Curry - Britain’s National Dish?

There has been a great deal of dispute about what constitutes Britain’s national dish. In days gone by many would have said it was traditional roast beef with Yorkshire pudding or otherwise fish and chips. However controversy railed through out Britain when former foreign secretary Robin Cooke hailed Chicken Tikka Masala as Britain’s national dish. There are now around 8,750 curry houses in the UK and many of the latest food and destination guides (eg London’s Timeout) hint at the changing landscape of curry in Britain and the sheer variety of regional dishes and restaurants which can now be found. London in particular has a number of fine dining Indian restaurants with chefs who have trained in some of India’s top hotels - “Rasoi Vineet Bhatia” being the latest of a prestigious line, which includes Sarkhel’s from the same premium background but with a more local approach.

European Experiences

TNS Visitor Satisfaction research amongst six European nations conducted in 2008 shows that a “good range of local food and produce” and a “wide choice of food from different cultures” was seen to be a weakness for Britain. It was also relatively more important for older people and, understandably so, for the French and Spanish markets. Similarly, the availability of good restaurants and fine dining was also seen to be an issue and scored below average - again being seen to be a weakness in Britain’s offering. Informing visitors of the high quality, good value places to eat is essential to improve experiences.
Cosmopolitan Britain

The concept of cosmopolitan Britain can be somewhat difficult to conceptualise. Generally Britain is seen to be a traditional destination full of historic heritage and with perhaps stuffy overtones whilst its capital city, London, is regarded as one of the most hip happening places in the world.

“The streets of London are the most inspiring in Europe. The London girl is the epitome of cool right now.”
Alice Temperley

Dictionary.com defines the word cosmopolitan as “belonging to all of the world; not limited to just one part of the world”. As one might expect Britain is seen to be more cosmopolitan amongst the youth markets or the young at heart. These are also the types of people that have the highest propensity to use online travel services and fly low cost airlines.

Views from Around the World

A VisitBritain study (2009) looking at attitudes of European youths towards Britain found Britain is seen to be quite a traditional destination that has an interesting history and heritage but it is also seen to be modern, vibrant, and cosmopolitan. Britain is also seen to a friendly destination. However France and Italy outperform Britain in areas of culture and heritage and the US outperforms Britain in the contemporary culture areas.

Among young people in Argentina, London is seen as a vibrant city and the fashion centre of Europe. Of growing importance is the allure and attraction of music, nightlife and alternative culture to the youth segment. As Argentina offers a relatively homogeneous cultural environment, the multi-culturalism, rich arts and youth scene in the UK is a unique selling point.

Young Swiss are very keen travellers and spending some time in an English-speaking country is part of a good education. Young Swiss are also primarily interested in city breaks and nightlife. Due to a very strong youth culture (music, fashion, language, etc.), Britain remains a popular destination.

Positively, some nations, such as the Greeks, see Britain as traditional and conservative, whilst at the same time being modern and eccentric. Poles also think Britain is a place with an interesting history and heritage, but also modern, fun and cosmopolitan. However competitors such as Spain and Italy are seen to outperform Britain in terms of heritage aspects.

Cosmopolitan Britain - A Welcoming Prospect?

Our challenge is to educate prospective visitors that Britain is a cosmopolitan destination with a wide range of experiences and activities on offer. Additionally, these could also help to address poor value and food perceptions as well as address perceptions of unfriendliness. However we need to be careful to only accentuate the positives of cosmopolitan Britain as this “cosmopolitanism” doesn’t necessarily appeal to everyone.

Research shows that nations that have stricter moral or religious codes of conduct have expressed negative views about what they see as moral laxity (“drugs, punks and porno”), terrorism, hooliganism and vandalism and do not want any part of it. Some also felt that that Britain is too multi-cultural and has imported problems such as Muslim extremism), antisocial behaviour and football hooliganism) and traffic congestion.
Working in Partnership with VisitBritain

There are many ways of working in partnership with VisitBritain. In agreement with our strategic partners – VisitScotland, Visit Wales, Visit England and Visit London, we operate the Overseas Network as a platform for the five brands and will continue to deliver the following activity in all these markets on behalf of these brands and the travel industry.

Britain marketing

VisitBritain leads on marketing Britain and signposts strategic partner brands. There is a strong focus on building the long term value of the Britain brand and educating consumers about the constituent brands.

