

MAYOR OF LONDON

TAKE A
CLOSER
LOOK

A CULTURAL TOURISM VISION
FOR LONDON 2015 – 2017

Take A Closer Look

Cultural Tourism In London

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Welcome by the Mayor



What makes London the best city in the world to visit?

Is it our world-class theatre, our free national museums, our eye-opening art galleries, historic royal palaces, vibrant markets, or the abundance of green spaces across the city? It's all of these things and more.

Four out of five visitors already tell us that 'culture and heritage' are their main reasons for coming to London. Indeed, cultural tourism generates £3.2 billion a year for London's economy and supports around 80,000 jobs. London & Partners, our official promotional agency for London, continues to do a great job to promote our city around the world, with visitor numbers at an all-time high.

However, we cannot afford to rest on our laurels. London is competing with other cultural destinations around the world – Amsterdam, Paris, New York and Berlin have all put culture centre stage in their promotional strategies and, as a result of their success, London has to work hard to maintain its international position.

We have also learnt that 90 per cent of visits here in London are to the top 20 cultural attractions, so our visitors are perhaps not aware of the full range of things on offer across the capital. London is also a gateway to the rest of the UK so encouraging visitors to stay longer and visit another UK city while they are here will give the entire country a real boost.

If we are to remain a world capital of culture, we must stay ahead of the game. That means bringing the tourism and culture worlds closer together to make sure visitors are able to enjoy the fantastic range of cultural activities right across our great city.

We have also learnt that cultural visitors increasingly want more authentic, personal experiences from their travels. Luckily London is well placed, from hit West End musicals to cutting edge theatre, from world class opera to heavy metal gigs, from ancient Egyptian artefacts to provocative contemporary art, from historic pubs to pop-up restaurants – this city has it all.

As more and more visitors come to London, we must give them the chance to experience the breadth and depth of London's cultural eco-system. This includes our major world-class cultural institutions as well as the hidden gems. The visitors of tomorrow will have even more reasons to come here with Olympicopolis, the new cultural hub in east London, and a magnificent new garden bridge across the Thames.

We all have a role to play and personal tips and local recommendations can be just as influential as a great guide book. So, maybe next time you see someone with a map struggling to get their bearings, why not point them in the right direction and give them a recommendation of your own!

Boris Johnson
Mayor of London



Foreword by Neil MacGregor

The British Museum is the most visited antiquities museum in the world. Tate Modern is the most visited modern art gallery in the world. The National Gallery is the most visited paintings gallery in the world. All are free, all embrace many cultures and all play a real part in the daily life of the city.

For 250 years London has collected and studied the world and made the collections and the research on them available to everyone. The great London collections are the perfect expression of London's constant openness to the whole world. As the city collected the objects of the world, it also welcomed the people of the world. Every London community can find its own culture, past and present in the public collections. This is why every tourist to London will find something familiar as well as being able to explore the whole world in this one city.

London is one of the most connected cities in the world, easily accessible to the UK and the globe. Digital and social media now enable London's cultural organisations to reach out to a global public and develop relationships with each individual before they even set foot in the capital.



There are many global cities but only in London can you meet the people from all over the world and with them enjoy the music and theatre they make, the food they eat and see the astonishing range of great and wonderful things they have made. London, we all know, is an expensive city. It is also a uniquely generous one. Amongst the great global cities only in London are all the national museums, like the parks, free to all for recreation and inspiration. If you are a visitor to London, they belong to you.

Neil MacGregor
Director of the British Museum



A cultural tourism vision for London

We want more cultural visitors to come to London.

We want them to be inspired to explore the rich diversity of London's culture.

We will do this by telling fresh stories and by working better together to promote the best city in the world.



Welcome to London

AGATHA CHRISTIE'S
The Mousetrap
50th YEAR

COME UP

IN A HOUSE ON THIS SITE
SAMUEL PEPYS,
DIARIST,
WAS BORN,
1632 - 1703

JIMI HENDRIX
1942-1970
Guitarist and
Singer
Lived here
1968-1969

VIBES

PLATFORM 9 3/4

ON THIS SITE
SERIES 176
NOTHING
HAPPENED

Welcome to London

“London goes beyond any boundary or convention. It is illimitable. It is Infinite London.”

Peter Ackroyd, London: The Biography (2000)

Since the first pilgrim tourists came to medieval London, the capital has been a source of inspiration, enjoyment and connection.

Today, London’s tourism is in a very strong position. The city welcomes around 30 million visitors a year from around the world and the UK. Together, they spend over £14 billion.

Unlike other host cities post-Olympics, London’s kept the flame alive. The city attracted a record breaking 16.8 million overseas visitors following London 2012 and last year Mastercard put the city ahead of Bangkok and Paris as the world’s most popular tourist destination.¹

From London: The Biography by Peter Ackroyd, published by Chatto & Windus. Reproduced by permission of The Random House Group Ltd.

Tourists don’t really come to London for the weather. What does attract them is culture. London has some of the best museums, galleries and theatres in the world. With over 300 languages spoken here, London is also a place that welcomes and values international arts and culture – as much as celebrating our own.

Another legacy from the Games for visitors and Londoners alike was the creation of Queen Elizabeth Olympic Park. This huge urban park will also host east London’s ‘Olympicopolis’, a new world-leading culture and education quarter which will redraw the city’s cultural map.

As ever, London is a city that refuses to stay still.

All of this is why we believe...

London is the best cultural destination in the world

We may be slightly biased, but the facts speak for themselves.

For first time tourists, the ‘must see list’ includes iconic places like Buckingham Palace, Big Ben, Piccadilly Circus and the Tower of London. Then there’s popular cultural experiences like a visit to the National Gallery or going to a West End show. These draw huge numbers of people to London.

For repeat visitors who want something new, London has more to see and do than almost anywhere else in the world. Indeed, it’s even a challenge for Londoners to enjoy all the city has to offer.

London maintains its ongoing popularity by having ‘lots of things to do’² and a huge range of things on offer. Visitors can experience ancient and modern, sometimes right next to each other. London is the world’s number one city for its sheer variety of historical sites and museums, as well as its culture and leisure activities.³

“London has an incredibly rich cultural offer and is central to why overseas visitors come here. As a result, it forms a major part of our leisure tourism marketing activities.”

Gordon Innes, Chief Executive, London & Partners

¹ Source: Mastercard Global Cities Index report 2014

² Source: VisitBritain Leverage Culture and Heritage research 2014

³ Source: Why London, 2012. London & Partners.



London has all the ingredients for success

London has a powerful infrastructure for cultural tourism: the people, the passion, the places and a growing appetite for more collaboration across the city in both the culture sector and its tourism industry.

