Written evidence submitted by the Association of Leading Visitor Attractions

7-10 Adam Street,
London WC2N 6AA

Headline facts.

- **Our Culture, history and heritage are the top motivational reasons to visit the UK, as cited by prospective international visitors.** (fig 2.1).

- **The economic effects of the COVID pandemic hit tourism first, hit it hardest and tourism is the sector that will take the longest to recover.**

- **Those tourism businesses which are ordinarily heavily reliant on inbound visitors are those which will take the longest to recover of all, as their customer market is not likely to fully return until 2024/2025.**

- **For example: overseas visitors represented 86% of all paying visitors to St Paul's Cathedral, London, in 2019, in 2021 they were just 16%. In 2019 overseas visitors represented 51% of all visitors to Tate Modern, in 2021 it was just 3%.**

- **Tourism businesses which are heavily reliant on inbound visitors and which, in many cases, are exactly the cultural and heritage organisations which are the primary reason not just to come to the UK but are the ballast of our 'soft power' and cultural diplomacy, must be supported to survive, recover and repair sustainably so that the UK cultural and financial economies can benefit from their global reputation and strengths.**

The Association of Leading Visitor Attractions.

1. ALVA represents the views and achievements of the country's foremost visitor attractions to Government, the broader tourism industry, business, media and the public.

2. We promote co-operation, networking and information sharing between our members to continually improve the high standards of visitor management and visitor experience provided to the public.

Reason for Submission.

3. ALVA welcomes the opportunity to provide evidence to The DCMS Committee's Inquiry examining how Britain's cultural heritage can be used to promote the country as an international holiday destination and boost the damaged tourism industry.

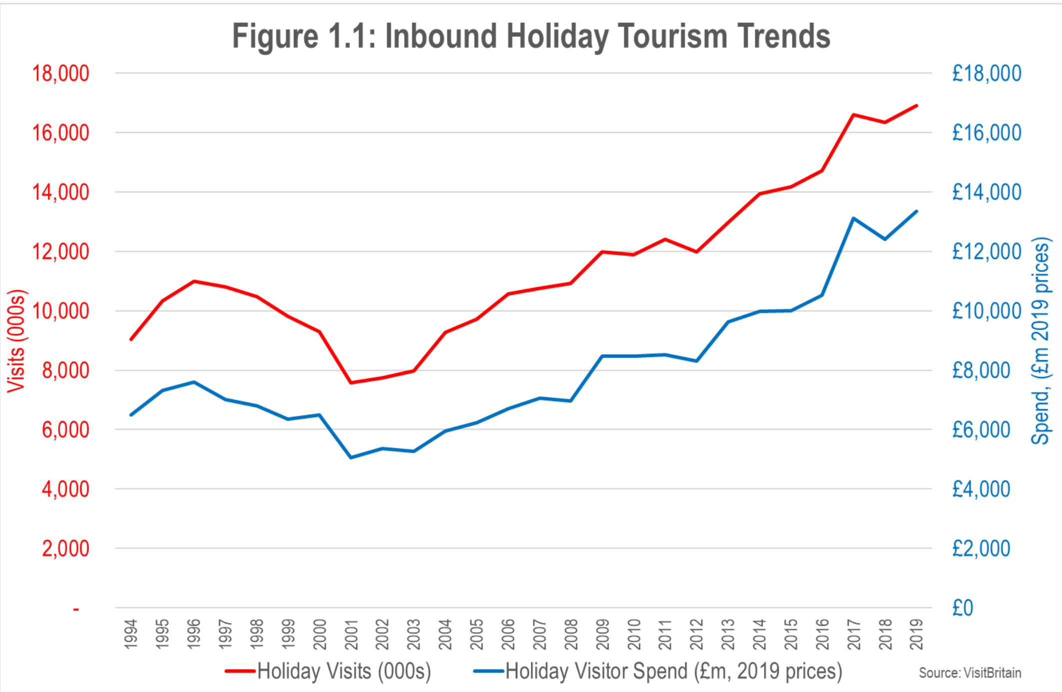
4. The evidence aims to ensure Committee members have a clear understanding of why a safe and speedy recovery for inbound tourism is vital, not just for economic reasons, but for the custodianship of Britain's diverse and unique culture and heritage offering, thereby making these assets available for local communities to enjoy and protecting a crucial drawcard for why overseas visitors choose to visit Britain.

Trends in Inbound Holiday Tourism before Coronavirus.

5. There are many reasons for international travel, whether for work, to visit friends and family or to study, but the focus here is on international visitors who are choosing Britain as their destination - inbound holiday visitors.

