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Leveraging Britain's Culture and Heritage

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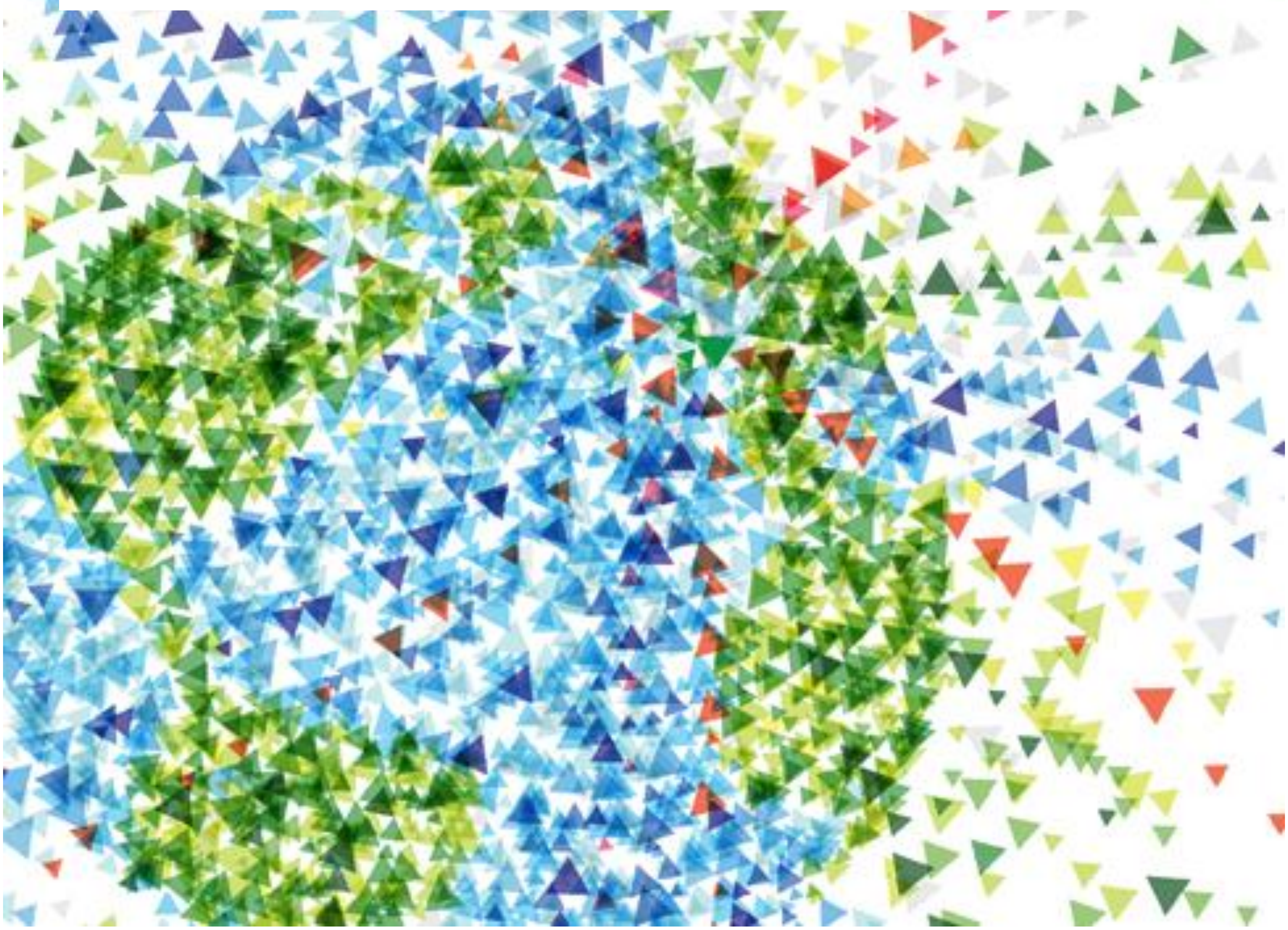


Leveraging Britain's Culture and Heritage

Background

Britain is recognised as a 'world class' destination for culture and heritage. It is these aspects of the British holiday offer that are repeatedly identified as major draws for overseas visitors in research commissioned and reported on by VisitBritain. These strong associations with culture and heritage are identified as opportunities to increase visitor numbers and the value of tourism to Britain in VisitBritain's long term tourism growth strategy.