Nationally and regionally, following the joint Visit England and Arts Council England partnership in 2013, cultural tourism is being recognised as a valuable tool for regeneration. In London, many essential partnerships and networks are already in place. There's strong support from the top and at a grassroots level to make this vision a reality.

“London is now clearly the European capital of art. The city has a more exciting range of galleries, museums, artists and collectors than its rivals, and this is the reason our art fairs, Frieze London and Frieze Masters, have attracted so much attention and attendance. From antiquities, through old masters, modern, and contemporary art, there is always something exciting to see in the city.”

Matthew Slotover, CEO and Founder, Frieze



Going further, together

We want to find ways for the worlds of culture and tourism to work better together.

This will help to make London even more attractive, ensure visitors have a fantastic time when they're here and also make the city even better for people who live here. However, we can't do it alone.

At the moment, our official promotional agency London & Partners has a tough job.

Although it punches well above its weight with limited resources, international competition to attract overseas visitors is fierce and London must continue to up its game.

We need to understand the different types of cultural visitors, why they come to London and how we can inspire them with our amazing cultural offer. That means not taking our cultural assets for granted and London & Partners will continue to promote our flagship cultural institutions and experiences that are such a big draw, particularly in our biggest tourist markets.

We can also do so much more collectively to raise the awareness of London's wider and lesser known cultural offer. Highlighting other cultural attractions along with places to eat, shop and relax nearby can help tourists discover more of London and have a great day out.

By working together, we can make the most of cultural tourism in London.



Henry III received 'a white bear' (believed to be a polar bear) from King Haakon of Norway in 1252. The bear was one of the luckiest animals kept at the Tower of London as it was given a long leash so it could swim in the river Thames and catch fish.

How London & Partners promote the capital internationally

London & Partners is the official promotional company for London. We are a not for profit, public private partnership, funded by the Mayor of London and our network of commercial partners. Our purpose is to deliver jobs and growth for London by attracting investment and visitors.

London's world class cultural offering is one of its strongest selling points and plays a central role in London & Partners' promotional work. In 2014, we piloted a marketing campaign which shone a spotlight on the amazing cultural offer taking place during autumn in London. The accompanying film was viewed one million times, reached 70 million social media accounts and was covered in over 100 articles and broadcasts around the world. We plan to repeat the campaign.

Culture is also core to our wider leisure tourism marketing activities. Last year, we gave 140 million potential visitors an insider's view of London in The London Story including many of its cultural attractions. These attractions are also central to our recent marketing activity, called 'London's Official Guest of Honour', which has generated over 1,000 articles and broadcasts worldwide and is expected to reach 250 million

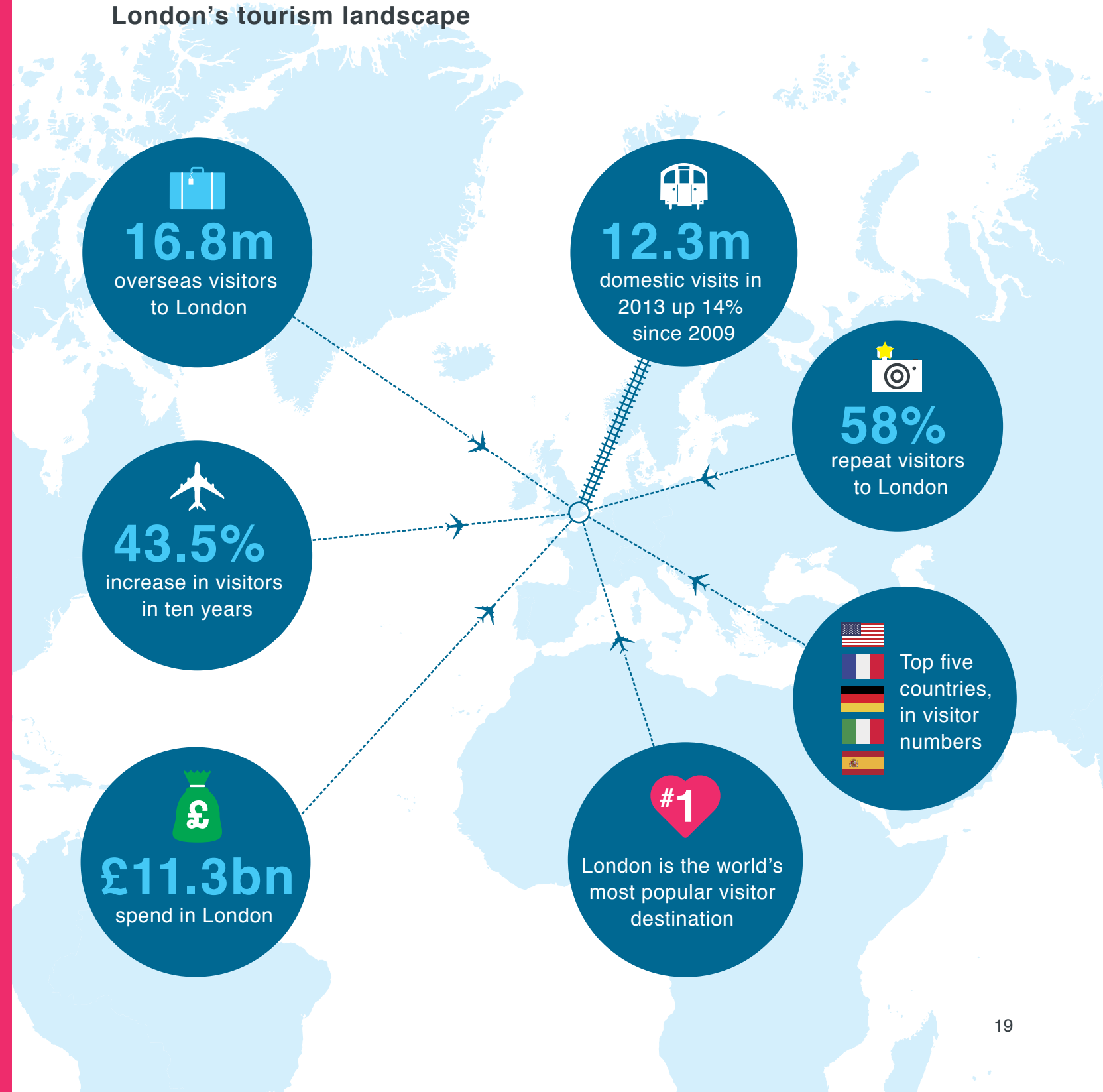
potential visitors. The promotional film, alone, has already been viewed 6.5 million times.

