



FORESIGHT is a monthly commentary on significant issues within the tourism sector. Each month, 'Market Focus' discusses economic, social and political factors that underlie demand for tourism now and in the future. In addition, a spotlight is focused on a significant tourism issue. This issue is devoted to investigating the results of the 'Taking Part' Survey commissioned by the Department for Media Culture and Sport – a survey that helps us understand the true importance of Britain's cultural and heritage 'assets' to the visitor economy.

The 'Taking Part' Survey

Conceived not as a tool for better understanding domestic tourism preferences but for monitoring whether or not the Government's stated desire to ensure all sectors of society are able to participate in cultural and sporting activities, the 'Taking Part' Survey can throw up some fascinating insights, ranging from how many English adults make use of our diverse cultural and heritage 'tourism product' through to what type of socio-demographic characteristics are most closely correlated with visits to castles, carnivals or craft exhibitions.

About the survey

The Taking Part Survey is a tool designed to help the Department for Culture, Media and Sport monitor progress against a Public Service Agreement target 'to increase the take-up of cultural and sporting opportunities by adults and young people aged 16 and above from each of the priority groups'.

The data presented here is based on the first full year of the survey undertaken between July 2005 and October 2006, during which period 28,117 forty-minute face-to-face interviews were conducted with residents of England aged 16 or over. The focus here is on those dimensions of the survey that touch tourism most closely; visits to museums and galleries, visits to sites with an historic environment and visits to 'arts events'.

Lots of people do it

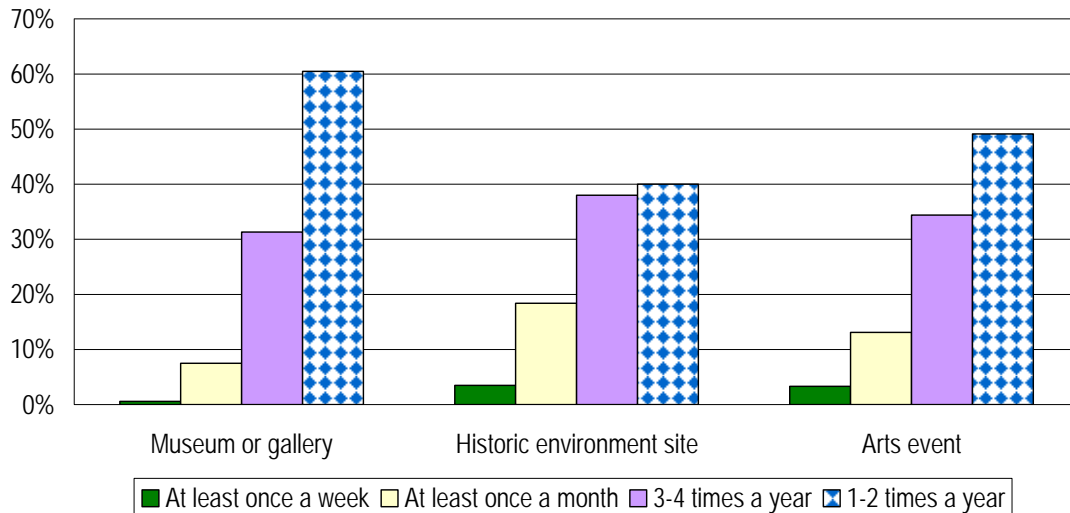
We can see from the table that more than 40% of adults in England attended a museum or gallery in the past twelve months.

	% adults attending in past year	number of adults attending in past year (m)
Museum or gallery	42%	16.8
Historic environment site	70%	27.7
Arts event	67%	26.4

However, when it comes to visiting historic environment sites or arts events we find that more than two-thirds of all adults had done so over the past year, equivalent to more than 26 million people sampling these forms of tourism product. This only tells us how many visited at least once, not how often the activity was undertaken, but from the following chart it becomes clear that nearly 20% of those visiting historic environment sites did so at least once a month,

roughly a third of those visiting arts events did so three to four times per annum, but visits to museums and galleries happened rather less frequently, with six-in-ten of those doing so visiting only once or twice a year.

