

Late Like A Local



Museum Lates' contribution
to the cultural tourism offer

“Museums are the most popular destinations for domestic holiday makers within Great Britain and 48% of international holiday makers visit a museum.”

Museums and Tourism, National Museums Director’s Council report 2013

Introduction

Late Like A Local is a study conducted by Culture24 and supported by Airbnb, into the current and potential links and connections between museum/gallery after-hours events (Lates) and the programmers who organise them and the hosts on Airbnb (as well as the cultural tourists who stay with them).

We explored the potential impact of museum / gallery Lates on cultural tourism within a Night-Time Economy (NTE) context with a focus on hosts in three areas in England: Manchester; Brighton; and Devon / Cornwall.

Why we conducted this research

The purpose of the research is to identify the ways in which cultural organisations and hosts on Airbnb can collaborate to create more opportunities for tourists to discover and experience a more diverse evening offer.

The development of Lates since the first regular night in the UK at the V&A in 2001 and the emergence of Airbnb, founded in 2008, have a striking parallel. Both offer ways of utilising unproductive spaces: museums use their spaces to extend their productive hours, attract new visitors and generate income; while hosts on Airbnb use their spare rooms or second homes to make money, meet new people and widen their horizons.

Definitions and context

“The NTE refers to all economic activity taking place between the hours of 6pm and 6am.”¹ (Mayor of London’s London Plan, November 2017). While the need to strike a balance between residents’ concerns and visitors’ needs is paramount, the NTE presents abundant opportunities for economic growth.

Policymakers around the world recognise the need for a diverse night-time entertainment offer consisting of a balance between bars and clubs and cultural venues. One of the key recommendations in ‘Culture and the night-time economy - Supplementary Planning Guidance’ (Greater London Authority, April 2017) is “ensuring a wide range of evening and night-time activities are on offer to London’s diverse population.”²

Philip Kolvin QC, former Chair of the London Night Time Commission explained,

“When we’re talking about the night-time economy we’re not just talking about pubs and clubs, we’re talking about everything which people might like to do at night... we need to have a night-time economy which is accessible to all... and one really crucial part of that is that our museums and galleries are available to people at night.”

¹. www.london.gov.uk/what-we-do/planning/london-plan/new-london-plan/draft-new-london-plan/

². www.london.gov.uk/what-we-do/planning/london-plan/new-london-plan/draft-new-london-plan/

Executive Summary

Lates have a major role to play in this diverse ecosystem as they can provide a high quality mix of creative content and a food and beverage offer under one roof. Typically the majority of visitors to Lates events are drawn from the venue's local community, however hotspots such as central London, Bath and Edinburgh have historically drawn large numbers of cultural tourists.

Cultural tourism - "visits by persons from outside the host community motivated wholly or in part by interest in the historical, artistic, scientific or lifestyle/heritage offerings of a community..." - is an important factor driving visitation to locations that are off the beaten track.³ For Airbnb guests, motivated to 'Live Like A Local', Lates are a great way to get to know cultural venues in the same experiential way in which local communities enjoy them.

What we did (the dataset inputs)

We chose three focus areas based on host and guest data supplied by Airbnb and an analysis of Culture24 Lates event listings data, and sent a link to a survey to hosts in the three areas. The survey asked hosts for their opinions about the night-time cultural offer in their area and how they communicate it to their guests. We then conducted workshop-style meetup sessions with cultural venue programmers and hosts in the three focus areas, making connections and exploring ways to develop cultural tourist interaction with the local cultural offer.

³. <https://www.sciencedirect.com/science/article/pii/S026151779500039Q>

We also drew on nine years of Culture24 Lates events data (museum and gallery Lates event listings); interviews conducted in the summer of 2017 with UK & international cultural venues and NTE policy makers (in Mexico City, Sydney, Melbourne and Moscow); and a UK public opinion survey responded to by 1,074 people.⁴

All data, charts, reports and literature referred to in this report can be obtained for free by emailing LatesResearch@Culture24.org.uk and requesting the login details to the Culture24Research Google Drive.

