STRATEGIC MARKETING

Executive Summary
Cultural Tourism Research

Visit Wales and the Arts Council of Wales

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Visit Wales
Croeso Cymru

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1. Background and Methodology

1.1 The national tourism strategy "Achieving Our Potential 2006-2013" identified the need to prepare a cultural tourism action plan for Wales to realise the tourism potential of Wales' cultural assets.

1.2 The Cultural Tourism Steering Group was set up in May 2008 following a review of cultural tourism, with the aims of providing strategic leadership and to drive initiatives. Their initial task has been to produce a costed action plan to take Cultural Tourism forward up to 2011.

1.3 The steering group is chaired by Visit Wales and includes representatives from Cadw, Cymal and the Cultural Directorate from within the Department of Heritage, the National Museum, the Arts Council of Wales, the Welsh Language Board, Welsh Local Government Association and the Wales Tourism Alliance.

1.4 The steering group has highlighted the need to follow up on research that was conducted in 2003 in order to assess how cultural tourism perceptions have changed. The 2003 research was useful for evaluating cultural tourism, the perception of Wales and its position in the cultural tourism market and the main barriers to visiting Wales.

1.5 Visit Wales and the Arts Council of Wales on behalf of the Welsh Assembly Government's Cultural Tourism Steering Group commissioned focus group research to examine perceptions of Wales as a cultural tourism destination and to gain an insight into the needs and behaviour of visitors interested in undertaking cultural visits and activities.

Research Objectives

1.6 The overall aim of the project was to review Wales' position as a cultural tourism destination in the eyes of key markets. And to show trends in perceptions and cultural tourism habits since the benchmarking research in 2003.

1.7 The specific objectives of the study were to:

- examine perceptions of Wales as a cultural tourism destination;
- assess Wales position in the cultural tourism market;
- build on similar research conducted in 2003 in order to access changes in perceptions of Wales as a cultural tourism destination;
- gain insight into the motivations of visitors interested in undertaking cultural visits and activities;
- identify the main barriers to visiting Wales;
- explore the behaviour of visitors in advance of their visit in terms of information.

1.8 Visit Wales has approached cultural tourism from the viewpoint that all tourism has culture as an intrinsic part of the total visitor experience. For the purposes of this research project, cultural tourism was understood as being visits to a destination with the purpose (solely or partly) of experiencing any of the following aspects:

- heritage attractions, museums and art/craft galleries
- craft workshops
- performing arts
- carnivals, festivals and events
- historic and contemporary gardens
- cultural landscape, including many of the rural traditions
- sense of place in towns and villages
- the Welsh language, the people of Wales and their heritage

Sample

1.9 Respondents were selected to be typical of the target market for cultural tourism in Wales, following a similar structure to the 2003 research.

1.10 All were 'Independent Explorers', defined by their agreement with all of the following statements:

- I enjoy discovering new experiences and places to visit within the United Kingdom
- I prefer to be independent and do my own thing when taking holidays and breaks
- I get a real sense of achievement and satisfaction planning and organising my own trip
- I like to learn about the local way of life and culture of the places I visit
- I like to visit places that are still undiscovered by tourists

1.11 Defined by their last UK break, 50% were cultural tourists and 50% general tourists. To be defined as a cultural tourist, respondents had to agree strongly that at least two of the following were very important in their choice of destination for their last UK break or holiday; a general tourist had to agree that at least one was very or quite important:

- Museums/galleries to visit
- Stately homes/gardens to visit
- Specific 'cultural' events e.g. festivals, theatre, opera etc

- Historical, cultural sights e.g. castles, overall architecture etc

1.12 All respondents were decision makers on holidays / short breaks, and had taken at least one overnight trip in the UK in the last year. In each English and Irish group half of those had been to Wales, and the remainder did not reject the idea of going to Wales. All stayed independently in paid-for accommodation (i.e. did not only stay with family / friends). We excluded people who only go on commercially organised packages (e.g. coach trips).