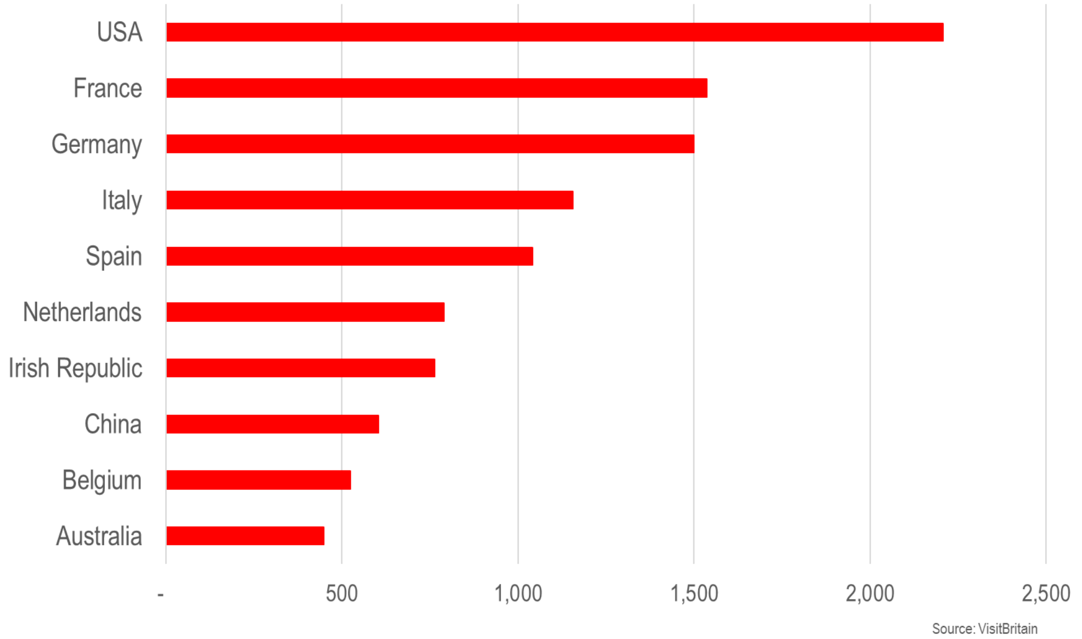
6. This is the market segment tourist board and private sector marketing can most readily influence and should therefore be at the core of promotional activity.

7. Figure 1.1 shows trends in the volume and value of inbound holiday tourism between 1994 and 2019. Over that period there was a near doubling in inbound holiday visits, notwithstanding bumps along the way due to the Asian financial crisis, Foot and Mouth Disease and 9/11. The amount the UK earned from inbound holiday visitors, in real terms, more than doubled (+105%) between 1994 and 2019 to reach £13.3bn, while by contrast UK GDP grew by 67%.



8. Britain has a track record of attracting inbound holiday visits from around the world with Figure 1.2 showing that in 2019 the USA was by far the largest market generating 2.2 million visits. China and Australia are the other long-haul markets in the top ten, but the importance of short-haul European source markets should not be under-estimated, with France, Germany, Italy and Spain delivering in excess of one million holiday visits.

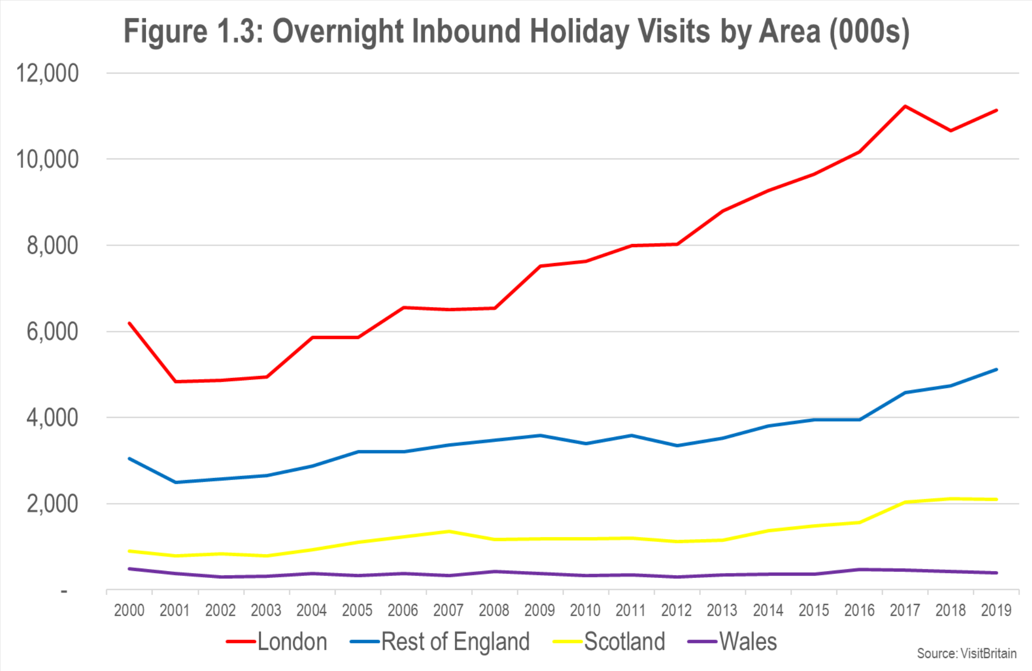
Figure 1.2: Inbound Holiday Visits in 2019 by Market (000s)



9. The markets delivering the strongest growth in the decade to 2019 were the USA (up by 1.2 million) and China (up 0.5 million).