Our culture and heritage is not only a draw for visitors. Through the Anholt Nations Brand Index (NBI) we have some insight into the perceptions of the UK's culture and heritage amongst respondents in 20 countries around the world. The NBI consistently ranks the UK's strengths in history and culture attributes. In 2014 the UK was ranked 3rd for contemporary culture, 5th for historic buildings and 7th for cultural heritage (out of 50 nations).

The perceptions measured in the NBI are representative of the online population of the panel country and therefore they have not necessarily visited the UK, intend to visit or have even travelled outside their own country. The table below shows the UK's NBI rank (out of 50 nations) from 2008-2014.

Table 1: GfK Anholt Nations Brand Index UK rank out of 50 nations 2008-2014

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

With these figures in mind, VisitBritain commissioned a piece of research to further explore the views of those who had visited or were considering a Britain bound holiday. We wished to understand how to make the most of our cultural and heritage offerings whilst maintaining and possibly broadening the wider appeal of Britain with a view to increase the volume and value of holiday visits from overseas.

VisitBritain wanted to understand the role culture and heritage plays in selecting a holiday abroad (and what was particularly motivating), the current positioning of Britain against competitor destinations (strengths of the British offering), how visitors absorb culture and heritage while on holiday and to further understand how best to communicate our offer to potential visitors. As well as an understanding of the topic, the research was designed to provide practical and actionable recommendations. Be on the lookout for the 'top tip' sections of this report for key actionable recommendations.

Introduction

VisitBritain conducted this research into understanding the role of culture and heritage in the top three inbound UK markets in terms of visits, spend and nights – France, Germany and the USA. In 2013, these three markets represented 34% of all overseas holiday visits to the UK, 27% of all spending and a third (30%) of all UK overseas visitors' nights. Below is a table showing the number of visits, spend and nights by each of these markets to the UK in 2013.

Table 2: Holiday visits to the UK from France, Germany and USA

2013	Visits (000)	£ million	Nights (000)
France	1,761	£627	7,341
Germany	1,386	£675	8,481
USA	1,123	£981	8,180
UK Total	**12,726**	**8,448**	**79,294**
UK Proportion from these 3 markets	**34%**	**27%**	**30%**

In 2011, as part of the Office for National Statistics International Passengers Survey (IPS), departing visitors were asked what activities they had participated in during their stay in the UK. Table 3 on the next page shows the proportion of holiday visits that included the activity from each market. While shopping was popular across all markets, those from Germany and the USA were particularly likely to have visited castles, historic buildings and visited a British pub. The final column shows the proportion of visits to the UK from all countries, for comparison.

Table 3: Inbound UK holiday visits which involved activity, 2011

	France	Germany	USA	All UK Holiday
Went shopping	70%	73%	67%	**71%**
Visited parks or gardens	49%	60%	60%	**54%**
Visited castles or historic houses	42%	62%	60%	**48%**
Went to the pub	39%	54%	60%	**50%**
Visited museums or art galleries	43%	44%	53%	**43%**
Visited religious buildings	31%	42%	49%	**35%**
Went to countryside or villages	18%	29%	28%	**22%**
Went to the coast or beaches	13%	27%	15%	**15%**
Went to bars or nightclubs	11%	11%	18%	**14%**
Went to theatre / musical / opera / ballet	6%	10%	22%	**14%**
Attended a festival (e.g. music, food, arts, film)	3%	4%	7%	**4%**
Went to a live sport event (e.g. at a stadium)	2%	2%	3%	**4%**

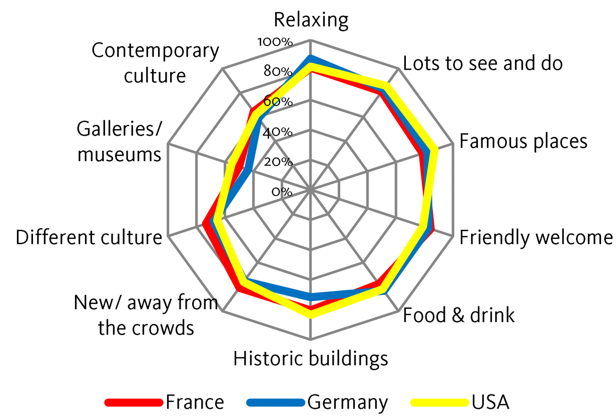
Influence of Culture and Heritage on holiday destination choice

Amongst those who participated in this study it was found that 'culture' and 'heritage' independently invoke different associations, but they are ultimately seen as intertwined. 'Culture' was seen as everything that makes a nation distinct and was often thought of as the more engaging of the two. Culture was often described as 'alive and active' and 'constantly evolving'. Heritage, on the other hand, felt narrower and more retrospective. Amongst these respondents heritage had connotations of looking back to what had been and what had shaped the present. It would therefore be fair to say amongst this group culture is considered something to experience while heritage is something to see/do and they are complementary of each other.