We also manage a number of valuable, digital channels, including social media, apps, blogs, e-newsletters and the hugely popular visitlondon.com. This website receives 27million unique users each year and contributes over £100 million in added value to the London economy. Visitlondon.com is now the most influential source of information for overseas visitors to London's museums and galleries ⁴ and it contains a comprehensive listing of all cultural events and venues across the capital.

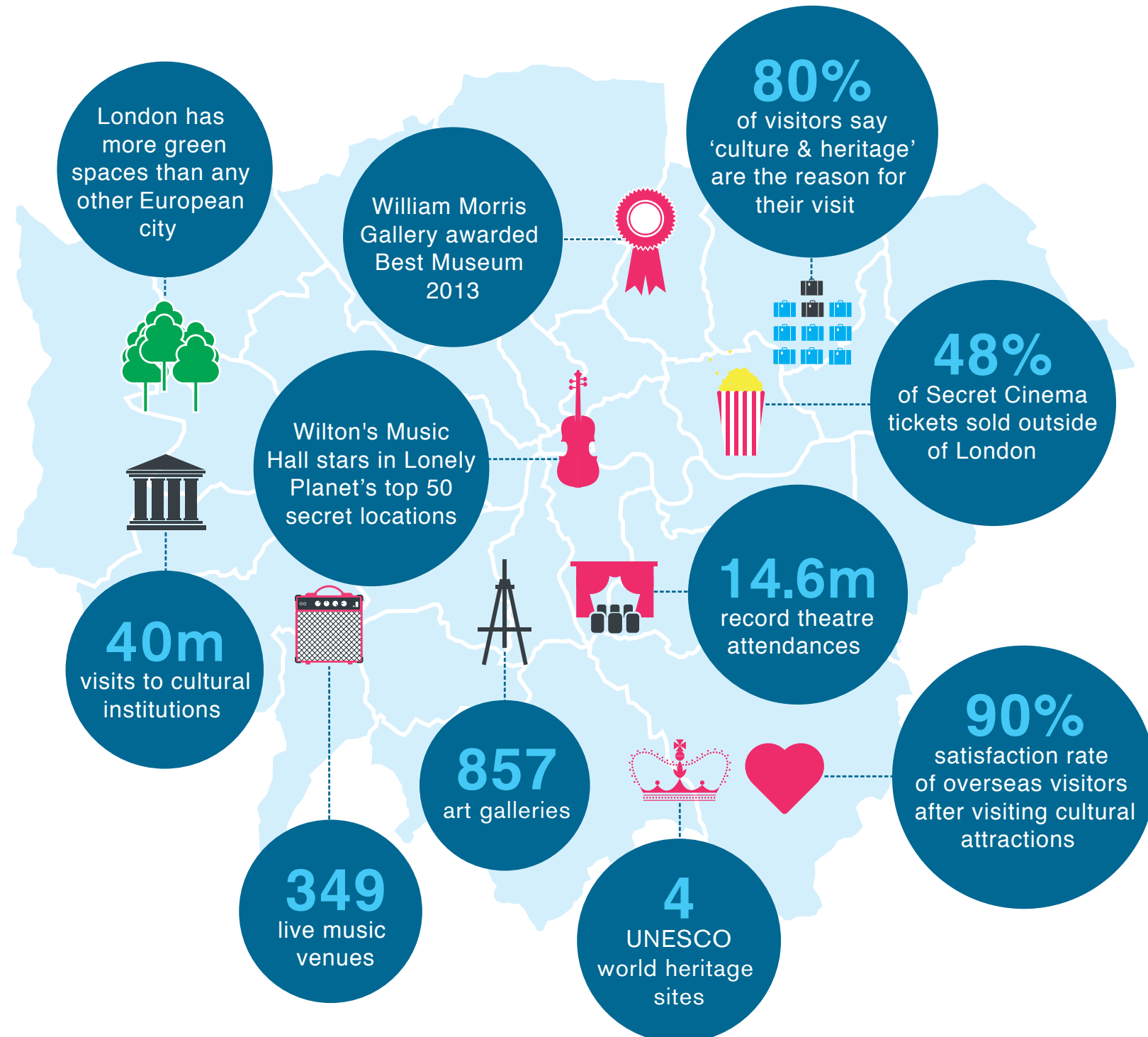
London & Partners works with around 1,100 businesses and institutions across the tourism and cultural sectors, including major museums, theatres and venues. We also feature smaller venues and events in our digital and social channels.

⁴ Source: Morris Hargreaves McIntyre

London's tourism landscape



London's cultural landscape



What is cultural tourism?

Both 'culture' and 'tourism' alone can be tricky to define. Put them together and there's a whole other set of interpretations.

The World Tourism Organisation defines cultural tourism as:

'all aspects of tourism that can teach visitors about their past and inheritance, as well as their contemporary lifestyles.'

To compare, New York City defines cultural visitors as 'tourists who participated in at least one cultural activity during their visit' and this includes overseas visitors and day trippers travelling from 50 miles or more.

In this report, we define 'cultural tourism' as a broad engagement with London's arts and entertainment offer, both free and paid. It includes: museums; galleries; theatres; music; dance; comedy; exhibitions; fashion; festivals; literature; film; history, heritage and London's architecture and built environment.

It also means visitors are actively taking part in culture and combining this with tourism (food and drink, hotels, shops... and the people they meet) in a way that's authentic and means something to them.

We also recognise the influence of heritage and culture on how 'attractive' a city is. For example, while visitors may only have time to do a few of these things during their stay, the knowledge that they could do so much more makes the collective cultural offer more attractive. And it encourages visitors to return again and again.



St Pancras Old Church in the mid-1860s was where a young Thomas Hardy worked before he started writing. He helped excavate the graveyard for the railway construction. The moved tombstones were put together and a tree grew in the centre. It's now known as the Hardy Tree.

Cultural tourism is growing, quickly

Cultural tourism now accounts for 37 per cent of world travel and is growing fast – at a rate of 15 per cent year on year.⁵ London & Partners, the Mayor’s official promotional agency, already actively promotes London’s cultural offer internationally. If harnessed in the right way, cultural tourism could offer huge long-term value to London and inspire and motivate more repeat travel across London.

“Cultural tourism is not a quick fix, or business decision or really even a strategy. It’s about passionate interest and connection to culture. This is what drives our business and it’s why we do what we do. Most of our clientele are cultural tourists. Our whole brand is based upon this cultural exchange”.

Ryan Bukstein, Chief Cultural Engineer,
Ace Hotel, Shoreditch

⁵ Tourism and Intangible Cultural Heritage 2012,
World Tourism Organisation



In-between writing no.1 albums, singer-songwriter and Tottenham native Adele worked behind the counter at the Rough Trade record shop in Notting Hill.



Photo: © Frieze London 2014

WELCOME TO THE CITY OF LONDON



Welcome to the City of London

Established soon after the Romans invaded Britain in AD43, the City is situated at the very heart of London and is the place from which modern-day London grew.