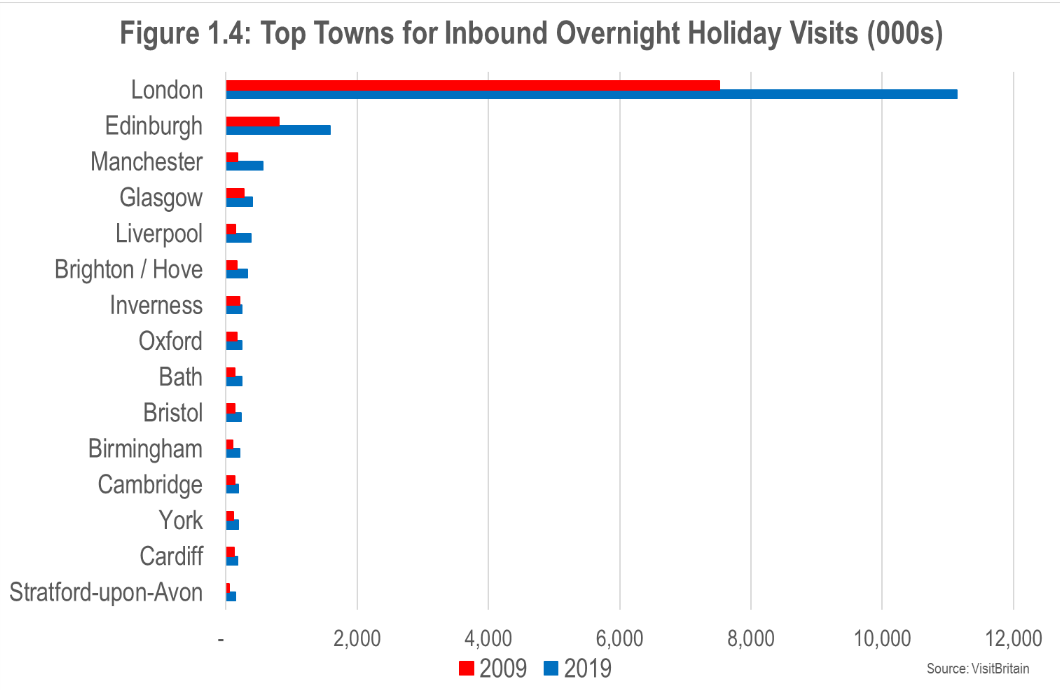
10. It is to be hoped Britain will become re-established as a holiday destination across all source markets, but promotion should focus on markets whose citizens have excellent access to Britain, are attracted by Britain's portfolio of visitor attractions and who are open to the idea of visiting different areas of the country.

11. Figure 1.3 has two key takeaways – first that London represents the cornerstone of why overseas residents choose to holiday in Britain, and second that there has been little change in the regional spread of inbound holiday visits since 2000.



12. It is informative to look at which towns and cities attract the most inbound holiday visits and how numbers changed in the decade to 2019. Figure 1.4 reconfirms London's dominant position, but equally underscores the extent to which destinations with a strong culture and heritage offer feature prominently.

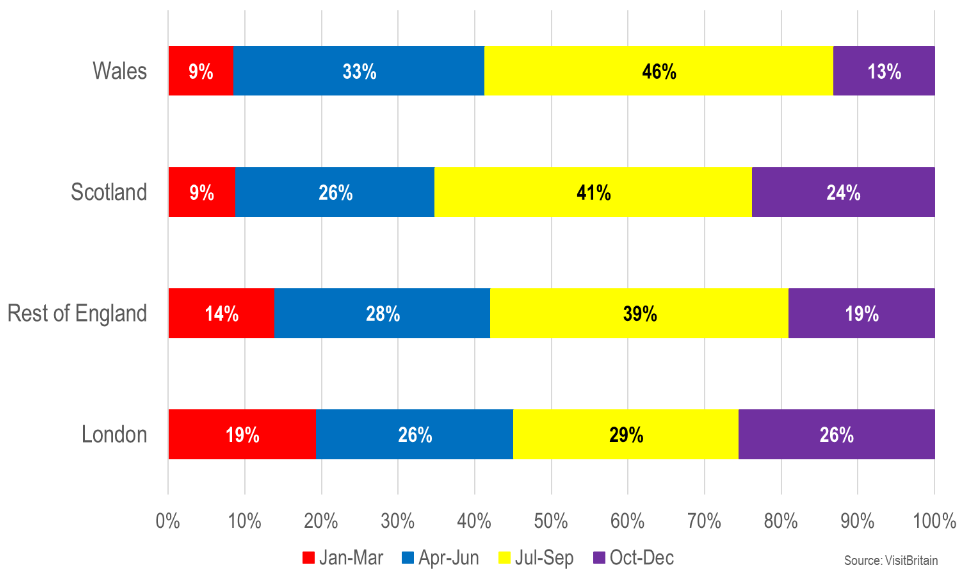
13. An example is Liverpool, where numbers grew from 146,000 in 2009 to 382,000 in 2019, boosted by the city being European Capital of Culture in 2008 and projects to regenerate and diversify the leisure and hospitality offering in the city centre.



14. In rebuilding Britain's inbound visitor economy improving seasonal spread will be vital. It is often claimed tourism is less productive than other economic sectors, in part due to demand being highly seasonal.