1.13 We had a roughly equal numbers of men & women in each focus group, and excluded anyone employed in market research or tourism.

Composition of Focus Groups

1.14 There were 11 focus groups with 87 respondents present (8 respondents at all except for one group of 7). Fieldwork was conducted between 4th & 24th February 2009.

1.15 The groups were split by location, and by life stage as shown in table below. In Wales one group was in Cardiff, the other in Colwyn Bay in order to pick up any differences in opinion between those living in the north and south.

	Wales	SE	Midlands	North	Ireland
Adults aged 20-40 yrs who travel mainly in parties of adults	Colwyn Bay	Wimbledon	Sutton Coldfield		Dublin
Adults aged 25-45 who travel mainly in parties with children		Wimbledon		Altrincham	Dublin
Adults aged 40-70 yrs who travel mainly in parties of adults	Cardiff		Sutton Coldfield	Altrincham	Dublin

2. Main Findings and Recommendations

Understanding Cultural Tourism

2.1 Visit Wales has approached cultural tourism from the viewpoint that all tourism has culture as an intrinsic part of the total visitor experience. This research and that undertaken in 2003 endorses this approach.

2.2 In the context of tourism consumers interpret culture as all aspects of a destination that create its special, even unique character. This includes the range of categories defined by Visit Wales and some people say includes almost everything. It was in many ways easier to define what was not cultural – somewhere without a sense of place such as a spa break or sun and sand.

2.3 However it is vital to understand that most people do not use the word culture to describe these categories or think of them as cultural. They call them "things to do", "activities" or "attractions". The following quotes are typical:

"Culture is "Castles. Museums. Something specific to the area what's local. History" …"Local people and what they've done in the past" (Sale, families)

"I think of history, I think of buildings and things which are quite antiquated." …. "theatre" "… people as well" "It's the way of life" … "what they do and what they eat" … "culture is just what makes a place a place, like Birmingham culture is … the curries, … the Bull Ring, … the accent. It's all those things." (Birmingham, pre-family adults)

"Heritage is culture. It depends … on how you define it, but for some of us it is the food, it is going to Rick Stein's, … culture's one of these big words that changes its shape" (Cardiff, post family)

"Wales, that slate mine we went to was fantastic and we got a demonstration of the slates… I suppose culture whatever is going on locally you know. You can find it everywhere you go." (Dublin, post family)

2.4 When the term 'cultural tourism' was introduced to groups this usually evoked thoughts of a focus on the performing arts, galleries and possibly museums. Only a small minority would see themselves as a 'cultural tourist'. People often describe this as 'high-culture' and it alienates more people than it appeals to as illustrated by these quotes:

"String quartets … Shakespeare"… "culture to me … I would always think of it as being quite middle class and a bit hoity (toity)" (Birmingham, post family adults)

"I'm looking for heritage and things like that … the term culture tends not to come into play" … "The word heritage is better than the word culture. … it puts people off, culture." … "heritage you can understand … (Cardiff, post family adults)

Cultural Destinations

2.5 Cities are the first places that come to mind when people are asked about places with a reputation for culture. This is because that's where cultural buildings and collections of cultural things tend to be, where events are held, and where there is enough to do in one place to sustain a break. The following quote sums this up:

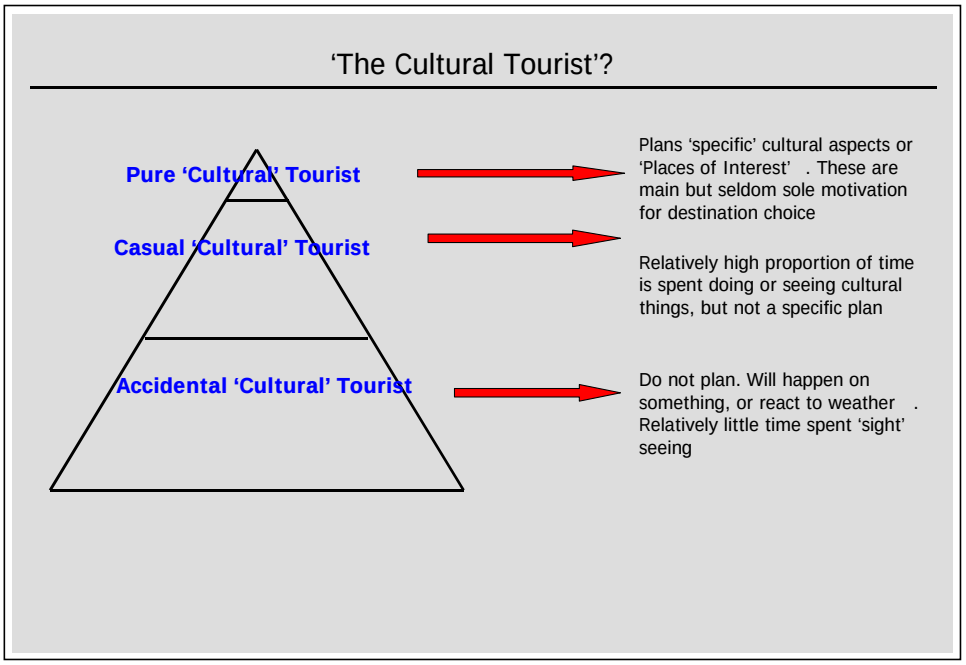
(cities have a) "Higher concentration." "I think that's it, there's more of it, there's more choice in those areas. Whereas you go and see Beatrix Potter's birthplace, it's just in the middle of nowhere." "It's only really one thing to see, whereas a city you're spoilt for choice, aren't you?" (Sale, families)

2.6 Rome, Venice, Barcelona, Florence and Paris tend to be the most iconic European cities. In the UK, cities with a strong reputation for culture include London, Edinburgh, Bath, Chester Stratford and York. No Welsh city was mentioned and Wales was rarely mentioned as a cultural country.

Cultural Tourists

2.7 The three types of Cultural Tourist identified in 2003 were clear to see in 2009 and we believe remain largely unchanged in motivation, behaviour or proportion. These three types were defined as:

- The pure cultural tourist – a small minority
- The casual cultural tourist – the majority in this research
- The accidental tourist – minority in this research, but probably a majority of the population



2.8 The three groups are described briefly below, but it may be just as appropriate to think in terms of type of trip.

The Pure Cultural Tourist

2.9 For these people a specific cultural component is the main, but rarely the only reason for the choice of destination. The trip may be focused on an event – concert, exhibition, festival etc or on a theme/place – heritage, gardens, cultural figures etc. Other possible pure cultural trips could relate to TV and film settings, although whilst groups discussed these, no members had been on a trip like this.

2.10 It is important to recognise that the majority of people in this category are at the popular end – they go to see a pop concert or show and have little interest in 'high culture', although there are those that are the opposite.

2.11 These tourists are likely to be an adults-only couple or friends and they tend to be older. They are more likely to be taking a short break than a full holiday. Good quality food and accommodation tends to be an important element but not exclusively so.

"I've just booked for a concert in Cardiff … we fancied going to Pembrokeshire for a holiday on the coast down there, and so we're going to combine the two. Last year we went to the O2 arena for a concert so we spent some time in London" (Sale, post family)

The Casual Cultural Tourist

2.12 These people tend to spend a relatively large amount of their break or holiday time seeing or doing cultural things.

2.13 They often research thoroughly before they go but make few hard and fast plans. They feel strongly that a break is about relaxation and plans suggest the opposite. Many expect that almost any destination will have enough for them to do to fill their time.

2.14 For these people culture gives the destination a context and can be a key reason people choose to visit. Both cultural and non cultural factors play a part and can be of equal importance. For many parties having a range of things available is important so that everyone is satisfied.

2.15 Shopping is important for many and argued by some as being particularly important and part of the culture if it has a local flavour.