For more details on these and other diverse opportunities in markets of interest to you, please visit our UK Industry Website and read our worldwide marketing prospectus, or contact a VisitBritain representative in London or overseas.

www.visitbritain.org

Alternatively, visit VisitBritain’s dedicated website for the UK tourism industry and a searchable database of all VisitBritain’s Marketing Opportunities

www.visitbritain.org/opportunitiesadvice/index.aspx

Why not sign up to our Industry E-Newsletter, or register with VisitBritain to be kept up to date with all that’s new worldwide? www.visitbritain.org/aboutus/newsletter.aspx

London 2012 Games

VisitBritain has 3 objectives for the London 2012 Games:

To maximise the economic benefits for tourism across the UK
To enhance the image of the UK as a visitor destination
To deliver a world-class welcome to visitors in 2012 and beyond

If you would like to ask us something about the London 2012 Games, please email sarah.kedge@visitbritain.org

Premier League

In 2008, we formed a partnership with the Premier League, to promote Britain as the home of football globally and to position Britain as a welcoming destination for football fans from around the world. Click here to see the website:
http://www.visitbritain.com/football

Film Tourism

With 10 years of experience, we are seen as the number one tourism organisation for the promotion of film tourism.

For more information about Football and Film Tourism please email Alison.McKay@visitbritain.org

Information Sources Used to Compile this Report

- International Passenger Survey figures (IPS) (Office for National Statistics)
- Anholt-GMI Nation Brands Index - 2006 & 2007
- Anholt-GfK Nation Brands Index - 2008 & 2009
- VisitBritain Foresight articles (Monarchy and Sporting Activities)
- Beijing research - http://olympicstudies.uab.es/beijing08/eng/content.asp?id_secciones=38&id_subsecciones=71
- ETC Culture Report 2004
- VisitBritain Qualitative UAE Arab Youth research
- VisitBritain TNS Visitor Satisfaction Research 2007
- VisitBritain Australia Youth Research
- VisitBritain European Youth Research 2009
- VisitBritain India Qualitative research 2006
- VisitBritain Italian Families Research 2006
- VisitBritain Qualitative Arab Families Research 2008
- VisitBritain Qualitative Japan Research 2003, 2006 & 2008
- VisitBritain China Qualitative research 2005 & 2007
- VisitBritain Project Lion 2004
- VisitBritain Public Diplomacy research 2002
- VisitBritain Moments of Truth research 2004
- VisitBritain Ancestry research 2007
- VisitBritain Australia, Switzerland, Greece 2009
- VisitBritain Hong Kong and Finland research 2009
- VisitBritain Emerging markets online research (China, Korea, Czech, Poland, Hungary, Russia, Greece) 2005
- VisitBritain Qualitative Latin American research 2009
- Be a Brit Different (US 2007 & 2008)
- VisitBritain Market and Trade Profiles
  www.visitbritain.org/marketprofiles
- VisitBritain Singapore, Thailand and Malaysia research 2006
- VisitBritain Australia, New Zealand and Canada Qualitative 2008
- VisitBritain US Hispanics research 2007
- VisitBritain online US omnibus (music) 2009 via Harris Interactive
- Lynn Jones London Visitor Survey 2007-8
  www.edfringe.com
- www.efi.com
- www.edinburgh.org
- www.londonfashionweek.co.uk
- www.visitbritain.com/football
- VisitBritain Sustainability review
- UNESCO World Heritage
- ALVA statistics for 2008
- Cultural Tourism in Regions of Australia (Tourism Australia)
- Insights Tourism Intelligence Paper (English Tourism Council 2000)
- VisitBritain Latin American Campaign 2009
Summary
VisitBritain estimates that the UK’s Culture and Heritage attracted £4.5 billion of spending in the UK from visitors from overseas, supporting over 100,000 jobs in 2006. These estimates have been derived from activity and spend data from the International Passenger Survey (IPS). The spend figure does not only represent the amount directly spent on ‘Culture and Heritage’ (e.g. the cost of a theatre ticket or entrance to a castle), but the broader amount spent in the UK by visitors that can reasonably be attributed to the pull of its ‘Culture and Heritage’ (i.e. the amount also includes spend on additional activities such as visiting a restaurant or staying at accommodation).