Today, the City is the world's leading international financial business centre, further enhanced by its rich history, cultural heritage and natural beauty.

Cultural tourism is worth a lot to London

£7.3 billion
spent by cultural visitors

£3.2 billion
economic impact

80,000
jobs supported⁶

⁶ GLA Economics 2015

Who are cultural tourists?

There are five types of cultural tourist.

Here they're ranked in terms of how important and how relevant they are to London.

Most visitors to London are likely serendipitous and sightseeing cultural tourists. These are the bedrock of London's visitor economy. However, as this report will show, there is a big growth of purposeful cultural tourists to London. A new generation of visitors who like to explore further, stay longer and spend more, whether they're visitors from overseas, the UK or London.

“I can have culture in America, I can have culture anywhere. What I really want to see is the distinct, unique, varied part that makes it different to everywhere else... what makes somewhere distinct.”

USA serious considerer, VisitBritain's Leveraging our Heritage and Culture research 2014

⁷ Based on McKercher B. and H. du Cros, Cultural Tourism: The Partnership between Tourism and Cultural Heritage Management (2002). The Haworth Press, Binghamton, New York (2014).

Types of cultural tourists

1. **Purposeful cultural tourist:** for these highly motivated and early adopters, culture is their main reason for choosing a destination. They want a deep cultural experience.
2. **Sightseeing cultural tourist:** culture is one of the main reasons they visit, but their experience of it is not as deep. They might be business tourists, students, or knowledge tourists.
3. **Serendipitous cultural tourist:** don't travel specifically for culture but are interested in seeking out experiences and, ultimately does have a deep cultural experience. They're part of the mass tourism market already visiting London.
4. **Casual cultural tourist:** culture is not a motivation for their visit and as a result, they don't have a deep cultural experience.
5. **Incidental cultural tourist:** this type of tourist does not travel for culture, but does engage in some very light touch cultural experiences.⁷



What do cultural tourists want?

In a word: authenticity.

Increasingly, today's cultural tourists are looking for more than just the tick-box attractions. They're after genuine experiences that are memorable and 'brag-able'. VisitBritain's recent research into making the most of Britain's culture revealed that, when prospective overseas tourists were asked to describe their ideal holiday they use words like 'authentic' and 'discovery' as well as 'relaxing'.⁸

More and more often, they're looking to experience distinctive, 'local' culture, too. Destinations like Amsterdam, Paris and New York have already recognised the pull of the 'local' as a distinctive tourism experience.



In its 600 years of serving punters, The George Inn near London Bridge has welcomed both Charles Dickens and William Shakespeare amongst its regulars. Not at the same time though obviously.

⁸Leveraging Our Culture Report 2014, HPI Research for Visit Britain

How do they find what they're looking for?

How tourists discover culture is also changing, with technology, independent digital media and even tourists themselves taking the lead. Of the 15 million Twitter users in the UK, one in three use it to search for local events.

Visitors to London can now get instant recommendations from friends via social media, and curate their own itineraries via websites and apps like Culture Whisper and YPlan. Visitors also search for information and inspiration on sites like the official destination website VisitLondon.com as well as established independent sites like Time Out London and Londonist. They draw on the cultural tourism content from a variety of blogs and lifestyle sites, increasingly commissioned by commercial partners including Transport for London (for example, the recent 101 Things to do in London campaign), AMEX and Mastercard.



Piccadilly Circus got its name from London's menswear heritage. In 1626, Robert Baker, a tailor famous for selling piccadills (a large broad collar) named his house Piccadilly Hall on the site of the now famous West End thoroughfare.

“It's that discovery element people love. Right now, there's thousands of people looking for things to do in London. The whole market wants to be more spontaneous nowadays. People want to be able to do something very quick and very convenient. They don't want to search through a list of 100 things on different websites; they want it all served up in a personalised way and to be able to book it conveniently in two taps.”

Peter Briffett, Chief Operating Officer, Y Plan

The digital world and the growth of the shared economy are changing how visitors choose to stay in London. Cultural visitors now have lots of different accommodation options across the whole city. One of these is Airbnb, which gives visitors the chance to stay in people's homes.

Snapshot of Airbnb – the growth of authenticity seekers

Interview with Holly Clarke, Acting Country Manager at Airbnb

Airbnb is an online community marketplace that connects people who want to rent their homes with people who are looking for accommodation. Since it started in 2008, Airbnb has hosted over 30 million guests across the world, with over 15 million in 2014 alone.

Outbound Airbnb travel from the UK has increased 121 per cent over the past year, while inbound travel's gone up 141 per cent. Two thirds (23,000) of the country's Airbnb hosts are based in London.

Why does it work for London's cultural tourism offer?

Most Airbnb guests say they want to 'live like a local' and two thirds enjoy visiting cultural attractions and experiences. Because they've saved on their accommodation, they stay longer and spend almost double the average UK visitor.

Who are the guests?

Airbnb guests are adventurous and earn an average of £50-70k. They're looking for authentic experiences and open to staying in unusual places and out of central London. They are mostly repeat visitors and half of international guests come from the USA, with France, Germany and Australia also strongly represented.

How does Airbnb support cultural tourism?

With 72 per cent of host properties outside the main hotel districts, Airbnb guests really experience the unique culture of towns and neighbourhoods. Many hosts are 'creative' types. So for example, Airbnb can help link designers visiting for the London Design Festival with designer hosts.





New York City

Profile with Fred Dixon, CEO, NYC & Company

What does New York City do?

NYC & Company is New York City's official marketing, tourism and partnership organisation.

New York City is made up of five boroughs and tourists are more and more understanding the scope and diversity of the city's complexity.

NYC & Company continues to spotlight authentic, live-like-a-local experiences across the five boroughs via its Neighborhood x Neighborhood programme. Through our global marketing and communications efforts, we always work to showcase our iconic cultural icons as well as our hidden gem institutions across all five boroughs.

Brooklyn is now established on the world's stage (alongside Manhattan). But there's also Staten Island, the Bronx and Queens, which has been named the No.1 Best destination in the US to travel to in 2015 by Lonely Planet. Part of what we do in our storytelling and our content, especially through social media and digital channels is to constantly raise awareness of the scope of what goes on in New York.

Visitors consistently tell us what resonates is the fact that if I can't see it anywhere else, if it's unique, only for this time, urgent then I will go. And that really is one of the key definers of these institutions that they have, very often that uniqueness and depth and interest.