2.16 The Casual Cultural Tourist is more likely to be without children or with older children.

"I'm going to Amsterdam in 2 weeks and all we've done is book flights, accommodation and I said I'm not booking anything (else), I just want to go and see when I'm there, and see what takes my mood" (Birmingham pre-family)

The Accidental Cultural Tourist

2.17 The defining nature of this group is that they pay little attention to specific cultural aspects of a destination before deciding where to go. They may well visit places of interest or other attractions if they come across them or if the weather forces them indoors.

2.18 Adults-only groups comprise a significant number of Accidental Cultural Tourists including groups of friends just going away to spend time together. Families with older children are also strongly represented in this group.

2.19 The generic cultural backdrop still has an important role in deciding which destination

"when we go away, we just want to be away from home. Not bothered about museums, if they're there we'll pop in and see them if we're away. But the

main thing is just getting away and disappearing for a couple of days" (Sale, post family)

Decision Making

2.20 Lifestage exerted a strong effect on how people decide on the elements of their trip and the main motivation.

2.21 Not surprisingly family groups behaved very differently to adult-only groups and the age of children is a key factor.

2.22 Adult only groups were split between those who want more active breaks and the opportunity to experience new things and those that want less active relaxation. Culture has the greatest opportunity to influence those tourists looking for a more active break.

The Decision Process

2.23 Broad boundaries for a trip seem to be set fairly quickly by most people through considering who is going, what the trip is for, what they can afford and destinations where they might go.

2.24 A range of other factors are then considered before a final choice is made. Amongst these are cultural factors such as setting, things to do, places to see and food and drink – the general cultural backdrop.

2.25 For those on a pure cultural trip, the event, exhibition, festival etc. will be the driving force from the outset.

2.26 This second stage can take some time and is an enjoyable part of the process for many people.

Type of Tourist

2.27 When in a family group, parents want reassurance that a destination has things to do cultural and non cultural if they need them – typical of accidental cultural tourists. This is particularly true of those with younger children but perhaps less so of those with older children who can be more interested in cultural things. For mid to late 'teens however cultural things are not seen as 'cool'.

2.28 Adults of all ages travelling as couples or in larger groups would seem to be the largest cultural tourist group. Cultural things to do and places to visit can be key to their choice of destination particularly for older, sometimes retired empty nesters. They can be especially interested in history and heritage of all kinds, crafts, houses, castles and gardens.

2.29 Young people, pre-family travelling without a partner but often in groups tend not to be interested in culture, but merely in having a good time.

Sources of Information

2.30 The internet is now the dominant channel for researching trips prior to departure. This is a major change compared to 2003. Word of mouth, TV and newspapers still have a role in the planning of a trip especially in terms of prompting ideas. People of all ages use the internet although those least likely to use it are the empty nesters.

2.31 Leaflets at destinations are very useful and have a key role for casual and accidental cultural tourists who comprise a large proportion of visitors to Wales.

2.32 Many people also use the internet to book and pay for accommodation, travel and events. They are of all ages but the most prevalent use is amongst younger people. Apart from some people who have concerns over security and others who are not confident users of the internet, the main reason for not booking on line is where people have complicated requirements and / or want to ask questions.

2.33 Everybody uses Google for general web searches, but some accommodation provider sites are known and popular. There is some use of 'tourist board' websites because they provide a good starting point. Independent review sites such as TripAdvisor are widely used and appreciated by many.

Views of Wales

2.34 Respondents in the groups had either visited Wales, or were open to the idea of going there. Despite this it was notable how little detail many knew about Wales. The 2003 report described Wales as a relatively "empty" country in people's minds – this perception does not seem to have changed much.

2.35 What knowledge there is tends to be limited to places they have been to and has a regional bias. People from the north of England, the Midlands and Ireland tend to know the north best; southerners tend to know the south or mid Wales. The Welsh groups had a broader knowledge, though often with a significant bias to the north or south.