Executive summary

Late Like A Local forms the cultural tourism strand of a three-part study by Culture24 into the impact of Lates on the night-time economy. The Arts Council England-funded report, *A Culture of Lates* and the Winston Churchill Memorial Trust-supported report, *An International Culture of Lates* contain evidence, findings and a set of recommendations for NTE policymakers and venue programmers. This report's findings and recommendations sit alongside those of the other two reports and if acted upon could also make a key contribution to developing a 'Culture of Lates' in the UK, leading to the benefits of more choice for cultural tourists and growth for the tourism industry.⁵

⁴. Full details on all datasets used in the research available in *A Culture of Lates*

⁵. See *A Culture of Lates* for a definition of 'Culture of Lates'

Key findings

- 1 Positive impact on the visitor:** Lates, active events where participation is encouraged, are an opportunity for tourists to experience culture with and like a local
- 2 A balanced market where supply meets demand:** Lates events are likely to include music, food and drink - just what hosts say cultural tourists want
- 3 Nature of the programme: regional differences are important:** Cultural tourists want distinctive experiences and even the ways in which hosts communicate with guests vary regionally. While some trends apply nationwide, the importance of Chinese guests being one example, a distinctive and targeted local offer is key to a compelling events programme that successfully attracts cultural tourists
- 4 The host factor - locals know best:** Hosts are ideally placed between guests and the local cultural offer to help develop audiences for a diverse night-time cultural offer
- 5 Economic impact:** Lates contribute £9.6m a year to the NTE in ticket sales revenue alone. A 5% increase in year-on-year ticket capacity and sales would add a total of £7.7m extra to local economic activity between 2018 and 2022 (plus additional secondary spend on food, beverage and transport)

Recommendations

Based on our findings we advocate to all stakeholders that:

- 1 Lates should be part of an area's night-time economy strategy and supported with effective marketing
- 2 More opportunities are created for hosts and venue programmers to work together to widen choice for cultural tourists for instance venue tours for hosts, venues supplying event listings to hosts and marketing tailored to cultural tourists
- 3 Policymakers support venues to expand their night time offer to open up more night time cultural choices for cultural tourists
- 4 Structures and platforms are created that help museums get their product more effectively to market and enable cultural tourists to more easily access information and tickets
- 5 More museums and galleries collect residence data from Lates event visitors in order to track levels of local and tourist visitation and devise programmes accordingly

Key research insights

1. Positive impact on the visitor

Lates, active social events where participation is encouraged, are an opportunity for tourists to experience culture like and with a local.

If there is a single indicator of the difference between the experience of visiting a museum/gallery during the day compared to visiting in the evening, it is the extent to which the visit is a social activity. When people attend evening events in museums many do so in friendship groups, without children, and consider their visit primarily as a leisure activity rather than a learning opportunity. Many venues programme with a focus on creating this social space, a convivial atmosphere in which to relax, socialise and possibly meet new people.

Museums at Night Festival visitor surveys have, over 9 years, consistently shown that most people attend events with friends or partners. Analysis of feedback from visitors who attended evening events that were part of Culture24's artist/museum event matching Connect! project in 2015 & 2016 shows that 34% attended events with friends, 31% with partners and 17.1% with family.⁶

Currently the majority of visitors to Lates events are locals, hence most venues' marketing is aimed at a local audience. Marilyn Scott, Director of Lightbox in Woking, expresses a typical opinion when she says, "99.9% of our marketing is aimed at local people or people within a 40 minute drive time." However, tourists want social experiences as well, and this presents a great opportunity for venues and cultural tourism organisations to breach this untapped market.

⁶. Reports / Page 4, Connect! 2015 & 2016 report appendices – Culture24Research Google drive)

Like museums' collections, Lates events are local cultural stories but communicated through experiences rather than objects. These event-based experiences help visitors see museums in a different, more locally focused, light.

Events, and particularly immersive experiences, increasingly drive visitation to new locations. Visiting the local museum or gallery might be on a cultural tourist's to-do list but if that can be combined with a social experience, then it will rise nearer to the top of the agenda.

A majority of public survey respondents (59%) replied yes to the question "**Would more cultural venues' after-hours events in other locations other than your hometown, make those destinations more attractive to visit?**" A further 24% said they didn't know and only 17% said no, suggesting that these type of experiential events could contribute to driving visitation, not only from locals, but tourists too.⁷

One host from the Brighton meetup commented that groups of four or more were particularly interested in learning what was on and events that they could go to, contrasting this with couples who were happier in their own company. This kind of insight should be used by venue programming and marketing teams when thinking about what kinds of events could attract these social groups, such as mystery nights, treasure hunts and other activities particularly suitable for groups.

Visitors using Airbnb platform for their holiday or business accommodation are more likely to choose destinations away from the usual tourist centres.