When it comes to selecting a holiday destination culture and heritage was found to be an important element, amongst the mix with other holiday elements. As well as culture and heritage, holiday makers sought out opportunities to relax and destinations offering lots to see and do. This was the case across all three markets in this study. While these might seem contradictory, in reality the research found visitors seek moments of each (relaxing / lots to see and do), not necessarily a holiday entirely focused on one or the other. Other elements considered important in the holiday mix were famous places (buildings and attractions) and expectations of a friendly welcome from the locals.

The chart below shows the extent to which each market included in this study agreed with each aspect – the further towards the outside edge the line appears the higher the proportion of respondents from the market who selected either 'quite important' or 'very important' when selecting a holiday destination.

Chart 1: Important factors when choosing a holiday destination, by market



There were differences noted by market with those from Germany indicating opportunities to relax as particularly important, the French were looking for friendly locals. Respondents from America were generally more positive on all attributes measured than those from France and Germany, but in particular they placed importance on historic buildings.

__Top Tip:__ Consider wrapping culture and heritage alongside other important holiday aspects when promoting British culture and heritage to maximise the appeal within each market.

Current strengths of British Culture and Heritage offering

To understand the current perceptions of the British culture and heritage amongst visitors and considerers within each of these markets, respondents were asked to rate how good they thought the current Great Britain offer was in relation to a number of important holiday factors. Respondents rated each attribute on a scale of 1-10, where 10 was the highest score and represented excellence.

The chart on the following page shows the average score awarded to Britain on each attribute. It is clear Great Britain's strengths are focused on our offering of famous places, historic buildings and opportunities of lots to see and do. Although scoring an average of seven out of ten, food and drink and a different culture were identified as the weaker areas of the British offer.

Individually, all three markets agreed on the top three attributes with 'lots to see and do' in third place. Historic buildings came out top in France and the USA followed by famous places, while those in Germany put famous places before historic buildings.

Chart 2: Average Britain rating of important holiday factors (out of 10)

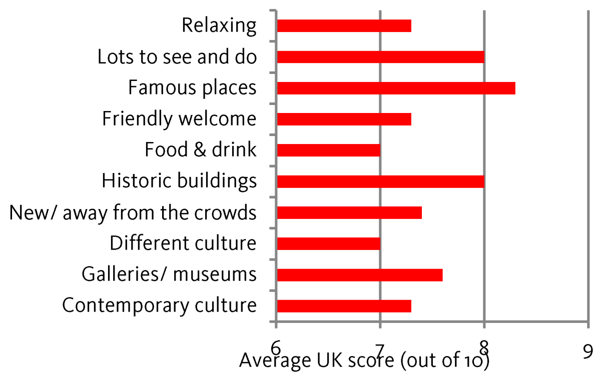


Table 4 below shows the ranking of the holiday factors by market, where first place is highlighted in green through to tenth in red. French respondents ranked opportunities to get away from the crowds in fourth place with different culture fifth – ranking both attributes higher than those from Germany and the USA. Relaxing came in fifth place behind Museums and Galleries amongst those from Germany while those in the USA generally awarded higher scores across all holiday attributes measured with friendly welcome in fifth.

Table 4: Britain ranking of important holiday factors, by market

	France	Germany	USA
Historic buildings	1	2	1
Famous places	2	1	2
Lots to see and do	3	3	3
Galleries/ museums	7	4	4
Friendly welcome	9	7	5
Contemporary culture	8	6	6
Food & drink	10	9	7
Relaxing	6	5	8
New/away from the crowds	4	10	9
Different culture	5	8	10

Competition

Knowing the strengths of Great Britain within each market is helpful, but for context it is important to understand how the British culture and heritage offer is viewed compared to other competitor destinations. To understand how Britain stacks up compared to other holiday destinations respondents were asked to rate six of other nations on the important holiday attributes. The competitor set in this study was defined as Italy, Spain, Ireland, Netherlands, USA, and France. To enable comparisons those in France and USA were not asked to rate their own country.