2.36 The Irish are notably warm in their attitudes to Wales as another Celtic country, though their knowledge of the country is no better than that of the English. Some particularly respected and admired what Wales has achieved for its language.

2.37 Wales is well known for its industrial heritage and history. Its castles and its mining heritage are icons. Other strong associations are rugby, choirs the daffodil and leeks.

2.38 Wales is positioned in the mind of tourists as a place for both active and relaxing breaks and holidays in the peace of the countryside or maybe by a beach. It is definitely not seen as a place for city breaks. Most did not know, so could not imagine why they would want to spend time in Cardiff or Swansea.

2.39 The Millennium Stadium has certainly raised Cardiff's profile and many of those that had been to Cardiff for a break had been because of a sporting event or concert. Opinions were divided even amongst these people over its attractiveness for city breaks.

2.40 Typical comments about Wales and some about Scotland are:

"I'm really struggling to think of things that are there" (Sale, families)

"It's more nature that would draw me in rather than (culture) … like I said before there aren't any big cities or towns really that you know. I don't have at the moment any immediate interest to go and see (Wales)" (Wimbledon families)

"I think the countryside is great, and I don't go there for the culture, I go there because ….. I think Wales is almost like Birmingham's playground in a way, you can go mountain biking, beaches, you've got the walking" (Birmingham pre-family)

"beaches … hills, black mountains, sheep" …" it is just peaceful and quiet" (Wimbledon families)

"Wales is … coal and rugby and male voice choirs" (Cardiff, post family)

"if you go to Spain you know what you're getting … If you're going to Wales you'd have to look up what you're going to get" (Dublin families)

"I suppose that's another thing ... the Scottish have a very strong identity … the English in the different regions, because it is so big they have different identities, but they're very identifiable. Whereas in Wales you just wouldn't know what to expect" (Dublin families)

(Scotland's culture is) "Whiskey" "Distilleries" "The castles" … "Rob Roy ... all the history" "I think the dramatic countryside as well" (Altrincham, post family adults)

Wales as a Cultural Destination

2.41 When asked about Wales, many people say that Wales is rich in culture. They think broadly of its history and heritage, crafts, folklore, festivals and song. However people often do not know exactly what there is to do.

2.42 There is no dominant cultural icon in Wales, awareness of places of interest and things to do is diffused amongst several categories:

- Castles
- Gardens and historic houses
- Industrial heritage sites and steam railways
- Crafts

2.43 There is little awareness of Welsh museums.

2.44 Cardiff is universally perceived as the only serious option for a city break. Swansea is the only other city that most people knew, but is thought of as too small.

2.45 There is a problem for Cardiff however in that relatively little is known about it. Relative to large cities such as London, Manchester, Edinburgh, Liverpool etc people feel that there is no compelling reason to visit.

2.46 Cardiff was best known for the Millennium Stadium, rugby and pop concerts. There was only limited knowledge outside of Cardiff residents of any specific arts venue, company or their programmes. Cardiff at best is:

"just a city … like any other ... I don't know why I would want to go there?"

And at worst is:

"a bit rough"

2.47 The Eisteddfod is the Welsh festival with the strongest profile, but few people knew much about it or had been. This is in contrast to the broad appeal of Edinburgh's festival. The Eisteddfod is generally seen as something primarily for the Welsh.

2.48 The general perception was that Wales is focused on crafts rather than arts – this fits with the view of Wales as a countryside destination. We heard nothing about visual arts in Wales.

2.49 There are a wide variety of cultural figures that people recalled in relation to Wales. The most often mentioned and by all ages related to popular culture – Tom Jones, Catherine Zeta Jones and Katherine Jenkins. Others mentioned include Shirley Bassey, Max Boyce, Harry Secombe, Charlotte Church, Cerys Matthews and groups such as Stereophonics and Manic Street Preachers.