15. Figure 1.5 shows the seasonal spread of inbound holiday visits in 2019. London is the most successful at attracting year-round holiday visits while in the rest of England and Scotland two-thirds of visits occur between April and September and in Wales this figure increases to 77%.

Figure 1.5: Seasonal Spread of Inbound Holiday Visits in 2019



The Importance of Culture and Heritage to Tourism.

16. UNWTO defines cultural tourism as "A type of tourism activity in which the visitor's essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions".

17. In its study 'Tourism and Cultural Synergies' UNWTO estimated that globally, based on a broad definition, up to 39% of those taking a discretionary leisure trip could be thought of as 'cultural tourists'.

18. UNESCO in its article 'Bringing Cultural Tourism Back in the Game' makes a compelling case for why those with a stake in promoting a destination should focus on culture and heritage, and illustrates the extent to which Britain's long-standing and emerging tourism competitors are doing just this.

19. Among the benefits derived from cultural tourism cited are:
    - It helps encourage appreciation of and pride in local heritage thereby incentivising investment in its safeguarding
    - It provides a platform for branding a city or region to potential visitors

- It can unlock broader urban regeneration (with Liverpool being an example of this)
- Cities with a vibrant cultural scene are best placed to attract skilled talent boosting local economic prospects

20. Demonstrating the need for Britain to re-energise its promotion of cultural and heritage attractions UNESCO point to how competitive a landscape exists is this arena.

21. France and Spain have long been key alternative destinations to Britain for travellers seeking a holiday featuring rich culture and heritage. In Bordeaux a public-private company oversees public subsidies and tax exemptions to encourage the restoration of privately owned buildings of historic importance. Meanwhile visitor numbers to Bilbao in Spain, not traditionally a honeypot destination, have been bolstered thanks to the Guggenheim museum.

22. But Britain faces a strong new challenge from destinations investing heavily in tourism as a tool for economic diversification.

23. Qatar has a National Vision for 2030 that looks to build a strong cultural tourism offer, building on new signature museums in Doha. Abu Dhabi has a 2030 Plan too, including the creation of a US$27 billion cultural district on Saadiyat Island, comprising a cluster of world-renowned museums, cultural and educational institutions. Another new entrant is Saudi Arabia, where culture and entertainment are seen as a means to diversify the economy.

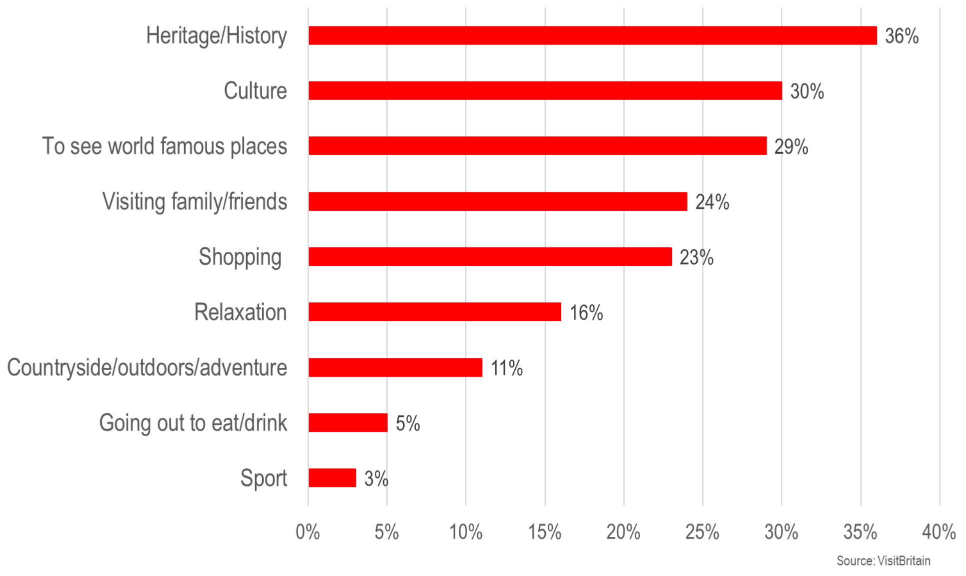
24. For budding outbound tourists in the fast-growing economies of Asia Pacific the Middle East is becoming an alternative destination to Europe for cultural experiences, and can be reached more quickly and more cheaply.

25. Research by VisitBritain ('Foresight' Issue 150) found reasons for opting to visit Britain among potential and past visitors centred on cultural attractions and there being a variety of things to see and do, with 71% agreeing with the statement 'I like to immerse myself in the culture and feel like a local'.

26. But there is more than hypothetical evidence that Britain's cultural and heritage attractions are vital - Figure 2.1 presents results from a question asked of departing holiday visitors on the International Passenger Survey regarding reasons for having chosen Britain.

27. Among the 12,000 visitors quizzed more than one-third cited 'Heritage/History' and 30% 'Culture' as their reason for having visited.