By comparing Britain's rank with that of other nations we can see Britain performs well on the tangible and rational holiday elements:

- Historic Buildings – 3rd
- Famous places – 3rd
- Art Galleries/museums – 4th

But ranks less well on the emotive and immersive holiday promise:

- Lots to see & do – 5th
- Friendly welcome – 6th
- Relaxing time – 7th

Within this tough competitor set it was Italy who lead the way on most attributes, although perceptions of Ireland's relaxing offer and places away from the crowds saw them clinch top spot on these attributes. It was Spain who led the way for culture (both contemporary and different) with France taking first place for art galleries and museums.

The role of Culture and Heritage while on holiday

When speaking to the groups of respondents in the USA, Germany and France it was clear from the discussions that visitors and those considering a holiday look for a variety of things from a culture and heritage holiday. As well the tangible elements, visitors sought promises of emotional connections from a holiday. These are not specific to British holidays, but apply to the idea of an ideal international holiday. Holiday makers seek experiences that are different and distinct from their everyday life – in particular there are 3 criteria visitors will use when deciding on a destination:

Emotional Impact: Visitors described seeking intriguing experiences on their holidays. They sought experiences which promised chances to be amazed and opportunities to be emotionally moved and inspired. They spoke of seeing in reality what they had seen on TV or had read about. They already had some ideas of what it might feel like and were seeking the opportunity to make a connection in reality.

Immersion: this was expressed by respondents as 'sharing with the natives' and definitely not participating as a spectator. There were aspirations for experiences to feel real, genuine and authentic. On holiday visitors were seeking out unique experiences, avoiding contrived offerings which could appear 'put on for the tourists'.

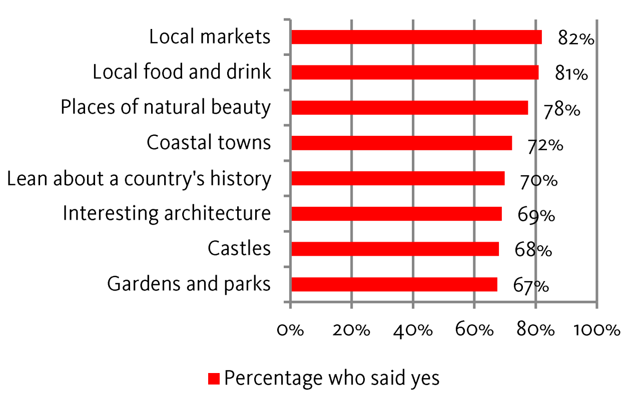
Different Experiences: Visitors sought opportunities to learn about a country's culture, history and local/native people as these are thought of as different to home; different to their everyday. While on holiday, visitors were looking for opportunities to learn about themselves (spiritually) and about the destination (intellectually).

Top Tip: Inform and reassure potential visitors of an emotional connection while on holiday in Great Britain. Offer authentic experiences that are different to their everyday life that also encourage visitors to participate and feel included.

Opportunities to absorb Culture and Heritage while on holiday

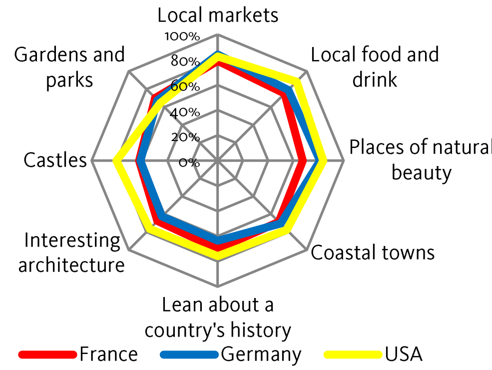
Specific cultural attractions and historical sites are one way visitors absorb culture and heritage on holiday. This research also found alongside specific attractions, experiences can be enhanced with visitors indicating a truly cultural or heritage experience is more than a single attraction. They cited high levels of agreement with a number of statements they would personally like to do on a holiday with local markets and local food and drink topping the list.

Chart 3: Opportunities to absorb Culture and Heritage while on holiday



There were some notable differences by market – see Chart 4. As we saw earlier the further towards the outside edge each line appears on this chart, the higher the proportion of respondents who agreed with the statement. Those from France showed slightly less interest in the places of natural beauty, compared to those from Germany and the USA. Those from Germany were less likely to select learning about a country's history as a way of experiencing culture and heritage in a foreign country. It was those from the USA who showed the greatest interest in all opportunities – particularly castles.