2.50 Amongst the younger audiences TV has generated references to Gavin and Stacey and Glynn from 'Big Brother'.

2.51 Richard Burton and Anthony Hopkins are well known for being Welsh and were widely mentioned. Much less well known was Dylan Thomas. Lloyd George was the only political figure mentioned.

The Welsh Language

2.52 The language is an intrinsic and strong element of the culture of Wales and provides a sense of place. Welsh on signs, menus etc is accepted.

2.53 The Irish in particular respect the language and say they like to hear it. Views are mixed with the English: some feel excluded by the language.

2.54 The idea of Welsh music in pubs for instance is fine but Wales is not seen to have a tradition of this like the Irish or to a lesser extent the Scots. Welsh music as personified by choirs is perceived to be more formal and if the singing was in Welsh visitors could not join in.

"I think we actually admire them … we have tried to revive Irish here … (but) at the end of the day we're still not speaking it. …. but they have revived it in a way that they're proud to speak it" (Dublin, post family)

Barriers to Visiting Wales

2.55 The main barrier is a lack of knowledge of what Wales has to offer in terms of things to do under the broad Visit Wales definition of culture.

2.56 Consumers have a much stronger and better defined image of Scotland or of the south west of England. Wales is not especially famous for any one thing.

2.57 Wales is positioned in the mind of tourists as a place for both active and relaxing breaks and holidays in the peace of the countryside or maybe by a beach. This tends to be at odds with large parts of the cultural agenda.

2.58 Wales is perceived to have a slower pace of life and is slightly old-fashioned. This is a negative in the context of city breaks and cities as destinations for performing arts, galleries and museums. Neither Cardiff nor Swansea are seen as being large enough to sustain a city break or to have the "buzz" that younger people gravitate to.

2.59 In the minds of some the Welsh are not perceived to be friendly, especially in relation to some Welsh speaking areas.

Implications and Recommendations

2.60 The wide definition of cultural tourism used by Visit Wales is in tune with the way that the public thinks and makes choices between destinations. However the public think in terms of a range of things to do and see, not in terms of cultural activities.

2.61 The term cultural tourism does not seem to be helpful from a marketing perspective. Amongst the public, the term cultural tourism appeals to only a very small minority and is typically described as 'high' culture. The alternative, much broader, Visit Wales definition is too wide to help define market segments.

2.62 The public tend to think of cultural destinations as cities rather than countries and Cardiff is not seen as a cultural destination. As a consequence, the concept of promoting Wales as a cultural destination is an inappropriate objective at present.

2.63 Awareness of specific things to do in Wales is a weakness and appears to be no better than it was in the 2003 research even amongst those that have

visited Wales. The question needs to be asked whether there is a real weakness compared to competitor regions or whether this is a perception.

2.64 Wales' promotional activities should reflect the way that the public thinks and focus strongly on things to do and see. The public tends to look for things to do and see within a more concentrated area than Wales as a whole. This suggests that the promotional emphasis should be on smaller recognisable areas. City breaks for example could be considered a prime example of focusing on a small area.

2.65 Within these areas promotion must encompass a range of things to do and see, so that the diverse interests of individuals and groups are catered for. This must include all types of shopping. Accommodation and food, catering for a variety of tastes and budgets are always an important element in the mix. Wales' target customer is the independent traveller and by definition they are not looking for packaged holidays but suggested 'things to do' itineraries would be valuable.

2.66 Cardiff is not perceived as a city break destination but is seen as the only viable contender in Wales. Sporting events and rock concerts have significantly raised awareness of the city since 2003, yet most people do not feel that there is any particular reason outside of an event to visit the city.

2.67 A key activity for Cardiff and other areas would therefore seem to be improving the awareness of things to do with existing visitors when they are in an area through various forms of 'point of sale' material or pre-visit information. Co-ordinated promotional activities between event organisers and other tourism operators should be a priority.

2.68 Cardiff needs to create and promote an identity that is attractive and different from its much larger and well established competitors. The 'city region' concept may have a broader appeal than just Cardiff.