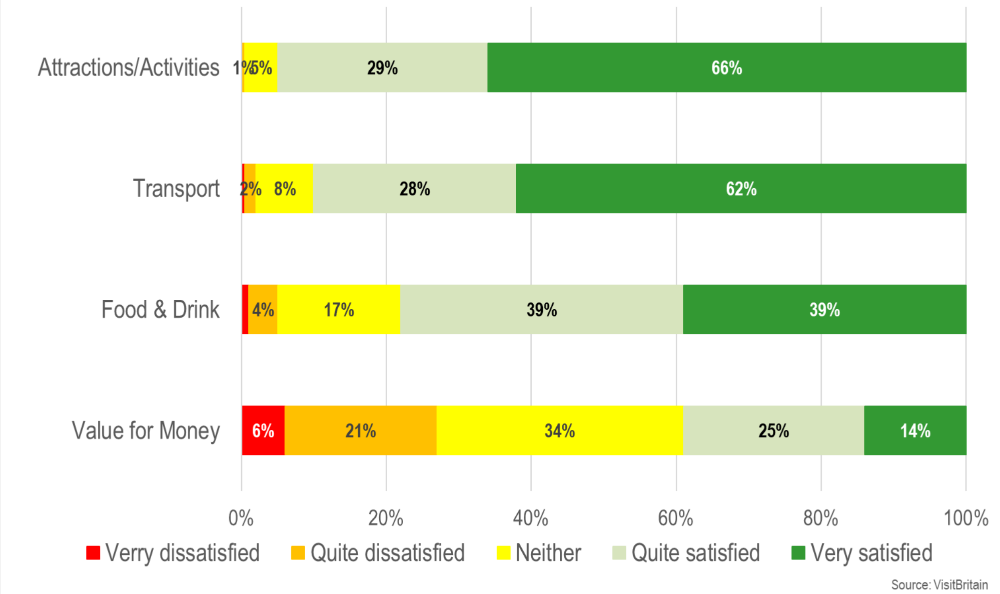
Figure 2.1: Why holiday visitors choose to visit Britain



28. Markets which over-indexed in terms of identifying heritage and/or culture as their reason for choosing Britain offer the most promising options for post-pandemic promotion, including USA, China, Brazil, Australia, France, Germany, Spain and Sweden.

29. This is evidence about 'promise' rather than 'delivery', but data analysed by VisitBritain ('Foresight' Issue 154) presented in Figure 2.2 reveals that when asked about satisfaction with different aspects of their trip holidaymakers were most likely to say they had been 'Very satisfied' with 'Attractions/Activities'. 'Value for money' achieved the weakest satisfaction rating with 6% being 'Very dissatisfied'.

Figure 2.2: Holiday Visitor Satisfaction



30. Table 2.1 shows the propensity for inbound holiday visitors to undertake different activities. 'Dining in restaurants' was the most common activity undertaken, but around half visited a park or garden, museum or gallery, castle or historic house.

31. There is a strong probability inbound holiday visitors will go to a pub, reinforcing the importance of ‘intangible’ cultural experiences - being able to experience life like a local.

Table 2.1: Propensity for inbound holiday visitor to undertake activity

Dining in restaurants	71%
Sightseeing famous monuments	70%
Shopping	69%
Visiting parks or gardens	50%
Visiting museums or art galleries	49%
Visiting castles or historic houses	48%
Going to the pub	46%
Visiting religious buildings	35%
Going on a guided tour	30%
Walking in the countryside	25%
Having a traditional afternoon tea	18%
Going to bars or nightclubs	15%
Walking along the coast	15%
Theatre.musicals/opera/ballet	15%
Visiting a national park	11%
Going to live music events	10%
Visiting literary, music, TV, film locations	9%
Zoo, aquarium or other wildlife attraction	7%
Going to live sport events	5%
Attend a festival	4%

Source: VisitBritain

Perceptions of Britain’s Heritage and Culture.

32. The Anholt-Ipsos Nations Brand Index explores how the world feels about different nations. Results reported by VisitBritain (‘Foresight’ Issue 178) show how, in 2020, Britain was ranked out of fifty nations across key attributes for aspiring visitor destinations. Table 3.1 shows Britain is solidly in the top ten across most measures; 5th for ‘rich in historic buildings and monuments’, 4th for ‘interesting and exciting contemporary culture’ and 6th for ‘has a rich cultural heritage’.

Table 3.1: Britain's rank out of 50 nations

Tourism - overall	**4**
Rich in historic buildings and monuments	5
Vibrant city life and urban attractions	4
Would like to visit if money were no object	5
Rich in natural beauty	23

Culture - overall	**3**
Interesting and exciting for contemporary culture	4
Excels at sport	3
Has a rich cultural heritage	6