⁷. Surveys conducted by Culture24, Research Now and the Audience Agency, spring and summer 2017 – data available on Culture24Research Google drive

Lates, active social events where participation is encouraged, are an opportunity for tourists to experience culture like and with a local.

As Rebecca Mouy, Committee for Sydney's Policy & Projects Officer told us: "[We have] lots of Airbnb listings in places where you wouldn't usually have tourists staying. We have areas in all parts of Sydney that are doing really great night-time activities and so I think Airbnb can play into that really well to enhance visitation."⁷

2,555 museums, galleries, archives, libraries, historic houses, sacred sites and heritage venues registered Lates events on the Culture24 system between January 2009 and April 2017 in each of the 12 regions and nations of the UK, demonstrating the breadth of the country's offer.⁸

There is a real synergy here between the local nature of the museum's offer and the booking habits of the Airbnb customer.

⁸. See Maps / Lates venues 2009-2017 by Region map, Culture24research Google Drive

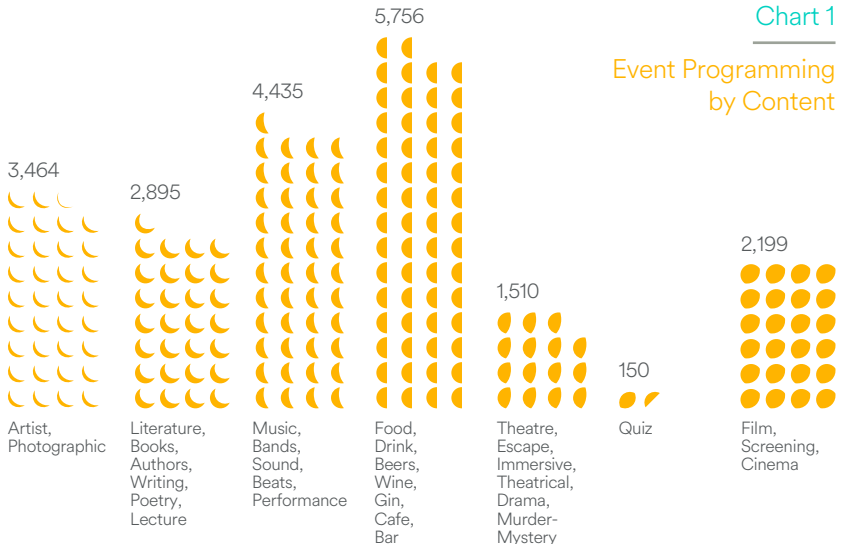
2. A balanced market where supply meets demand

Lates events are likely to include music, food and drink - just what hosts say cultural tourists want.

18,198 Lates events were registered on the Culture24 database between January 2009 and April 2017 and we estimate that is just 25% of the total Lates events programmed in the UK in that period.⁹

The most frequently programmed content in a Lates event is music with a food and beverage offer. Food and drink were a part of the offer at 5,756 events on the Culture24 database, beating music and performance into second place with 4,435 events. Many of these events in the performance category probably featured both music and food and drink. (Chart 1)

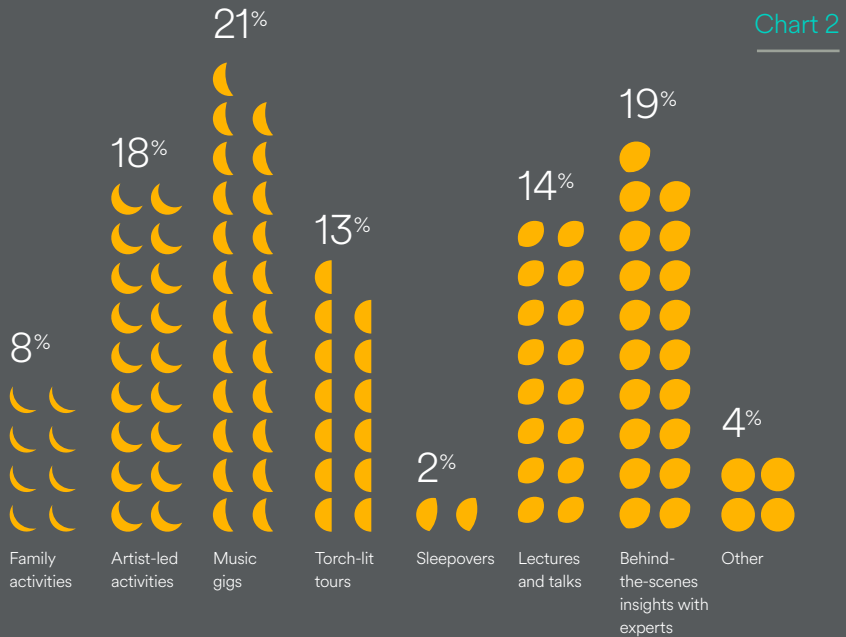
⁹. See 1. Culture of Lates / Total number of events chart, Culture24Research Google Drive



Q. What kind of after-hours cultural events do you think your guests would want to attend in your local museums and galleries?