Frequency of attendance for those attending at least once in past year

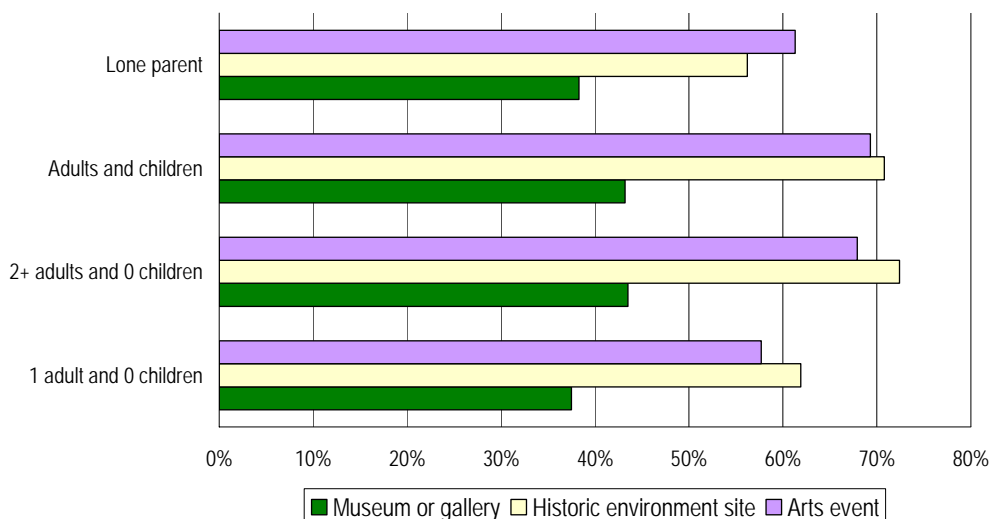


Characteristics of those attending

The following series of charts explore the socio-demographic characteristics of those who had attended each of the different forms of ‘tourism product’ during the past year.

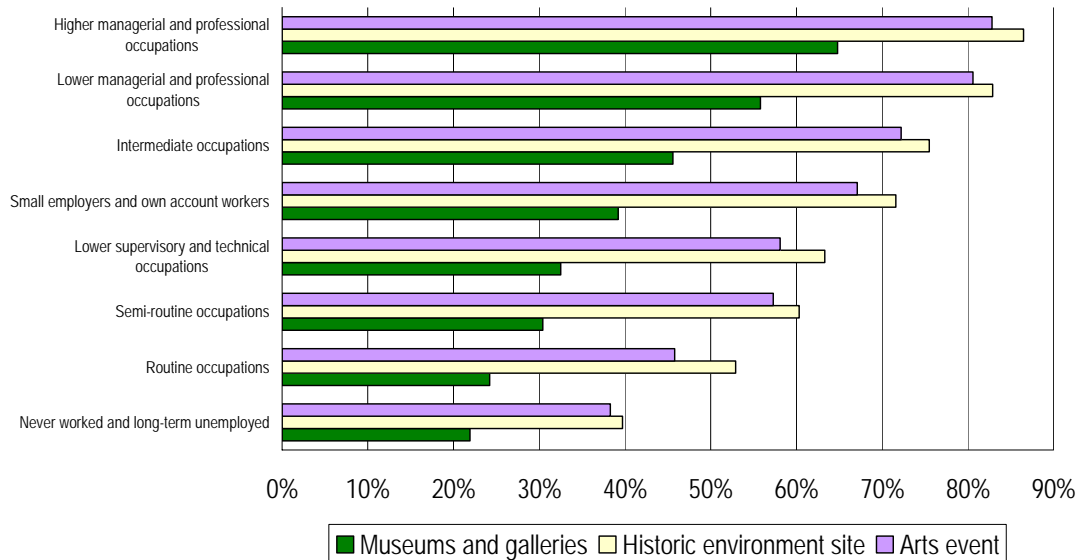
Firstly looking at ‘household structure’ it is clear that households containing both adults and children, along with those containing two or more adults but no children, are more likely to attend each type of location or event than those with other types of structure. Lone parents are the least likely to attend an historical environment site (although 56% had done so) whereas single person households were the least likely to attend museums and galleries or arts events.