Our job is to convince you that you haven't seen it all and it's worth repeat trips. You're not going to deter a first-time visitor from hitting those landmarks. The goal of a marketing agency like ours is to help them to do that, but then convince them that they need to come back and do more and that it's constantly changing. One of our most successful campaigns is called Arts on Tour where we link up with touring arts programmes, whether it's visual or performance and we use their international tour as a billboard for promoting New York.

The figures

New York City had 55.8 million visitors to the city last year (using a slightly different model to London to define cultural tourists which includes day trippers travelling from 50 miles or more). Cultural Tourists account for 27.6 million of these (those who joined in at least one cultural activity during their visit – museums, live performances, visual arts, theatre etc).



So, what does London offer a new generation of cultural tourists?

In a word: authenticity.

If you tried to picture ‘authenticity’ as a city, it would be London.

London’s long been a cultural pioneer. From contemporary artists who re-imagine the Fourth Plinth in Trafalgar Square to the world famous festivals like the Notting Hill Carnival, Frieze Art Fair, BFI London Film Festival and the London Design Festival. All accentuate the city’s eclecticism and international appeal. The British Council’s report on soft power agreed that the UK’s creative and innovative arts are influential qualities for prospective visitors.⁹

London’s cultural icons will of course always be a ‘hook’ for first time tourists and an important part of our appeal. But what about repeat visitors who want to discover the new things to see and do and are willing to go the distance to experience them?

Juxtaposing large and small; old and new together, gives the cultural tourist exactly what they want and draws out a more genuine reflection of the real London. The city’s boroughs have an offer that often fits beautifully with the cultural tourism market and is ripe for development.

Right now, London’s the place to be for immersive theatre, a pioneering cultural experience that often sells out in hours. This prompted the BBC recently to dub London ‘the capital of new escapism’¹⁰ due to the success of the likes of Secret Cinema, You Me Bum Bum Train, The Ginger Line, Shunt and Punchdrunk. It tells us that visitors are willing to travel the distance for experiences that are unique and unusual.

More and more institutions are waking up to this potential: you can see it in the growth of ‘Late’ events, which was nurtured by City Hall back in 2007, at many of London’s museums and galleries catering for immersive, one-off and shareable cultural experiences which are a bit different. Success stories are also emerging from cultural gems in outer boroughs like the William Morris Gallery in Walthamstow and Bold Tendencies in Peckham. Niche events are becoming more popular and generating significant economic returns – over half of the 40,000 tickets to Secret Cinema’s Back to the Future events at Queen Elizabeth Olympic Park were bought from outside of London.¹¹

Both music and film also play important roles; the capital accounted for 28 per cent of all music tourism visits to the UK with 1.8 million coming to visit London in 2012¹². Film London's report on the location placement value of screen tourism showed the influence of social media hype surrounding London-shot films. The continued appeal of Notting Hill generated the equivalent of £19.5 million in online ad spend for the capital¹³. Many visits to London have been influenced by a production that features London, from Sherlock to Harry Potter. In extreme cases, some visitors make pilgrimages to film locations with an almost religious fervour (known as shrining) to dressing up as a fictional character with a degree of accuracy that elevates it from fancy dress (known as cosplaying). These visitors are sharing their passions for the world to see.



An opticians in Bull's Head Passage, Leadenhall Market, was the film location used for the entrance to the Leaky Cauldron in Harry Potter and the Goblet of Fire.

“Screen tourism contributes hugely to the brand value of cities that feature in films and on TV. The emotional link that you build with a film or television programme is an experience you want to relive. We don't need a new museum building for this because London is its own film museum we just need to turn the lights on.”

Daniela Kirchner, Chief Operating Officer, Film London

“In London we're set for all the major cultural institutions because you've got everything here. We've got the most amazing museums, galleries and opera and ballet, etc. But what you've also got, out of this creativity, is this other, renegade culture of people doing things differently and starting to attract really big audiences themselves.”

Fabien Riggall, Founder, Secret Cinema

⁹ British Council, The Power of Culture, 2014

¹⁰ Is London the capital of new escapism? November 2014

¹¹ Future Cinema 2014

¹² Wish You Were Here, Music Tourism Report, UK Music, 2013

¹³ Quantifying Location Placement Value Film London and Euroscreen, 2014



Secret Cinema's Back to the Future Photo: © Camilla Greenwell



Car Park Art Bold Tendencies/Frank's Café, Peckham

This creative enterprise is changing perceptions of Peckham. From June to September its mix of food and drink and culture attracts around 2,000 visitors daily to what is normally a car park. Drawing people from other parts of the city, they have developed a partnership with Uber, the taxi app, with discounts for users, and extra discounts for existing Uber customers. Their main promotional channels are very flexible and mobile – social media, e-communications and PR (both national and international). The food and drink offer in conjunction with the cultural offer has proved important – creating a social community based on shared experiences.

Victoria & Albert Museum

The V&A has always attracted tourists, but recent exhibitions – David Bowie Is in particular – have proved to be game-changers. Thirty per cent of visitors were new to the V&A through that exhibition. New applications of technology have enhanced the visitor experience, for example Bowie recorded trail, live national screenings, digital and mobile interpretation. International tours of exhibitions like Hollywood Costume, are carrying the brand to target markets.

The V&A Lates are also creating different London communities and neighbourhoods. External programming partners have responded to the collections and the very different atmosphere that can be created in the evening – cross-art form, informal, accessible and fresh. It's attracted many locals, but there is clear potential to appeal and attract tourists more over time, building on their UK regional partnerships (including Museums Sheffield, and the forthcoming V&A Dundee, and Queen Elizabeth Park plans) and internationally (notably China).





Tim Arthur, Group CEO, Time Out

We choose to write for cultural tourists, 20 per cent of our online audience of seven million unique visitors are tourists. Our biggest out of London/non UK markets are the USA and Europe and increasing traffic in China.

We are a passionate advocate for the city and our mission is to make people have a better experience of the city (and 66 other cities). We cover the biggest, the best and the new and we stand as a trusted voice. We're hyper local but global in perspective.

We're looking at reaching out into social media more with blogger ambassadors, striking a balance between Time Out editorial and these individual, independent voices – real people who know their role and specialism with their own opinions.

Digital means that we can more accurately find out audience needs so we can build packages based on 'search'. We are starting to talk about individuals and personalisation and are constantly creating new search terms and trends. Time Out is a focusing lens, a filter through the white noise. We're building a national network across the UK with London as the hub but tapping into the richness across the country.



The Anchor Bankside pub on the South Bank of the Thames close to Southwark Cathedral is where diarist Samuel Pepys saw the Great Fire of London in 1666.

But...