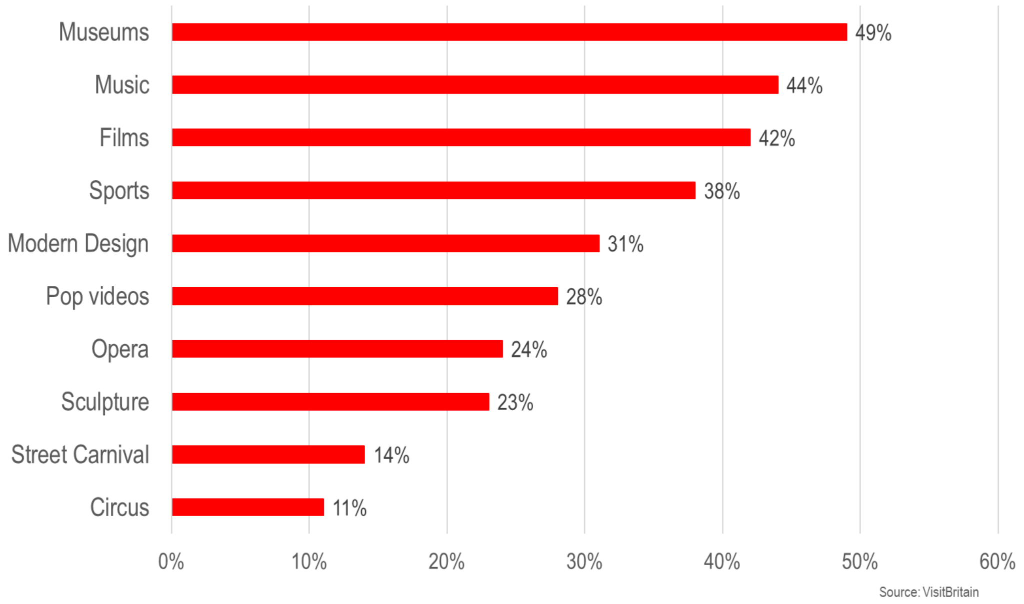
People - overall	**4**
If visited, people would make me feel very welcome	1
1	

Source: VisitBritain

33. The study asks whether a host of cultural products and services are associated with each country and Figure 3.1 shows that close to half associate museums with Britain, ahead of Music (44%) and Films (42%).

34. As potential visitors associate cultural and heritage offerings with Britain and actual visitors are highly satisfied when experiencing the real thing, it's imperative to ensure institutions overseeing these assets are able to maintain their vibrancy, and that marketers dial up the volume in communications relating to cultural and heritage attractions.

Figure 3.1: Cultural product associations



35. ALVA data (Table 3.2) shows the importance of international visitors to the most visited attractions in the UK. The data is for 2019 and reveals that more than half of visits are by overseas residents to all bar one of the top ten London attractions for which information is available. Outside London four among the top ten have an international visitor share of 20% or higher, while in Scotland seven out of the top ten have an overseas visitor share of a third or higher.

Table 3.2: Most visited attractions in 2019 - international visitor share(%)

London

British Museum	56%
Tate Modern	51%
National Gallery	63%
NHM (South Kensington)	65%
Southbank Centre	5%
V&A South Kensington	51%
Science Museum	56%

Tower of London	67%
Royal Museums Greenwich	70%
Somerset House	22%

Rest of England

Chester Zoo	3%
Stonehenge	49%
Roman Baths and Pump Room	40%
RHS Garden Wisley	6%
National Museum Royal Navy	10%
Eden Project	10%
Blenheim Palace	20%
The Royal Shakespeare Theatre and Swan Theatre	7%
Museum of Liverpool	23%
Ashmolean Museum of Art and Archaeology	28%

Scotland

National Museum of Scotland	41%
Edinburgh Castle	66%
Kelvingrove Art Gallery & Museum	41%
Scottish National Gallery	46%
Riverside Museum	36%
Royal Botanic Gardens, Edinburgh	32%
National War Museum, Edinburgh	63%
V&A Dundee	9%
Stirling Castle	67%
Edinburgh Zoo	10%

36. Evidence regarding the importance of international visitors to London's wider cultural offering can be noted in Society of London Theatre analysis showing that in pre-pandemic times close to one-quarter of those in West End audiences were overseas visitors.

37. In Scotland CEBR analysis suggests that once multiplier effects are allowed for The Edinburgh Festival Fringe is worth about £1bn to the local economy, with spending by international visitors vitally important.

Impact of COVID-19.

38. The Committee need little reminder of how impactful the pandemic has been on inbound tourism over the past two years, and it is worth observing that whereas a year ago VisitBritain was forecasting a modest year-on-year increase in 2021 the reality looks set

to be a further decline, with around one-fifth the number of visitors welcomed back in 2019.

39. Furthermore, only weeks after indicating that inbound tourism could recover to 60% of its 2019 level in 2022 VisitBritain has said that uncertainties relating to Omicron mean that estimates for 2021 are likely to be revised down slightly and forecasts for 2022 more significantly.

40. ALVA data (Table 4.1) shows that attractions in areas with an above average reliance on inbound visitors faced the strongest headwinds in 2020. Some attraction categories, such as heritage sites and museums / galleries are more reliant on inbound visitors than are gardens or zoos, and those with the highest share of inbound visitors face the greatest challenge.

Table 4.1: Impact of pandemic on visitor attractions

		Overseas visitor share at visitor attractions in 2019	Change in numberof visits to visitor attractions in 2020
Geograp	London	49%	-78%
	Rest of England	19%	-56%
	Scotland	43%	-71%
Attraction	Gardens & Leisure	15%	-37%
	Zoos	23%	-44%
	Heritage & Cathedrals	42%	-66%
	Museums & Galleries	42%	-77%

Source: ALVA

41. Reduced inbound visitor spending impacts business profitability thereby reducing corporation tax receipts, it impacts employment opportunities, it negatively impacts Air Passenger Duty and VAT receipts, and it erodes business confidence thereby diminishing private sector investment in visitor economy infrastructure.