In total, £16 billion was spent in the UK by overseas visitors in 2006, with ‘Culture and Heritage’ motivating 28% of this amount.

International Passenger Survey Data
The International Passenger Survey, run by the Office for National Statistics, provides estimates of the amount that visitors from overseas spend in the UK. Each year, VisitBritain sponsors questions on the IPS to understand more about visitors to the UK. In recent years, we have sponsored questions to determine what activities visitors actually undertook while they were in the UK.

Due to the broad nature and definition of ‘Culture’ and ‘Heritage’ there is no ‘correct’ way to assign which activities should be classed as fitting under ‘Culture’, ‘Heritage’, or ‘Other’.

For the sake of clarity, and for the purposes of this calculation, the full list of activities asked about in 2006 is shown below, together with classifications for each.

It is clear from the table that activities relating to both ‘contemporary’ and ‘traditional culture’ have been classed under ‘Culture’. The definition of ‘Heritage’ may be considered to be conservative – only built heritage activities, museums, and galleries have been included here. ‘Outdoors’ activities have been classed as neither ‘Culture’, nor ‘Heritage’, although it could be argued that some of these could be classified otherwise (e.g. the UK’s coastline could easily be described as part of the UK’s heritage).

<table>
<thead>
<tr>
<th>Culture</th>
<th>Heritage</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting castles, churches, monuments, or historic houses</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Visiting parks or gardens</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Visiting zoos, aquariums, and other wildlife</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Going to the theatre, opera, ballet, or concert</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Visiting Museums or Art Galleries</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Sports Activities</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Shopping (e.g. fashion, design, home, antiques)</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Going to nightclubs</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Watching sporting events</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Visiting literary, music, TV, film locations</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Visiting coastline or countryside</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>
How the estimate was calculated
In order to calculate the amount of spend that can be attributed to the UK’s ‘Culture and Heritage’, a ‘3-level process’ was used, based on:

- the number of ‘Culture and Heritage’ activities undertaken by visitors
- the proportion of activities they undertook classed as ‘Culture and Heritage’
- visitors’ main reason for visiting the UK

The amount of visitors’ spend that can be attributed to the UK’s ‘Heritage and Culture’ can be considered to be dependent on each of the above...

Number of ‘Culture and Heritage’ activities undertaken
Clearly, the number of ‘Culture and Heritage’ activities visitors participated in is of great importance in understanding whether a visitor was motivated to visit Britain for its ‘Culture and Heritage’; if visitors did not participate in any of the listed ‘Culture and Heritage’ activities, then the chances that they were motivated to visit for this reason are likely to be close to zero. Likewise, if they participated in a number of these activities, then it is likely to be a major reason for their visit.

Based on this logic, the table below shows the maximum proportion of visitors’ spend attributed to ‘Culture and Heritage’ based purely on the number of ‘Culture and Heritage’ activities undertaken.

<table>
<thead>
<tr>
<th>Number of listed ‘Culture and Heritage’ activities participated in:</th>
<th>Maximum proportion of spend attributed to ‘Culture and Heritage’ (W1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>1</td>
<td>50%</td>
</tr>
<tr>
<td>2</td>
<td>66%</td>
</tr>
<tr>
<td>3 or more</td>
<td>100%</td>
</tr>
</tbody>
</table>

Proportion of activities undertaken classed as ‘Culture and Heritage’
The proportion of ‘Culture and Heritage’ activities undertaken can also be regarded as a key indicator of visitors’ motivations for visiting the UK. If a visitor participates in a large number of activities, but very few ‘Culture and Heritage’ activities then it can be argued that ‘Culture and Heritage’ may not have been a major driver for their visit. Conversely, if a high proportion of activities undertaken involved ‘Culture and Heritage’ then it is likely that it was a significant driver for a visit.

The table below shows the maximum proportion of spend attributed to ‘Culture and Heritage’ based on the proportion of listed activities undertaken that included ‘Culture and Heritage’.