Chart 4: Opportunities to absorb Culture and Heritage on holiday, by market



Top Tip: keep in mind visitors to Great Britain absorb culture and heritage in a variety of ways on holiday. It is not just about a specific attraction but also about additional auxiliary experiences to complement and enhance a visitor's overall experience.

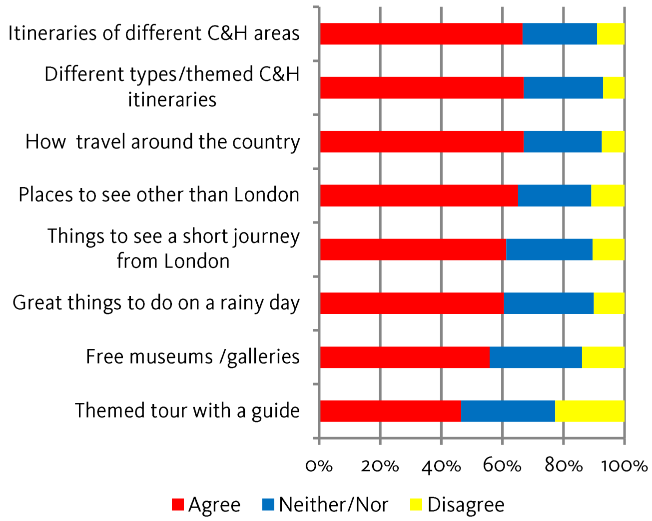
Accessing of British Culture and Heritage

Respondents were asked to select from a list of ideas, the ones they thought would make people more likely to visit Britain for a holiday.

Itineraries performed well with two out of three respondents agreeing itineraries would make people more likely to visit Britain for a holiday. There were high levels of agreement for itineraries of culture and heritage attractions in different areas of Britain, but also attraction itineraries covering different culture and heritage themes. This perhaps points to visitors' thirst for more information where itineraries would be welcomed to help guide visitors to build their holiday itinerary. Due to the depth and breadth of the British culture and heritage it can be overwhelming for visitors unfamiliar with Britain to know what to do and how to pull it all together for their own holiday.

As well as itineraries there were high levels of agreement for more information about travelling around the country – both how to practically reach places as well as the cost of getting around. Furthermore, around two thirds of respondents agreed more information on the places to see outside the capital city (65%) and things to see a short journey from London (61%) would make people more likely to visit Britain for a holiday. See Chart 5.

Chart 5: Aspects more likely to make people visit Britain for a holiday

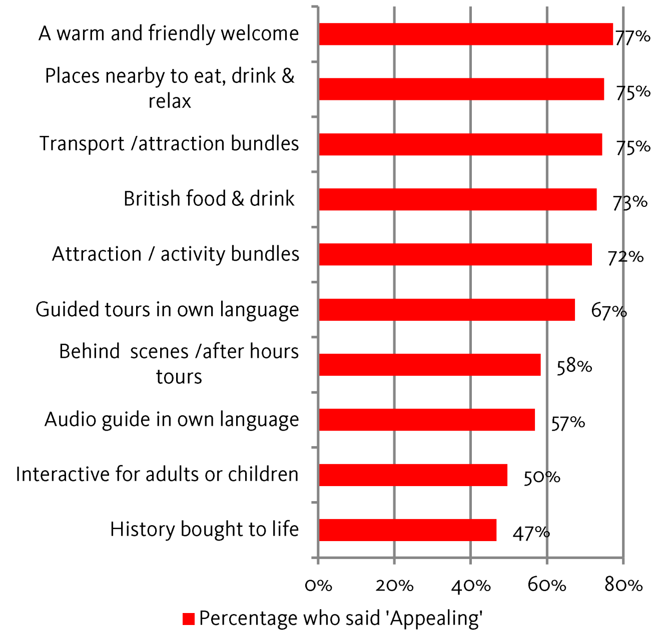


<u>Top Tip:</u> **Itinerary suggestions would be welcomed by a large proportion of visitors to help build their own culture and heritage holiday, overcome any perceived practical challenges and therefore visit Britain. Places outside the capital and things to see within a short journey were suggested as appealing to visitors.**

Promotion of British Culture and Heritage

Respondents were asked to think specifically about what cultural and heritage attractions could do to encourage more visitors to help inform and guide future marketing communications. As well as the more fundamental aspects of welcoming staff and places to eat and drink the people in this survey also suggested bundles to attract more visitors. Both bundles for transport & attractions and bundles of multiple attractions & activities received high levels of agreement. In terms of food and drink, local British offerings were thought to be appealing. See chart 6 for the complete list.

