



Audiences London

Cultural Tourism Resources

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Audiences London presents
Wish you were here ...
Cultural Tourism Symposium
for arts and heritage in London
Tuesday 25 May 2010
10am - 5.30pm - Tate Modern

with support from
VISIT LONDON
visitlondon.com

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Key facts and figures

“Culture and heritage is the most important part of Britain’s tourism offering as it touches every visitors’ trip to Britain. VisitBritain estimates that culture and heritage attracts £4.5bn worth of spending by inbound visitors and underpins more than 100,000 jobs in Britain. Additionally, it is the single most important motivation for city trips. Whilst most wouldn’t classify themselves as cultural tourists, 57% of respondents from 20 countries agreed that history and culture are strong influences on their choice of holiday destination. According to the Nation Brands Index, in terms of Culture, the UK is perceived to be the fourth best nation out of fifty.”

Visit Britain insights and statistics on culture and heritage

<http://www.visitbritain.org/insightsandstatistics/segmentssectorsandissues/cultureheritage.aspx>

London is the world’s leading city for international tourism and is the city most visited by overseas visitors

<http://bit.ly/btz2Wl>

1. Visit Britain sponsor a question in the Nation Brands Index 2009

- Ranked 5th overall for tourism
- 57% of respondents from 20 countries agree that history and culture are strong influences on their holiday destination choice
- 62% are keen on seeing famous and well known locations
- 66% want to explore new places away from the crowds
- Ranked 4th best nation for vibrant and exciting cities
- Ranked 8th highly aspirational destination to visit

Contemporary Culture

- 4th best nation out of 50 for 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.
- 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.

- The UK is strongly associated with film, music, pop videos, and modern design
- 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
- 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.
- 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.
- 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.

Cultural Heritage

- 7th best nations for rich cultural heritage out of 50 nations – most highly regarded in the USA, Australia, Canada, South Africa Poland, Argentina, and Russia
- The Chinese 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
- (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.
- Going to a pub in Britain is 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
- 8th best nation for excelling at 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

- 18-24 year olds regard football as a top priority, and it is also very appealing for 25-34 year olds. It is less appealing to the 35+ age group. 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.

Built or Historical Heritage

- 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
- 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
- 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.
- 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.
- Sometimes Britain is perceived as being like a museum. 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. 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.

Nation Brands Index

<http://nation-branding.info/2009/10/07/nation-brands-index-2009/>

2. The London Visitor Survey

7 out of 10 visitors to London are attracted by the culture offering.

The London Visitor Survey

http://www.visitlondonmediacentre.com/facts_figures/london_visitor_survey

The London Visitor Survey is produced for the London Development Agency by TNS Travel and Tourism,

and is designed to improve understanding of the London visitor experience. It aims to identify the strengths and weaknesses of London as a visitor destination and to track visitor satisfaction with the capital over time. This is achieved through face to face interviews with both international and domestic visitors to the capital.

The London Visitor Survey is conducted among the following visitor types:

- **Overseas** visitors
- **UK staying visitors** (UK residents who live outside Greater London and are staying at least one night in the capital)
- **Day visitors** (those on trips of 3hrs+ not taken on a regular basis), including:
 - **UK day visitors** (UK residents who live outside Greater London and are not staying overnight)
 - **London residents** (live in one of the 33 London boroughs)

The following are a few statistics taken from the 2009 annual report:

Influences on decisions to visit London

	% who responded v. important or important	Type of visitor
Theatre/music/arts performances	53%	London residents
	60%	Overseas visitors
	60%	UK staying visitors
	52%	UK day visitors
Museums/galleries	61%	London residents
	84%	Overseas visitors
	70%	UK staying visitors
	63%	UK day visitors
History/heritage	76%	London residents
	92%	Overseas visitors
	83%	UK staying visitors
	80%	UK day visitors

Sources of information used **before a visit**:

- 42% Guide book/maps
- 40% Knowledge from previous visit
- 25% Advice from friends and relatives

- 34% other internet (not Visit London)

Sources of information **during a visit:**

- 60% Guide book/maps
- 20% Advice from friends and relatives

3. Local Borough Tourism Figures

To find out about the impact of tourism on your local Borough use the Local Area Tourism Impact (LATI) model which takes London-level data from the major national surveys (International Passenger Survey, UK Tourism Survey) and new data on day visitors from an omnibus survey, and distributes it across the boroughs. This approach provides top-line figures for the volume and value of tourism, broken down as business & leisure <http://www.lta.gov.uk/server.php?show=ConWebDoc.2577>

4. Tourism and London

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

- London receives 25m overnight visitors annually
- Tourism in London is worth £16bn to the economy
- 200 million day visitors come to London annually
- 250,000 + jobs are created by tourism in London

London is a gateway to the rest of Britain

- 75% of all visitors to the UK come through a London airport
- 47% of all visitors to the UK stay in London
- In 2009 London accounted for over 50% of all overseas visitor spend in the UK
- More than half of the top ten charging attractions in the UK are in London

London is a world cultural leader

- More museums than Paris or New York
- More theatres than New York or Shanghai

- More music performances than New York
- 200 festivals a year
- 47 major rock and pop venues

Culture is a key strength for London

- “Culture” is already a core appeal and key driver of visits to London...
- 84% of overseas visitors say museums and galleries influenced their decision to come to London
- 60% say the same for music, theatre and arts performances

If cultural tourists are a priority target audience for your organisation, Audiences London can offer a surgery session to support your organisation to define its objectives, refine your messages for target groups and use your resources effectively.

For more information about Audiences London’s resources or services please contact:

Email: info@audienceslondon.org

Tel: 020 7 497 4625

Or visit the services section on the website www.audienceslondon.org