

## Information, motivation and offer: getting group visits right at The Royal Collection

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“Information, motivation and offer equation: Why groups mean business at The Royal Collection” was part of the Cultural Symposium held at Tate Modern in 2010. At Windsor Castle, part of the Royal Collection, groups account for over a third of all visits and £3million in revenue. The Royal Collection addresses how to market to groups, organise groups and the benefits and issues that may arise in group ticket sales.

*The Audience Agency is a not-for-profit organisation created out of the merger between All About Audiences and Audiences London Plus in 2012.*





**Audiences London**

## **Wish you were here... Cultural Tourism Symposium**

for the Arts and Heritage in London, 25 May 2010, Tate Modern

### **The information, motivation, offer equation Why groups mean business for The Royal Collection**

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#### **About The Royal Collection**

The Royal Collection comprises **royal palaces, residences and an art collection**. Venues include: Buckingham Palace, Windsor Castle, The Queen's Galleries, Holyrood, Frogmore, Clarence House.

#### **Group visits to The Royal Collection**

Group visitors are very important to The Royal Collection. The collection welcomes nearly 2 million visitors each year and over 0.5 million are group visitors.

#### **What do groups want and need?**

Heritage sites perform better in the groups market than the galleries. For example, at The Royal Collection's biggest site Windsor Castle, groups account for over a third of all visits and over £3m in admissions revenue. At The Queen's Galleries in London and Edinburgh groups represent around half as much.

With this many group visits you'd think that The Royal Collection is pretty well set up to accommodate groups. However this wasn't always the case. They used to make Tour Operators book in writing in triplicate, pay in advance and they were then charged whether they visited or not! Things have come a long way since then.

Today The Royal Collection offers everything a Tour Operator or Group Travel Organiser might generally expect, such as a dedicated groups booking line, a groups counter, voucher system for volume clients, plus the facility to reserve and book online. There are also regular communications – e-newsletters on new visits, opening times, last minute closures, image-download facility – and with good reason – groups are great business.

#### **How does the groups market breakdown?**

You've probably got a picture in your head of a typical group – perhaps a gaggle of gossiping women with blue rinses? A noisy, tangle of French school children brandishing rucksacks with little regard for those around them? Sound familiar?

These two ends of the groups spectrum neatly represent the two principal sources of groups business – the oldies as typical of Group Travel Organisers and Tour Operators typically bringing foreign school groups. What's the difference?

### **Group Travel Organisers**

- UK based; c11k organisers
- Market valued at £142m
- Influenced by Word of Mouth and personal experience
- Print still more useful than online communication
- Day trips increasing at expense of short breaks
- Biggest proportion (64%) interested in historic buildings and (41%) interested in museums and galleries
- Looking for new experiences
- Spring and autumn most popular seasons for group trips
- Hygiene factors more important, even than price, when considering a visit

### **National Group Travel Report, August 2009 showed that:**

- Biggest segment is retirement clubs, followed by social clubs and special interest groups, but very broad range of groups
- Typically organise a group of 40-50 max, 3 times a year within 2.5 hour drive time and spend £26 per person for a day visit – price is very important
- Over 75% are 65+
- Really need a Group Travel Organisers' version of Trip Advisor. – as groups are quite cautious
- Day trip increase good for London attractions and opportunity to offer new visits
- Tend to book January to March, but would you believe that in the survey Toilets/rest facilities were rated more important than the group admissions discount

### **Tour Operators**

- UK and overseas operators
- Little market data, Visit Britain 2003 survey on overseas visitors:
  - 11% of in-bound holiday market is tour groups
  - most likely to visit between April and June (37%)
  - most likely to be either children/students or over 65
- Offer day trips/groups series/sightseeing excursions
- Commercially driven, influenced by price
- More complex supply chain, but professionally organised
- Like add-on exclusive extras
- Initial barriers to entry for new offers

### **What's good about groups?**

- Offer good ROI overall
- Provide marketing reach and access to new markets
- Group Travel Organisers are very efficient for booking administration
- Tour Operators offer long term, regular business
- Book well in advance
- Often travel in shoulder months
- Safe and environmentally friendly source of business

- One 'groups guide', circulated at a meeting can yield tens of visitors through the recommendation of the tour leader
- Exposure in a tour operators brochure distributed overseas reaches an audience that we find it uneconomic to target
- Tour Operators are source of new regular business year after year. May only meet with them once a year, if that.
- Once you have one group customer they tend to be quite loyal and a reliable source of regular visits, however, the hard part is getting onto their itinerary in the first place (sometimes they want to book further in advance than is possible!)
- Can use to take less saleable slots
- Smart Move campaign – aims to double bus and coach use in Europe - latest drive to make coach tourism sexy and to advocate its green credentials
- Coaches are the most efficient and emit the lowest CO2 emissions of any collective transport
- A bus can replace up to 30 cars on the road in terms of occupancy, but only take the space of 3