Attendance by household structure



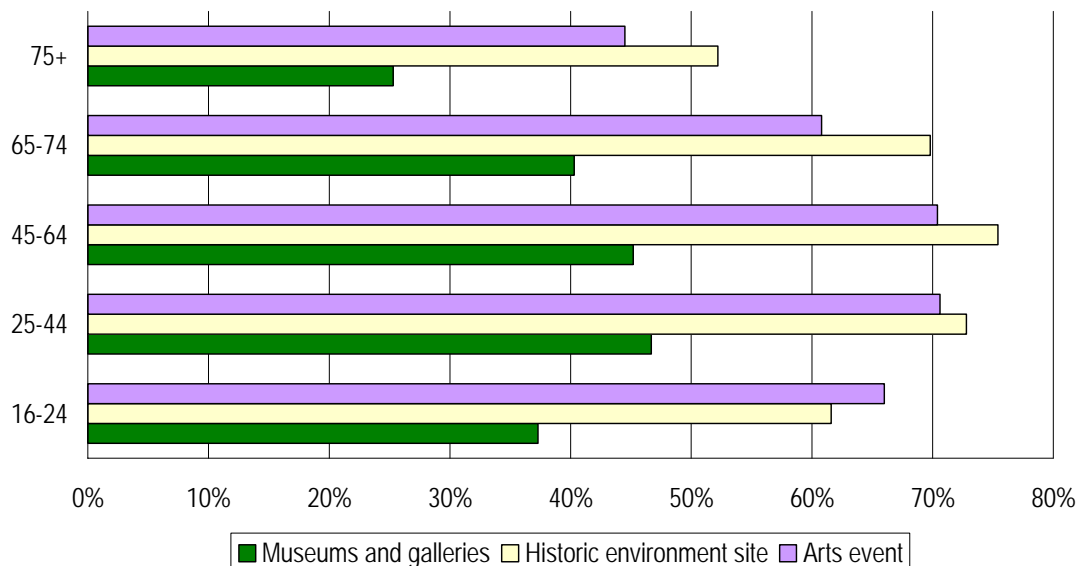
In terms of socio-economic groupings a uniform pattern emerges whereby the 'higher' the socio-economic grouping of the respondent the greater the likelihood of attending each type of location or event under investigation. Another common theme is that within each of the socio-economic groupings attending an historic environment site is done by a larger proportion than is attending an arts event, which in turn is a more common activity than is attending a museum or gallery. Nearly nine-in-ten of those with a higher managerial or professional occupation attended an historic environment site in the past year, whereas only one-in-five of the long-term unemployed had attended a museum or gallery in the past year.