Chart 6: Encouraging more visitors to cultural and heritage attractions



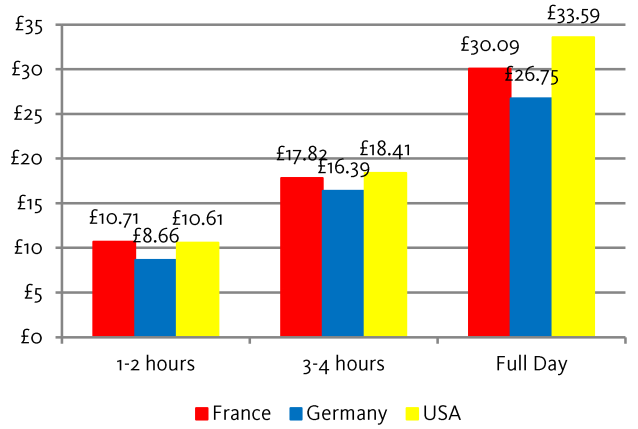
<u>Top Tip:</u> **ensure marketing and communication materials include information about other nearby options for visitors. This might include opportunities to try local food and drink, transport hubs or similar complementary attractions and activities that could be combined into an entire visitor experience.**

Expected price to pay for attractions

As well as ensuring Britain's cultural and heritage offer appeals to both visitors and those considering a future holiday to Britain it is important the cost of attractions are aligned with visitor expectations.

Respondents were asked to indicate roughly how much they would expect to pay, per person to visit an attraction. They were asked to give an amount based on the length or duration they expected to spend at each attraction. Respondents answered in their own currency, which was then converted to British pounds for Chart 7 on the next page.

Chart 7: Average price visitors expect to pay for an attraction, by experience length



While the results show respondents from each of the three markets had similar price expectations across the time bands tested, it was the Americans who were the most likely to expect to pay a higher price for attractions more than 3 hours in duration. For the shorter 1-2 hour attractions it was the French who had the highest expectations. In general, visitors and considerers from Germany had the lowest expectations of attraction prices, regardless of duration.

Further Information and research

VisitBritain has various research reports and statistics covering a variety of topics including a specific Culture and Heritage report. This report includes chapters for Built Heritage, Cultural Heritage and Contemporary Culture. One page summary documents of the results of this study for market are available on our website on each market page France, Germany and the USA. An all market overview is also available.

Working with the Association of Leading Visitor Attractions (ALVA), VisitBritain presented the key findings of this research in September 2014. More details of this event including the presentation given by the research agency commissioned to complete this study (HPI) is available on our website under our recent activity section.

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

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

Details of the study

The research included in this edition of Foresight was conducted by HPI Research at the beginning of 2014 in three markets – Germany, France and the USA. The research objective was:

To understand and provide actionable recommendations for leveraging Britain's key asset – culture and heritage – in the most effective way to grow inbound tourism

The study was conducted in two steps:

Firstly nine qualitative workshops were held – three workshops in each market, with a mixture of **visitors** to Britain (those who had visited Britain for holiday/vacation for at least 2 nights in the past 10 years) and **considerers** (respondents who had taken a holiday/vacation abroad in the past 5 years but had not previously visited Britain).

In addition to attending a workshop, participants were required to complete a set of pre immersion tasks which ensured participants had ample opportunity to consider materials and allow for in depth discussions at each session. The workshops were held in Hamburg, Paris and New York.

Following completion of all nine workshops a quantitative survey was set up and run to validate the qualitative results. The sample was split evenly between of visitors and respondents who were considering a holiday in Britain. The online survey was designed to take 20 minutes and was run in field during April 2014. In total 1,503 responses were collected as follows:

Table 5: Sample Breakdown

Source	France	Germany	USA	Total
Visitors	251	251	251	753
Considerers	249	251	250	750
TOTAL	500	502	501	1,503

At the end of the quantitative fieldwork the data checked, validated and then weighted to match the nationally representative profile of each market's population for age and gender.

Please note the participants in this research needed to consider culture and heritage as important when deciding where to visit for holiday/vacation, but culture and heritage was not the main or only holiday/vacation motivator for these folk.

Data Sources

Source	Charts/Tables
Office for National Statistics, International Passenger Survey, 2013 (unless otherwise stated)	Table 1
GfK Anholt Nations Brand Index, July 2014	Table 2 and 3
HPI, Leveraging our Heritage and Culture (commissioned by VisitBritain), 2014	All other tables and charts

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