<table>
<thead>
<tr>
<th>Proportion of listed activities including ‘Culture and Heritage’:</th>
<th>Maximum proportion of spend attributed to ‘Culture and Heritage’ (W2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-24.99%</td>
<td>10%</td>
</tr>
<tr>
<td>25--49.99%</td>
<td>33%</td>
</tr>
<tr>
<td>50-74.99%</td>
<td>66%</td>
</tr>
<tr>
<td>75-100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Purpose of Visit
Thirdly, visitors’ main reason for coming to the UK in the first place tells us a lot about whether their trip may have been motivated by ‘Culture and Heritage’. If a visitor says that business was their main reason for coming then ‘Culture and Heritage’ is not likely to be a big part of their trip (although some business visitors may extend their trip by a day or two to take advantage of the UK’s ‘Culture and Heritage’ offering). There is little reason to assume that Holiday visitors were not motivated by the UK’s ‘Culture and Heritage’ (as long they participated in related activities). VFR visits often involve a mix of both visiting friends and relatives and traditional tourism activities, so often involve a mixed motivation to visit.

<table>
<thead>
<tr>
<th>Main reason for visiting the UK’</th>
<th>Maximum proportion of spend attributed to ‘Culture and Heritage’ (W3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>100%</td>
</tr>
<tr>
<td>VFR</td>
<td>50%</td>
</tr>
<tr>
<td>Business</td>
<td>25%</td>
</tr>
<tr>
<td>Other</td>
<td>25%</td>
</tr>
</tbody>
</table>
The calculation

Taking each of the 3-levels together, the proportion of visitors’ spend motivated by ‘Culture and Heritage’ can be considered to be the product of each of the 3 levels:

\[
\text{Spend motivated by Culture and Heritage} = \text{Total spent by visitor} \times W1 \times W2 \times W3
\]

Example

By way of illustration...

1) A visitor spending £500 who came for holiday, who participated in 3 of the listed activities, 2 of which were classed as ‘Culture and Heritage’:

\[
\text{Spend motivated by Culture and Heritage} = £500 \times 66\% \times 66\% \times 100\% = £217.80
\]

2) A visitor spending £500 who came for holiday, who participated in 6 of the listed activities, 5 of which were classed as ‘Culture and Heritage’:

\[
\text{Spend motivated by Culture and Heritage} = £500 \times 100\% \times 100\% = £500.00
\]

3) A visitor spending £500 who came for business, who participated in 3 of the listed activities, 2 of which were classed as ‘Culture and Heritage’:

\[
\text{Spend motivated by Culture and Heritage} = £500 \times 66\% \times 66\% \times 25\% = £54.45
\]

4) A visitor spending £500 who came to visit friends and relatives, who participated in 3 of the listed activities, 0 of which were classed as ‘Culture and Heritage’:

\[
\text{Spend motivated by Culture and Heritage} = £500 \times 0\% \times 0\% \times 50\% = £0.00
\]

Accounting for visitors where activities are not known

Where spend estimates are known for visitors but activity data is not available, it has been assumed that these visitors participated in the same profile of activities as those for whom activity data is available.

Estimate for Spend Motivated by ‘Culture and Heritage’

Applying the above calculations to the 2006 datasets results in the following estimates for spend attributable to the motivation of ‘Culture and Heritage’:

<table>
<thead>
<tr>
<th>Main journey purpose</th>
<th>Estimated spend in the UK</th>
<th>Estimated spend attributable to ‘Culture and Heritage’</th>
<th>Proportion of spend attributable to motivation of ‘Culture and Heritage’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>£5.0 billion</td>
<td>£3.0 billion</td>
<td>60%</td>
</tr>
<tr>
<td>Business</td>
<td>£4.8 billion</td>
<td>£0.3 billion</td>
<td>7%</td>
</tr>
<tr>
<td>VFR</td>
<td>£3.6 billion</td>
<td>£0.8 billion</td>
<td>23%</td>
</tr>
<tr>
<td>Study</td>
<td>£1.2 billion</td>
<td>£0.2 billion</td>
<td>16%</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>£1.5 billion</td>
<td>£0.1 billion</td>
<td>10%</td>
</tr>
<tr>
<td>Transit</td>
<td>£0.0 billion</td>
<td>£0.0 billion</td>
<td>0%</td>
</tr>
<tr>
<td>Total</td>
<td>£16.0 billion</td>
<td>£4.5 billion</td>
<td>28%</td>
</tr>
</tbody>
</table>

Note

The expenditure figures in this report do not include the cost of getting to the UK. They only include all the money spent on anything within the UK.