The UK's slipped down the world ranking for 'culture'

The 2014 Nations Brand Index rated the attributes of 50 countries. It found that the UK's appeal for 'a rich cultural heritage' is still high and it has moved up to third in terms of being seen as 'Interesting and exciting for contemporary culture'. However, the UK's overall ranking for 'culture' has slipped to fifth place due to "other countries improving at a faster rate on these attributes compared to the UK visits."¹⁴

Other cultural destinations are upping their game. New York has seen a 50 per cent increase in cultural visitors over the past decade¹⁵, the 'I amsterdam' campaign is one of the most successful destination brands on social media¹⁶, Paris has made a concerted effort to revitalise its contemporary art scene, Berlin's tourism success, founded on an edgy cultural profile, makes it the envy of other European cities racing to position themselves as the "new Berlin" – cheap, fun and creative – continues¹⁷.

These are yet more reasons why London needs to promote itself as a leading cultural destination, and why we must continue to evolve our offer.

"It is important to this country that London is the best experience in the world; that it is the attack brand for the UK. Our capital city is already a world class destination but cannot and will not rest on its laurels. Promoting a multi layered offer can only work to strengthen its appeal."

James Berresford, Chief Executive, Visit England.



For just a shilling, 54 people gathered in the Regent Street Theatre to see the pioneering Lumière brothers' Cinématographe screen the first performance of moving images to a paying British audience. Visitors were said to have stepped back in alarm as a train hurtled towards them. As the curtain fell British cinema was born.

¹⁴ VisitBritain Foresight November 2014

¹⁵ NYC & Company. From Research to Marketing: Inside Cultural Audience Behavior

¹⁶ www.eyefortravel.com/social-media-and-marketing/what-i-amsterdam-letters-teach-us-about-destination-branding-social-media

¹⁷ www.newrepublic.com/article/119394/new-berlin-rise-and-fall-cool-cities



We can do more to expand our cultural offer to tourists

London's top 20 attractions account for 90 per cent of visits.¹⁸

The big icons dominate cultural marketing of London. They act as important headlines that grab attention and provide the motivation for a visit. Inevitably, resources to promote cultural organisations large and small are limited and tourism agencies often have to focus on attractions that can generate mass visits. However, London has an incredibly rich, diverse offer for visitors beyond these top 20 attractions. See the Top 20 London visitor attractions list in the Appendix 2.

So the question we'd like to answer is 'How can all the stakeholders in London help cultural tourists get beyond the headlines, discover these lesser known gems and experience the real London they desire?'

"We need to address the 'long tail' – both of visitors and institutions – by getting tourists to smaller, less well-known venues and away from the usual suspects. We need to spread the visitors out and share the love."

Roger Walshe, Head of Public Engagement and Learning, The British Library



¹⁸ Annual Survey of Visits to Visitor Attractions, 2013

Half of cultural organisations don't promote internationally¹⁹

Even some of our larger cultural institutions don't promote themselves overseas. This can often be due to limited promotional budgets and resources. However a lack of awareness of the tourism promotional opportunities is a factor too.

There is also great potential to help shine a light on London's smaller cultural organisations and raise awareness of the more authentic and lesser known places that cultural visitors want to visit.

“As an outer London museum, we found at the William Morris Gallery that international press coverage can have a huge impact on awareness and visits. After featuring in Dagens Nyhete, a Swedish daily newspaper, our front of house team noticed a distinct increase in Swedish visitors to the gallery.”

Lorna Lee, Head of Cultural and Community Services,
London Borough of Waltham Forest

¹⁹ Greater London Authority Cultural Tourism Surveys 2013 and 2014



London's infrastructure is under pressure

In the next 15 years London's population will top ten million, with increasing numbers of both residents and tourists putting strain on services and transport.²⁰ Major museums and galleries that already experience peak-time congestion have strategies to manage this but increasing numbers of visitors who pour through the cultural doors can strain resources by rarely straying beyond zone 1.

“London's expansive and efficient public transport network is at the heart of a visitor's experience of London. We know the experience of public transport has a positive impact on how visitors view the city. Our research has shown that most visitors currently stay within zones 1 and 2, especially during their first stay in the city. We would like to encourage more visitors to explore the breadth of London's exciting cultural offer, particularly during quiet times of the day. Our services provide all visitors with the means to travel across all areas of London, experience the capital's cultural gems and make every visit unforgettable.”

Chris Macleod, Marketing Director, Transport for London

²⁰ The London Plan, Spatial Development Strategy for Greater London, 2011



Visitors think our culture and heritage is too expensive

You don't often hear the phrase 'London is good value for money'²¹.

Yet, tourists visiting the national museums in Paris, Rome and New York are paying an entrance fee while in London they are all free. Visitors to the London 2012 Olympic Games were pleasantly surprised by London's value for money, a fact that saw the city's attractiveness rocket as a result²². This is a message that can be used to encourage more cultural tourists but one that is, at the moment, stymied by out of date perceptions and negative media coverage.

“London is my favourite city on the planet – it's the cosmopolitan and 'melting pot' feel of it all, the open-mindedness to difference and culture. And the whole city is a world-class museum, outdoors and indoors.”

Producer and artist Will.i.am, aka William Adams

²¹ The Cost of Culture Report, Post Office Travel Money, 2014

²² City Brand Index, 2013





Visitors and Londoners aren't fully aware of our cultural offer

London's cultural scene is rich and varied. Its scale is massive; Time Out London estimates that the capital hosts thousands of events every single day in its 33 boroughs.

However, research by Maggie's Culture Crawl shows that 38 per cent of UK visitors say they feel they miss buildings and areas of interest because they're not aware of them and only 31 per cent of Londoners feel they really make the most of the culture on offer on their doorstep.²³

We have a great opportunity to entice more visitors to venture further as well as encouraging Londoners to take greater advantage of the cultural riches in their city.

“Being in London is a very competitive market there are lots of main attractions in central London and it's a challenge for tourists to understand the connectivity.”

Fiona Stones, Head of Culture and Tourism,
Royal Borough of Greenwich

²³ Maggie's Culture Crawl, Research of 2146 UK adults carried out by Opinion Matters 2014



Where to next?

2. Better understand the facts

There are clear gaps in our knowledge of cultural tourism and its economic benefits; we need to know much more about visitors' preferences, decision-making and purchases.

London's best prospect tourist markets are based on overall market growth potential through to 2020; we know that according to the World Tourism Organisation, cultural tourism is one of the fastest growing segments. However we lack the detailed information to enable us to target the best prospect cultural tourist in the growth markets. In this respect, market research has to catch up with the market.

There are a number of models and research on the segmentation of UK cultural audiences, including the Cultural Segments model by Morris, Hargreaves & McIntyre and the Audiences Agency's Audience Spectrum. However, currently there is no extensive international research on the segmentation of international cultural tourists.

How?

These are just some of the questions that we need to address:

- Where do cultural tourists in London go?
- What is their awareness of London's broader cultural offer?
- How can we get other tourists like business travellers to experience London's cultural offer more?
- What role can Londoners play?