Analysis

In response to the question, “What kinds of after-hours cultural events do you think your guests would want to attend in your local museums and galleries?” and given a choice of eight types of event, hosts thought guests would be most attracted to music (Chart 2).



Other popular choices with visitors, such as behind-the-scenes insights with experts and meet-the-artist events are also well catered for by museums.

A big majority of public survey respondents (72.9%) replied yes to the question, “Would more after-hours events or extended hours in your local cultural venues make you interested in attending more often?” suggesting that if these types of events were offered more frequently more people would attend.

Demand from hosts to take part in the Penzance session was so high that we had to disappoint 13 people who applied to take part...

Hosts on Airbnb were very clear about what they think is important to their guests. Hosts were asked what they think would be most valuable to their guests from a list of options. They chose 'A great selection of bars and restaurants nearby', as number one and 'A good mix of local culture and heritage venues open in the evening nearby', as number two. A Lates event can combine these two options into one great choice.¹⁰

The meetups demonstrated that programmers and hosts would value the opportunity to work together to devise events and marketing to attract more guests. Demand from hosts to take part in the Penzance sessions was so high that we had to disappoint 13 people who applied to take part - as many people again as we were able to accommodate.

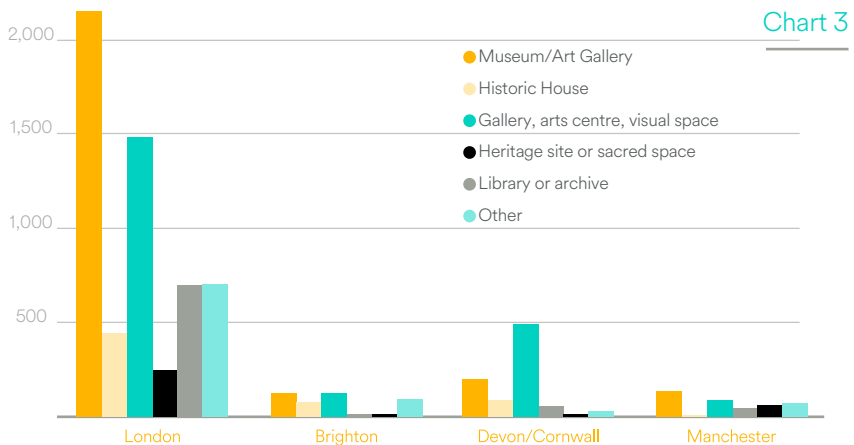
¹⁰. See Late Like A Local Charts / 7. Thinking about your guests, Culture24Research Google drive

3. Nature of the programme: regional differences are important and supply meets demand

Around the country the programmes are different, the way hosts communicate with guests varies and the guest profile is diverse.

All the datasets revealed interesting contrasts in the kinds of events, and the types of venues programming the events, both on offer and that appeal to visitors in different regions of the country. We found that Cornwall and Devon venues offer a nationally significant programme of Lates in galleries and arts centres. These types of venues are programming Lates in the sorts of numbers that comparable venues in other parts of the country are not yet doing (Chart 3).

This presents hosts with a great opportunity to exploit the region's outstanding offer. Hosts at the Penzance meetup told us their Airbnb guests are often very physically active in the daytime so prefer less physically-demanding evening activities.



Key research insights

How hosts communicate the local cultural offer to their guests varied from region to region. In Devon and Cornwall hosts communicate the local cultural offer largely through print materials, as opposed to digitally. All Manchester hosts like to meet their guests in person and give them local cultural recommendations, and hosts described culture as a prime motivator for guests' bookings. One Manchester host told us they like to accompany guests to local museums, which is a fabulous added-value service, and an informal version of a host offering an Airbnb Experience.