Attendance by Socio-economic group



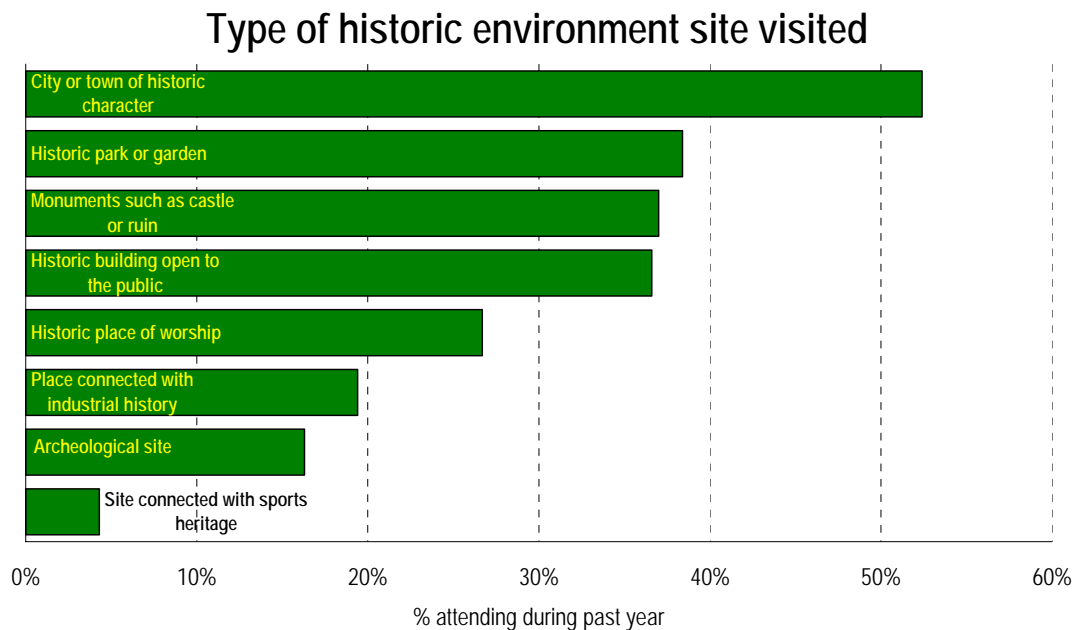
In terms of age groups those 45-64 are most likely to have attended an historic environment site in the past year (75%), but it is those aged 25-44 who are most likely to attend museums and galleries (47%).

Attendance by age group



What type of 'historic environment site'?

It is possible to dig beneath the surface of the data to investigate the different types of historic environment site visited over the past year. The following chart reveals that a little over half of respondents had visited a city or town of historic character in the past year, with more than one-in-three having visited a historic park or garden, a monument such as a castle or ruin