We will:

1. Publish a white paper on the value of cultural tourism to London
2. Review the opportunities to commission new research to fill in the knowledge gaps
3. Share insights and information across the wider culture sector and tourism industry
4. Commission new Mayor-led tourism research in 2015

“Most of our audiences are from London and the South East but Hamlet (starring Benedict Cumberbatch) ticket buyers were more national and international – we didn't need to do any marketing, Sherlock did the job for us!”

Leonora Thomson, Director of Audiences and Development, Barbican

Where to next?

3. Amplify the voice of London culture

With 90 per cent of visits going to the top 20 visitor attractions, it's time to shout about the breadth and diversity of London's cultural experience²⁴. We must make sure that, collectively, we provide the right information, to the right type of visitors via the best channel.

How?

We will:

1. Create a new pool of rights free images and content to portray London's modern day, dynamic cultural offer to provide to a tourism partners and international media and travel trade.
2. Raise awareness of London's diverse cultural offer by working with larger cultural institutions to nurture collaborations and champion smaller organisations.
3. Improve the visibility of cultural events and activities in London's outer boroughs.

²⁴ Annual Survey of Visits to Visitor Attractions 2013, ALVA

“If you're wandering around London, you get a real sense that lots of exciting things are happening creatively and culturally — especially in east London. There are so many different things to enjoy; so many different types of music, venues, and people. That excitement and energy is really palpable, and really attractive to tourists visiting the capital.”

Dorothy Levine, Director of Public Relations, UK Music



Where to next?

4. Enhance the storytelling and enhance the experience

London's an ever-changing city where even the most famous icons like the Tower of London can be monumentally transformed by art.

We want potential first time and repeat visitors to London to not just think about it, but visit. So we will work closely with different partners to develop new ways we can tell London's cultural story and support an enhanced cultural experience for visitors when they're here.

How?

We will:

1. Set up a new cultural content planning framework to strategically promote the big cultural moments and major events on the London calendar.
2. Generate themed and location based itineraries and packages specifically aimed at cultural tourists.
3. Link in cultural tourism messages with major creative industry events and capitalise on the media appeal and PR coverage of these events.

4. Integrate a mix of London's cultural events and festivals that create a distinct sense of place in the destination content. These range from established ones like Totally Thames festival and the London International Festival of Theatre to recent newcomers like Hackney Wicked festival, future attractions like the Garden Bridge and the new east London cultural destination – Olympicopolis.

“London needs to change from an ‘always there’ to a ‘can’t miss that’ destination, driving demand through interest and a sense of immediacy.... This can only really be driven by the contemporary and innovative experiences on offer.”

Simon Bradley, Marketing Director US, Virgin Atlantic

“One size doesn't fit all, if you always promote the same thing, the visitors' awareness of what we offer never changes. We need to use iconic flagships as hooks to draw visitors into what lies behind them. The key is to deliver an authentic and engaging experience whether it's promoting the familiar in a surprising fashion or capitalising on events that add a sense of urgency to travel now.”

Joss Croft, Marketing Director, VisitBritain





New storytelling – Dylan Jones, Editor, GQ and London Collections: Men

This is a golden era for London in all creative areas at the moment, especially fashion.

The UK is now a viable competitor to international cities renowned for fashion. The fashion industry contributes more to the UK economy than the car industry and menswear is now growing faster than womenswear.

London Collections: Men is more than just a fashion show, it encourages designers to come back to London, with over 100 events, including events open to the public mirroring the trade events.

We have been, and will continue to, work with both the culture sector and tourism partners to celebrate London as the home of menswear and reveal the city's 400 years of heritage up to its standing as the most stylish city in the modern world.

Fashion attracts huge media attention, opening this up as a broader cultural message is a win-win and heritage and contemporary together is what London is about and it allows us to maximise these stories from the catwalk to the street, whether that's Savile Row or Shoreditch.



Blood Swept Land and Seas of Red, Paul Cummins and Tom Piper

London has a long held a reputation for pioneering cultural projects that attract international acclaim and media coverage, and increasing numbers of cultural tourists.

However, during the summer of 2014, this installation of 888,246 ceramic poppies at the Tower of London, all individually hand-made in Derby and Stoke-on-Trent, offered a pivotal place to commemorate the centenary of the First World War.

It drew over five million visitors, provided poignant pictures reflected on TVs and newspapers around the world, generated millions for charity. The project showed how artists can provide fresh perspectives on world events and the powerful combination of London's traditional heritage offer with contemporary creativity that can resonate around the world.

Where to next?

5. Maximising the benefits

London needs to be better positioned as the gateway to the rest of greater London, as well as across the UK. We need to not only increase the length of stay and volume of repeat visits, but also dispersal.

How?

We will:

1. Position London as a gateway to the UK's cultural tourism offer. Working with London & Partners and VisitBritain to promote regional exploration.
2. Work with Transport for London to better communicate the ease of traveling to cultural attractions and events across the capital.
3. Work with the Team London ambassadors and local Business Improvement District (BID) visitor guides to raise the awareness of popular and less known cultural events and attractions.

“You get big contrasts very quickly... London and then one hour later you're in a totally different place, in the country and free from the cities.”

Prospective German visitor from VisitBritain's research 2014





Action plan

Action plan

Short term – six months

Actions	Date	Partners	Mayor's role	Cultural tourism objective
A new cultural tourism steering Group to develop this vision and ensure it delivers for London.	Ongoing	Association of Leading Visitor Attractions, Airbnb, Bold Tendencies, British Council, Heritage Lottery Fund, London Councils, London & Partners, Museum of London, Southbank Centre, Transport for London, Time Out, VisitBritain, London Borough of Waltham Forest	Convener	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London's culture
A series of workshops for culture and tourism industries to meet and learn from each and develop partnerships.	2015	London & Partners, London Councils, VisitBritain	Lead	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London's culture
Economic white paper on the Value of Cultural Tourism .	March 2015		Lead	<ul style="list-style-type: none"> – Knowing the facts

Actions	Date	Partners	Mayor's role	Cultural tourism objective
Cultural Tourism Toolkit. Sharing tips and best practices with both culture and tourism sectors.	Summer 2015	London & Partners, London Councils, VisitBritain	Lead	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London's culture
Local content on VisitLondon.com. Showcasing the cultural content of boroughs across London.	Summer 2015	London & Partners, London Councils, Transport for London	Partner	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London's culture – Don't just think it, visit