Brighton has a higher number of hosts per capita than cities with twice its population or more - 1,400 compared to Bristol's 1,500 and Manchester's 1,000 (Airbnb-supplied data, 2016) and a higher number of Lates registered on the Culture24 system than comparably-sized cities like Bristol. In contrast to Devon/Cornwall, Brighton hosts favoured active, immersive events and many of the events registered with Culture24 in Brighton contained a participatory element.

We also found some evidence of venues in the international research countries starting to work with local hosts to attract guests to Lates events. The Interactive Museum of Economics in Mexico City and the Garage Contemporary Art Gallery and the Museum of Modern Art in Moscow all mentioned marketing initiatives with Airbnb as a way they are trying to attract cultural tourists.

Understanding what cultural tourists want from an evening event is vital if venue programmers are to devise events that appeal to this market. The research evidence demonstrates that there is a strong local character to a venue's Late offer and what appeals to visitors varies by location. This regional distinctiveness can form the basis of a very clear offer that hosts can market to guests and hosts on Airbnb are in a great position to communicate this offer to their guests.

4. The host factor: locals know best

Hosts are ideally placed between guests and the local cultural offer to help develop audiences for a diverse night time cultural offer.

Interviews with UK venue programmers revealed museum Lates contributions to the night-time economy and night-time economy strategies in many towns, including Sheffield, Woking, Bury and Plymouth. When these events are part of festivals they become particularly marketable to cultural tourists who are attracted by the critical mass of lots of things going on in the same place at the same time.

A large proportion of current Lates take place in the 'shoulder seasons' of spring and autumn as part of the national Museums at Night festival, perfect for boosting cultural visitation when occupancy is a little lower than in the summer high season.¹¹

Hosts on Airbnb know their guests and the sorts of activities that appeal to them and are developing a deep knowledge of their local cultural offer which venue programmers can help them with. All the meetups ended with agreement between hosts and programmers to work together in the future on joint marketing and to arrange regular meetups to share knowledge.

¹¹. See After-Hours event by season chart on Culture24Research Google drive

All the hosts we spoke to recommend the local cultural offer to their guests...

All the hosts we spoke to recommend the local cultural offer to their guests; in Manchester more hosts recommend a cultural activity to their guests immediately on arrival than don't (See Late Like A Local folder / Chart 1a on Culture24Research Google Drive). Many hosts interact with their guests in person which, as resources for visitor information centres in many locations dwindle, offers a wonderful first-hand resource for tourists to find more out about the place they are visiting from an expert.

Hosts also have a lot of information about their guests' backgrounds and are very familiar with the general profile of the kind of visitor their accommodation listing attracts. They are happy to share this relevant, and non-confidential, intel with venues' programmers.

A key insight to come out of all the meetups was the importance of the Chinese visitor market to the success of many hosts' accommodation listings. Hosts Gary and Jessica in Brighton, Mike and Rosemary in Manchester and Sue in Penzance all specifically referred to Chinese students and tourists as a significant source of income for their Airbnb listings. Other hosts talked about foreign visitors and students as being important demographics for them and our UK venue interviews confirmed that in Bath tourists form a large proportion of their visitor numbers.

Herein lies an opportunity to develop audiences, if venue programmers can work more closely with hosts in the future.

5. Economic impact

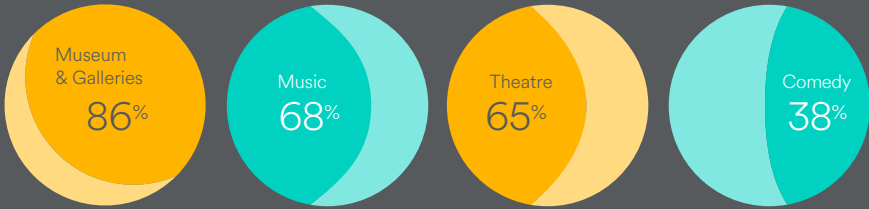
The Airbnb host survey respondents indicated that cultural tourists want to visit museums and galleries above other cultural genres and that a varied night-time cultural offer is essential or important.

86% of respondents (the top answer - respondents could choose more than one) included museums/galleries in their response to the question, "What sort of rich, cultural events do you recommend your guests take advantage of?" when offered the choice of museums/galleries, music, theatre, comedy or other (Chart 4).