and historic building open to the public. Only a minority, 4%, had visited a site connected with sports heritage.



What type of 'arts event'?

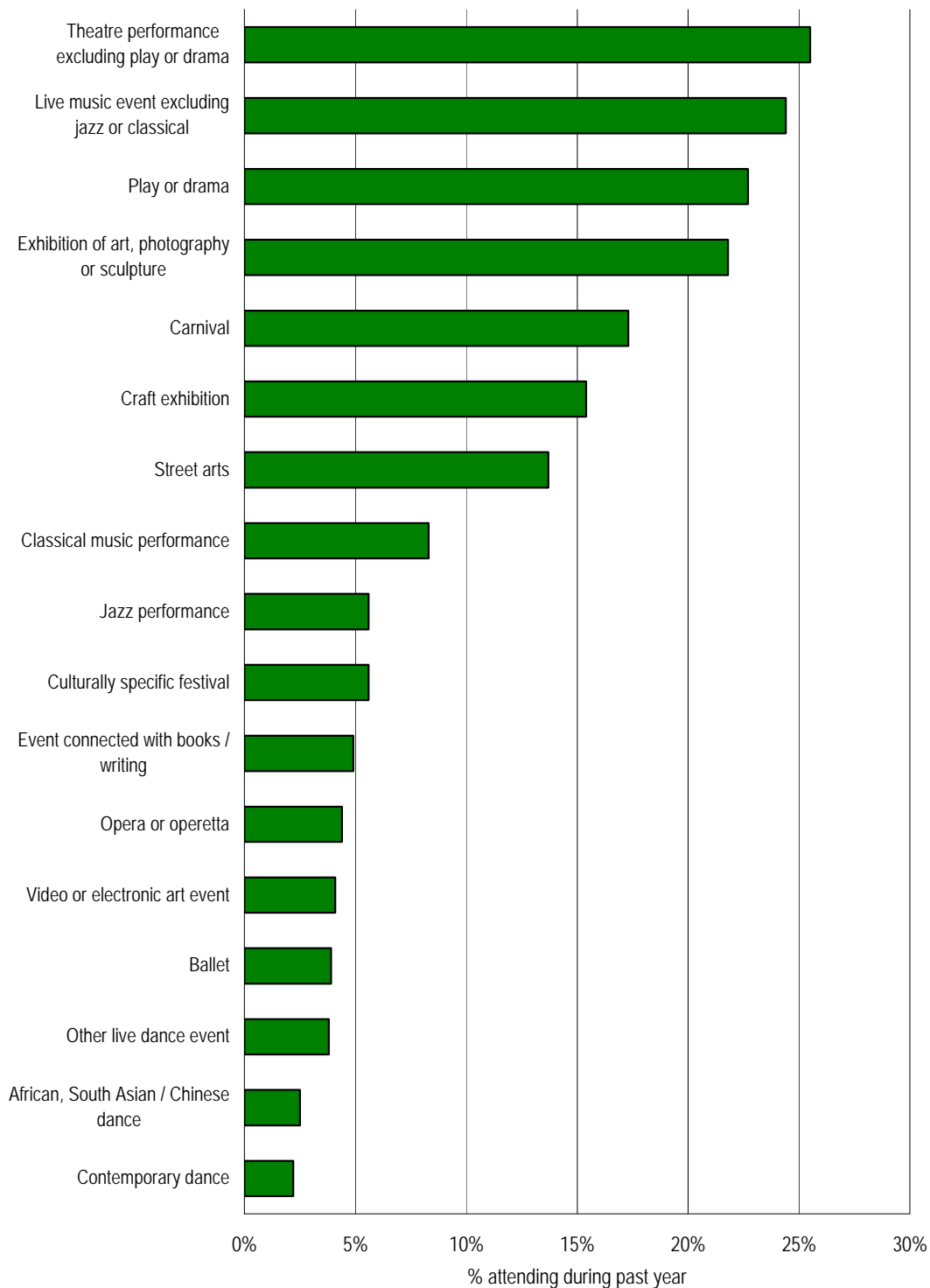
Likewise we can look at a range of different types of 'art event' to see which were those most commonly attended by adults living in England over the course of a year. The chart overleaf splits 'arts events' down into no fewer than seventeen separate categories. The most popular types of art event were theatre performances (both plays or dramas and other types of performance, for example pantomimes) and live music events (excluding jazz and classical), which attracted around a quarter of the adult population to attend at least once in the past year.