### **Issues with groups**

- Lower yield
- Poor secondary spend (can deliver poor retail spend due to strict itineraries)
- Operational issues (e.g. day trip groups all arrive at the same time at WC!)
- Expect special access requirements
- Difficult to sell product in the short term
- More likely to need language interpretation
- As a registered charity Gift Aid very important and we can't collect (worth additional 28% of every ticket)
- Overall there are limitations for large numbers of groups at a historic attraction

### **Attracting groups**

- Group-friendly structure and practices
- Keen prices
- Industry collaboration and participation in trade events
- Consumer demand
- Financial incentives
- Combination tickets within your own portfolio
- Product development
- Marketing partnerships with third parties

### **Top tips**

The Royal Collection has found that the following ways of working have been helpful in attracting more group visitors:

- **Working with the local council**  
*The Royal Borough of Windsor and Maidenhead organises a number of Group Travel Organiser familiarisation trips every year; and built an award-winning coach park in 1981.*
- **Meeting operators through European Tour Operators Association or UK Inbound, as well as fellow attraction-providers**

*Exhibit at trade shows and participating in the occasional overseas sales mission*

- **Programming blockbuster exhibitions (or equivalent) which drives consumers**  
*With a slightly less interesting offering, you may have to offer attractive discounts to make price the crucial factor – usually all you need to attract Tour Operators*
- **Offering combined tickets**  
*e.g Buckingham Palace Summer Opening with Royal Mews. Tour Operators want Buckingham Palace but have to take Royal Mews too*
- **Be aware that attracting Group Travel Organisers needs a bit more work on the product and new ways/themes to attract them.**
- **You can market test new product offerings with groups before rolling out to all your customers**  
*Last year The Royal Collection launched Garden Tours at Buckingham Palace to groups only, and then did the same again this year. It has come to be seen as the best way to visit.*

### **What makes a successful Group Visit Combination Package?**

Groups always want something new, so The Royal Collection has been developing combined group visit packages.

They have found that these work well when there is a complimentary combination e.g. Frogmore House and Savill Garden which is a long running group product.

They ran a joint ticket campaign on the back of the lending of some major Van Dycks to their exhibition early last year. This had limited success – perhaps because the two experiences on offer were too similar.

The Royal Collection's current combined ticket has been a complete sell out by contrast. A talk and a visit to The Queen's Gallery followed by a tour of the Royal Albert Hall is complementary and a much cheaper experience.

### **Trend and Opportunities**

- **Individuals put together as groups by Tour Operators**  
*Some coach operators are now offering multiple pick-ups of individuals, then bring them to destinations as a group then they separate, but re-join as a group to enter an attraction. NB needs a lot of work by tour manager to organise the group*
- **Sightseeing tours not always including entrances**  
*This is the day tour excursion equivalent of the low cost airline where only the transport is included. They take you to Stonehenge, Bath, Windsor etc but it's up to you if you want to go in. In this example, it's not so good for Windsor Castle, but could be an opportunity for other locations if this trend continues*
- **Travel Trade waking up to the 'arts blockbuster' (e.g. The King Tut and Last Emperor exhibitions)**  
*They are looking for new product – opportunity for arts events with broad appeal. Can*

*market any spare capacity (your un-sold slots at unpopular times) to this market. The Travel Trade likes good PR/marketing campaigns to run off the back of. They need a longish run or to know timing well in advance.*

- **Cruise ship on-shore excursions programme**  
*Cruising is a growing market and their passengers are the right demographic for arts organisations. Only trouble is that they can travel in rather large numbers so you need to be ready for them! When looking at the daily visitor numbers for Holyrood House it's easy to see immediately when a cruise ship has been in town, the impact is that dramatic.*
- **Growth of non-English speaking market**  
*Have to think outside the US market for overseas groups who are increasingly coming from far east and other developing markets*
- **Groups becoming smaller**  
*These markets often run much smaller groups, found this particularly with the Chinese market.*

#### **Useful websites**

Group Travel Organiser: [www.grouptravelorganiser.com](http://www.grouptravelorganiser.com)

European Tour Operators Association: [www.etoa.org](http://www.etoa.org)

In particular, take a look at their 'Groups Means Business: Charter for Successful Tourism' which outlines 10 Key Points for Successful Group Tourism in Cities.

Smart Move Campaign: [www.busandcoach.travel](http://www.busandcoach.travel)

#### **Want more help reaching cultural tourists?**

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

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

Email: [info@audienceslondon.org](mailto:info@audienceslondon.org)

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