Q. What sort of rich, cultural events do you recommend your guests take advantage of?

Chart 4

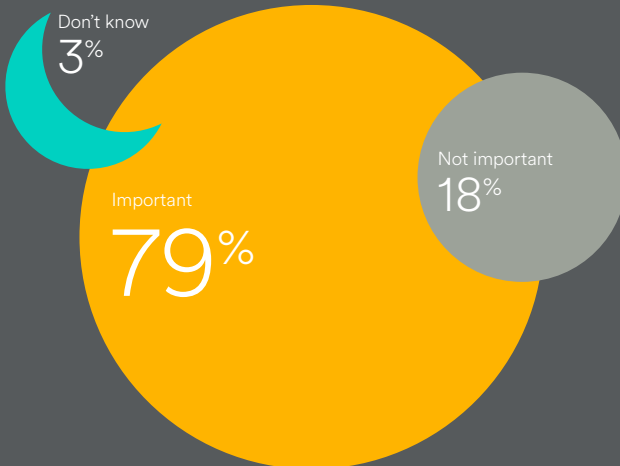


Analysis

The Airbnb host survey respondents indicated that cultural tourists want to visit museums and galleries above other cultural genres and that a varied night-time cultural offer is essential or important.

Q. Do you think it's important for your town to have a variety of cultural events available during the evening?

Chart 5



Analysis

Host respondents also rated a diverse night-time offer as an essential element of the local offer to their guests.

We calculate the current UK Lates event market to be worth £9.6m in ticket earnings annually

Combining these findings we can see that hosts on Airbnb think their guests value the museum/gallery experience highly, and appreciate the breadth of choice Lates contribute to the local night-time cultural offer.

We calculate the current UK Lates event market to be worth £9.6m in ticket earnings annually.¹² If the sector implements this report's, and the UK and International reports' recommendations and it leads to year-on-year growth in ticket capacity, sales and earnings of 5%, this will add an additional £7.7m to ticket income over a five-year period.

This increased economic activity will also lead to substantial secondary impact economic growth in: venue food and beverage income; and increased earnings for surrounding local businesses and supply chains.

¹² See 'How we calculated ticket earning value', Culture24Research Google drive

Conclusion

This research has taken a first step on the road to making connections between museums/galleries' night-time offer and cultural tourism. Hosts on Airbnb see the benefit of having a rich night-time cultural offer in their area and venue programmers are increasingly realising the potential that lies in the cultural tourism market.

The meetups produced useful, practical suggestions as to how to develop relationships between venues and hosts, such as tailored marketing and venue tours for hosts, and participants were keen to repeat the experience.

The wider research demonstrated that a lack of available data on all aspects of Lates, including where visitors live and if they are visiting from outside the locale, is a barrier to evidence-based decision making. More can be done to collect useful data that can be the basis for future developments.

Lates are an entry point into museums which appeal particularly to people who don't normally see museums as for them, and Airbnb is extremely attractive to people who want an experience that's off the beaten track. As museums seek to widen their appeal, and they programme more Lates to attract new audiences, cultural tourism is one area with enormous potential for growth.

Events, and particularly immersive experiences, increasingly drive visitation to new locations.

About Airbnb

Founded in 2008, Airbnb's mission is to create a world where people can belong anywhere when they travel by being connected to local cultures and having unique travel experiences. Its community marketplace provides access to millions of unique accommodations from apartments and villas to castles and treehouses in more than 65,000 cities and 191 countries.

With Experiences, Airbnb offers unprecedented access to local communities and interests, while Places lets people discover the hidden gems of a city as recommended by the people that live there. Airbnb is people powered and the easiest way to earn a little extra income from extra space in a home or from sharing passions, interests and cities.

www.airbnb.com

About Culture24

Culture24 is an independent charity that, through digital publishing, national campaigns such as Museums at Night, and action research projects, supports arts and heritage organisations to have the confidence, imagination and skills to connect meaningfully with audiences of today.

Since 2001 we have produced and maintained a digital data aggregation, publishing and distribution platform. This richly populated, highly structured data set contains venue information; collection overviews; event, exhibition & resource listings from and about 7,500+ UK arts and heritage organisations. It is the most comprehensive data set of its kind, offers a range of free & openly licensed API services and powers our own websites including:

MuseumsatNight.org.uk
MuseumCrush.org **and**
Show.Me.uk

Our work and assets place us in a unique position to map the sector's after-hours offer, canvass the opinions of UK and International programmers and visitors, and make recommendations to help develop the UK's museum/gallery Lates offer to be the best in the world.

www.weareculture24.org.uk