Action plan

Mid to long term – six months to two years

Actions	Date	Partners	Mayor's role	Cultural tourism objective
Commission new London visitor research study on UK and international visitors to London.	2015	London & Partners, Transport for London, VisitBritain	Lead	<ul style="list-style-type: none"> – Better understand the facts – Maximising the benefits
Produce a new cultural tourism image pool of rights free cultural images and content for press, travel trade use.	2015	Association of Leading Visitor Attractions, London & Partners, British Council, VisitBritain	Support	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London culture – Enhance the storytelling and enhance the experience
' Always on ' digital activities on visitLondon.com, social media channels and PR services that showcase cultural attractions, icons and festivals to visitors.	Ongoing	Cultural institutions and partners of London & Partners	Support (Lead-London & Partners)	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London culture – Enhance the storytelling and enhance the experience
Develop new cultural tourism projects that facilitate collaborations and help improve the awareness of London's wider cultural offer for tourists and Londoners alike.	2015 / 2016	London Councils, London & Partners, Transport for London, cultural organisations, tourism businesses and media partners	Lead	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London culture – Enhance the storytelling and enhance the experience – Maximising the benefits

Actions	Date	Partners	Mayor's role	Cultural tourism objective
Run leisure marketing campaign showcasing major cultural attractions to drive tourism to London.	2015	Cultural institutions and partners of London & Partners Greater London Authority, National tourism bodies, Visit Britain, Great Campaign	Support (Lead-London & Partners)	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London culture
Deliver a new London's Cultural Season initiative . A celebration of the blockbuster exhibitions and events for visitors coming up in autumn each year.	Autumn 2015	Cultural institutions and partners of London & Partners, Visit Britain Great Campaign	Support (Lead-London & Partners)	<ul style="list-style-type: none"> – Connecting the dots – Amplifying the voice of London culture
Assess and evaluate the success of 2015-16 activities against objectives. Identify new opportunities for future deliverables.	2017	London Cultural Strategy Group, London & Partners, British Council, VisitBritain	Lead	<ul style="list-style-type: none"> – Better understand the facts – Maximising the benefits

Appendix 1

Consultations

Between January and September 2014, the Mayor's culture team and its appointed consultants Creative Tourist carried out a series of consultations across the culture and creative industries, the tourism industry and local government.

Personal consultations

ACE Hotel	London Collections: Men
Airbnb UK and Ireland	Manchester International Festival
ALVA	Museum of London
Argent	National Theatre
Arts Council England	NYC & Company
Association of British Orchestras	Queen Elizabeth Olympic Park
Barbican Centre	Royal Opera House
Bold Tendencies	Secret Cinema
British Council	Serpentine Gallery
British Library	Society of London Theatres
Camden Council	Southbank Centre
Create London	Stratford Rising
Discover Children's Story Centre, Stratford East	Stage Text
Festival No.6	Tate
Film London	The Audience Agency
Folkestone Triennial	Totally Thames Festival
Frieze Art Fair	Time Out
Historic Royal Palaces	Transport for London
Hounslow Council	UK Music
London 2012 Festival	Victoria and Albert Museum
London International	Virgin Atlantic
Festival of Theatre	VisitBritain
London Theatre Consortium	VisitEngland
London & Partners	William Morris Gallery
	Wilton's Music Hall
	YPlan

Survey consultations

Art on the Underground	London Parks & Gardens Trust
Camden Town Unlimited	London Symphony Orchestra
Capital & Counties	London Town Tours
City of London Corporation	MBNA Thames Clippers
Corinthia Hotel	Museum of Brands
Criterion Theatre Trust	Museum of London
Delfont Mackintosh Theatres	Music Tourist Board
Design Museum	Radisson Blu Edwardian
Empire Cinemas	Ragged School Museum
English UK London	Royal Albert Hall
Guild of Registered Tourist Guides	Royal Borough of Greenwich
Handel House Museum	Select Travel Service
Inmidtown BID	Sofitel London St James Hotel
Islington Council	Society of London Theatres
Kallaway	Sutton Theatres
Lambeth Council	The Library and Museum of Freemasonry
London Borough of Bexley	The Ritz London
London Borough of Hillingdon	TheatreBreaks.co.uk
London Borough of Newham	Victoria Business Improvement District
London Borough of Richmond	Wimbledon Lawn Tennis Museum and Tour

Appendix 2

Statistical references for the infographics

London's tourism landscape

A total of 16.8m overseas visitors to London in 2013
(Office for National Statistics)

£11.3bn total expenditure of overseas visitors in
London (Visit Britain)

London is the world's most popular visitor destination
(Mastercard Global Cities Index Report 2014)

Top five countries, in visitor numbers (VisitBritain)

58% repeat visitors to London
(based off the International Passenger Survey from
the Office for National Statistics)

12.3m domestic visits in 2013 up 14% since 2009
(London & Partners and VisitEngland)

Top 20 London visitor attractions, 2013

1. British Museum
2. National Gallery
3. Natural History Museum
4. Tate Modern
5. Epping Forest
6. Science Museum
7. Victoria and Albert Museum
8. Tower of London
9. St Paul's Cathedral
10. Westminster Abbey
11. National Portrait Gallery
12. Old Royal Naval College
13. British Library
14. National Maritime Museum
15. Tate Britain
16. Kew Gardens
17. ZSL London Zoo
18. Houses of Parliament
19. Royal Academy of Arts
20. Royal Observatory, Greenwich

From the Annual Survey of Visits to Visitor Attractions, 2013

London's cultural landscape

London has more green spaces than any other
European city (Greater London Authority)

William Morris Gallery awarded Best Museum 2013
(Art Fund)

Wilton's Music Hall stars in Lonely Planet's top 50
secret locations (Lonely Planet 2014)

40m visits to cultural institutions
(Based on visits made in 2013 to visitor attractions in
membership with ALVA, March 2014)

349 live music venues
(World Cities Culture report 2012, Mayor of London)

857 art galleries
(World Cities Culture report 2012, Mayor of London)

4 world heritage sites
(UNESCO)

14.6m record theatre attendances
(Society of London Theatres, 2014)

48% of Secret Cinema tickets sold outside of London
(Secret Cinema 'Back to the Future' shows, 2014)

80% of visitors say 'Culture & Heritage' are the reason
for their visit (London Visitor Survey, 2011)

90% satisfaction rate of overseas visitors after visiting
cultural attractions (London Visitor Survey, 2011)

Thank You

Firstly to the cultural tourism steering group for helping to develop this vision. To the artists and cultural organisations who continue to make London an extraordinary cultural destination. To the tourism businesses who help millions of visitors to experience it first hand.

Thank you to Creative Tourist for helping to pull all this together, to GLA Economics for all the statistical analysis. Thank you to London & Partners for ongoing support and thank you to all the people who contributed their time, expertise, insights and passions towards this vision.

Onwards we go!

Mayor's culture team.