Rebuilding Inbound Holiday Tourism.

42. Research conducted by Britain's tourist boards recently explored the attitudes of those in major source markets who had travelled abroad in the past 3 years. A positive finding was that 50% said they were 'definitely' likely to consider an international trip for leisure in the next year and a further 30% would 'probably' do so.

43. This finding is tempered by a follow-up question asking those considering a trip where they were in the planning process – only 13% had booked a trip whereas 25% admitted that while they would like to go at some point, they had given little thought as to when or where.

44. It is encouraging that motivation for travel remains strong, but marketing needs to provide both positive reasons to choose Britain and reassure those with travel concerns.

45. The same report 'Inbound COVID-19 Sentiment Tracker' explores what would encourage international leisure travel but finds there is no silver bullet. Travel concerns relate to health, travel restrictions and financial matters. Fore example 35% would be encouraged to travel by money-back guarantees should they need to change their plans and 31% by a significant decrease in coronavirus cases in the destination.

46. The other side of this coin is that if carriers, OTAs and hotels are not offering flexibility, or if coronavirus case numbers are sharply rising, visitors will be disinclined to book.

47. Removal of quarantine policies was cited by more than one-in-four as a way of boosting confidence with a similar proportion pointing to hygiene and safety protocols. By contrast only 12% said an official national hygiene label would make a difference.

48. Analysis in VisitBritain's 'Foresight – Issue 134' provides guidance on how best to leverage culture and heritage in marketing activity. The research found that culture is what makes a destination distinct and feel 'alive and active', whereas heritage was more retrospective, providing opportunities to 'see' things. Although having different connotations culture and heritage were seen as intertwined and complimentary, so one should not dominate marketing at the expense of the other.

49. Mirroring other evidence the study found that visitors do not simply want to be spectate, they want to participate, and this means that while future marketing may need to demonstrate a destination is 'safe' this cannot be at the expense of the visitor experience.

50. Two-thirds of the past and potential visitors quizzed agreed that itineraries would make people more likely to visit Britain – including itineraries of culture and heritage attractions in different areas and attraction itineraries covering different culture and heritage themes – with a bountiful offer visitors can find it tricky to figure out what they should see and do.

51. Recent progress in this area, for example the Great West Way between London and Bristol, has been made, but there is more to do, and competitors are well-advanced for example Ireland's Wild Atlantic Way and UNESCO has also partnered with the EU and National Geographic to develop World Heritage Journeys, a unique travel platform that deepens the tourism experience through four selected cultural routes covering 34 World Heritage sites.

52. A related finding was that visitors were keen on getting more information about how to travel around Britain – both practical information and details about costs.

53. Helpfully the survey also asked what culture and heritage attractions could do to attract more visitors: the answers included welcoming staff, there being places to eat/drink, and the availability of 'bundles' allowing transport and attraction entry to be combined.

54. On transport most inbound holiday visitors do not hire a car, perhaps one reason why so many who visit London do not venture further. There is a need to convey how easily,

and quickly, different destinations can be reached by rail, with cities such as York, Cardiff and Manchester only around two hours from London.

55. In essence marketing needs to quench visitors' thirst for information, provide practical hints and tips and be emotive.

56. It is always possible to find innovative ways to showcase existing culture and heritage attractions and fresh ways of interpreting the stories that have shaped what visitors see, but the pandemic has demonstrated how vital it is for the sector to embrace digitalisation. Dublin was ahead of the game with EPIC being a digital-only museum, but even if collections are 'real' museums and galleries need access to staff with strong digital skills if their offer is to appeal to the increasing number of visitors who don't recall life before smartphones.

57. Keeping existing attractions fresh matters but so too does ensuring an environment in which new attractions can emerge. The longer inbound holiday tourism remains in the doldrums the less incentive exists to invest in growing Britain's visitor offer.

58. Eden Project North in Morecambe is set to open in 2024 and should attract both domestic and inbound visitors to Lancashire, demonstrating tourism can be an integral part of regenerating not just cities but seaside towns too, with Margate having benefited from Turner Contemporary opened in 2011.

59. According to the World Travel and Tourism Council destinations should consider investing in authentic cultural experiences and create targeted cultural tourism marketing campaigns if they wish to outperform other destinations.

Bernard Donoghue

CEO, Association of Leading Visitor Attractions

Co-Chair, London Tourism Recovery Board

Members of ALVA:

Gardens, venues and leisure attractions:

Royal Botanic Gardens, Kew t: 020 8332 5655 w: www.kew.org

Chester Zoo t: 01244 380280 w: www.chesterzoo.org

The Crown Estate www.windsorgreatpark.co.uk/en/heritage/the-crown-estate

Eden Project t: 01726 811911 w: www.edenproject.com

Forestry England t: 03000674321 w: http://www.forestry.gov.uk/

Pleasure Beach t: 0871 222 1234 w: www.blackpoolpleasurebeach.com

Royal Albert Hall t: 020 7589 8212 w: http://www.royalalberthall.com/
Royal Botanic Gardens Edinburgh t: 0131 552 7171 w: www.rbge.org.uk
Royal Horticultural Society t: 0845 260 5000 w: www.rhs.org.uk
Royal Shakespeare Company t: 0844 800 1110 w: www.rsc.org.uk
Royal Zoological Society of Scotland t: 0131 334 9171 w: http://www.edinburghzoo.org.uk/
Southbank Centre t: +44 (0)20 7960 4200 w: www.southbankcentre.co.uk
The RSPB t: 01767 680551 w: http://www.rspb.org.uk/
Warner Bros. Studio Tour London t: 08450 840 900 w: www.wbstudiotour.co.uk
Wildfowl and Wetlands Trust w: www.wwt.org.uk
Zoological Society of London t: 0844 225 1826 w: www.zsl.org

Heritage and Cathedrals:

Canal & River Trust t: 0303 040 4040 w: canalrivertrust.org.uk
Canterbury Cathedral t: 01227 762862 w: www.canterbury-cathedral.org
Durham Cathedral t: +44 (0) 191 386 4266 w: https://www.durhamcathedral.co.uk/
English Heritage t: 0870 333 1181 w: www.english-heritage.org.uk
Historic Environment Scotland t: 0131 668 8600
Historic Environment Scotland w: http://www.historic-scotland.gov.uk/historicenvironmentscotland
Historic Royal Palaces t: 0844 482 7777 w: www.hrp.org.uk
Mary Rose t: 023 9281 2931 w: www.maryrose.org
National Trust t: 0844 800 1895 w: www.nationaltrust.org.uk
National Trust for Scotland t: 0844 493 2100 w: www.nts.org.uk
Old Royal Naval College t: 020 8269 4747 w: www.ornc.org
Roman Baths & Pump Room, Bath t: 01225 477785 w: www.romanbaths.co.uk
Royal Collection Trust t: 020 7839 1377 w: www.royalcollection.org.uk
Salisbury Cathedral www.salisburycathedral.org.uk
Shakespeare's Globe t: +44 (0)20 7902 1400 w: www.shakespearesglobe.com
SS Great Britain w: https://www.ssgreatbritain.org
St Paul's Cathedral t: 020 7246 8348 w: www.stpauls.co.uk/
The Churches Conservation Trust t: 0207 841 0400 w: www.visitchurches.org.uk
The Shakespeare Birthplace Trust t: +44 (0) 1789 204016 w: http://www.shakespeare.org.uk/home.html
Titanic Belfast t: +44 28 9076 6399 w: www.titanicbelfast.com
Treasure Houses of England w: www.treasurehouses.co.uk
UK Parliament t: 020 7219 4565 w: www.parliament.uk/visiting
Westminster Abbey t: 020 7222 5152 w: www.westminster-abbey.org
York Minster t: 0844 939 0011 w: www.yorkminster.org

Museums and Galleries:
Beamish w: http://www.beamish.org.uk
Bletchley Park https://bletchleypark.org.uk
Birmingham Museums Trust w: http://www.bmag.org.uk/
British Library t: 0843 2081144 w: www.bl.uk
British Museum t: 020 7323 8299 w: www.britishmuseum.org

City of London Attractions t: 0207 332 3693 w: www.visitthecity.co.uk

Design Museum https://designmuseum.org

Glasgow Museums t: 0141 287 4350 w: www.glasgowmuseums.com

Horniman Museum and Gardens t: +44 (0)20 8699 1872 w: www.horniman.ac.uk

Imperial War Museums t: 020 7416 5320 w: www.iwm.org.uk

Leeds Museums and Galleries w: https://museumsandgalleries.leeds.gov.uk

London Transport Museum w: www.ltmuseum.co.uk

National Galleries of Scotland t: 0131 624 6200 w: www.nationalgalleries.org

National Gallery t: 020 7747 2885 w: www.nationalgallery.org.uk

National Museum of the Royal Navy t: 02392 727574 w: www.nmrn-portsmouth.org.uk

National Museums Liverpool t: 0151 207 0001 w: www.liverpoolmuseums.org.uk

National Museums Northern Ireland w: https://nmni.com

National Museums Scotland t: 0300 123 6789 w: www.nms.ac.uk

National Portrait Gallery t: 020 7306 0055 w: www.npg.org.uk

Natural History Museum t: 020 7942 5000 w: www.nhm.ac.uk

Oxford University Museums t: 01865 282456 w: www.museums.ox.ac.uk

RAF Museums t: 020 8205 2266 w: www.rafmuseum.org.uk

Royal Academy t: 020 7300 8000 w: www.royalacademy.org.uk

Royal Museums Greenwich t: 020 8858 4422 w: www.rmg.co.uk

Science Museum Group t: 0870 8704771 w: www.sciencemuseumgroup.ac.uk

Somerset House t: +44 (0)20 7845 4600 w: http://www.somersethouse.org.uk/

Tate Gallery t: 020 7887 8888 w: www.tate.org.uk

Tyne and Wear Archives and Museums w: https://www.twmuseums.org.uk

Victoria and Albert Museum t: 020 7942 2000 w: www.vam.ac.uk

5th January 2022