Carnivals were attended by 17% of adults, slightly more than attended a craft exhibition or street arts event. Dance events, ballets and opera were minority pursuits, attracting less than one-in-twenty of the population to an event during the year.

How do Britons rate Britain for culture and heritage?

So nearly 28 million adults in England attend an historic environment site over the course of a year, 26 million attend an arts event and 17 million go to at least one museum or gallery, but how are these 'products' rated? We can draw on a couple of sources of evidence here, starting with the Anholt-GMI Nations Brand Index Survey in which an on-line panel are quizzed about different dimensions of Britain.

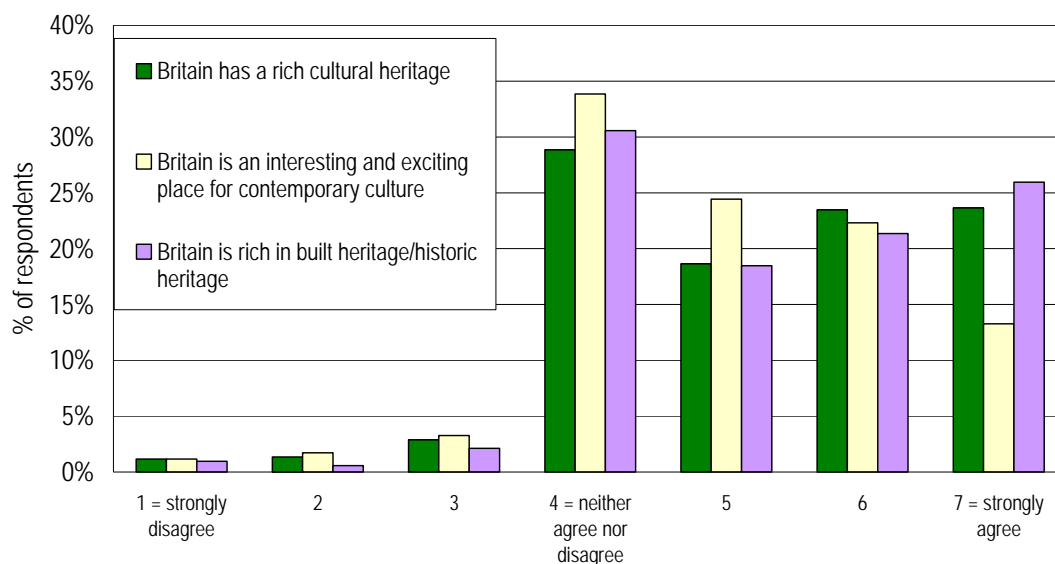
Type of arts event attended



Analysis of the most recent wave of the survey conducted in late 2007 reveals that Britons (based on a sample size of 520 respondents) believe that they live somewhere with very strong cultural and heritage 'product'. Responses to three key questions contained in the survey are shown in the following chart, and it is clear that there was generally strong agreement with each of the statements, but particularly so for the statements asking whether Britain was rich in cultural heritage and rich in built/historic heritage. The situation for contemporary culture was a

little less upbeat but far more respondents (59%) agreed that Britain was an interesting and exciting place in this regard than disagreed (6%).

Culture and heritage in Britain



Recent research conducted on behalf of VisitBritain by TNS provides further evidence regarding the strength of Britain's cultural and heritage product. Detailed analysis of what 'drives' the overall rating of the holiday experience in Britain among British respondents helps to demonstrate strengths and weaknesses. This is done by assessing the impact on customer retention and stated importance of different destination attributes.

Key 'strengths' for Britain included 'opportunities to visit museums, galleries and contemporary arts' and 'opportunities to visit famous buildings and monuments', that is to say these attributes were highly rated, strongly correlated with customer retention and stated as important by respondents when considering different destinations.

Cultural and heritage attractions are very definitely a cornerstone of Britain's tourism offer and are experienced by tens of millions of Britons each year from all walks of life and parts of the country. It is therefore essential that not only are these 'products' maintained, cared for and further developed, but that they continue to offer the visitor value for money and a quality experience.

Top visitor attractions

Each summer VisitBritain publishes the result of an annual Visitor Attraction Survey for England with the most up-to-date figures being for 2006. An analysis of the results (note that not all attractions choose to participate in the survey) reveals that the top twenty 'paid admissions' attractions include eight which can readily be described as either 'heritage' or 'cultural' in nature; Tower of London (more than two million visits), St Paul's Cathedral, Canterbury Cathedral, Westminster Abbey, Windsor Castle, York Minster, Stonehenge and the Roman Baths in Bath.

For many Britons thinking about holidaying at home 'value for money' is a key concern, so it is apposite to note that many of Britain's top museums and galleries are free to enter. The Visitor Attraction Survey top twenty 'free admission' attractions in 2006 included twelve cultural or heritage attractions; Tate Modern (5.7 million visits), British Museum, National Gallery, Natural History Museum, Science Museum, Victoria & Albert Museum, National Portrait Gallery, Tate Britain, Oldway Mansion, National Railway Museum, The Lowry and St Martin-in-the-Fields.

Capital of Culture

Throughout 2008 Liverpool will be home to some of the most important cultural events taking place in Britain courtesy of the city being European Capital of Culture. In total there will be some 350 events covering music, visual arts, performing arts, street theatre, sport, architecture and heritage. Some events will be small and local in nature but others will be of international significance - indeed, Tate Liverpool forecast record visitor numbers in excess of 100,000 to its exhibition on artist Gustav Klimt. It is reckoned that during the first four months of 2008 2.75 million people attended a cultural event or venue in Liverpool (25% up on 2007), with many of the 'set piece' events planned for the year still to come.

National Lottery

The March 2006 edition of *Foresight* took a detailed look at the contribution that National Lottery funding makes to Britain's visitor economy, but it is again worth highlighting the breadth of ways in which cultural and heritage tourism 'product' is fostered and protected through National Lottery grants.

Recent grants have included £21m from the Heritage Lottery Fund to help the Mary Rose Trust bring the Mary Rose and thousands of rare Tudor treasures under a single museum roof within Portsmouth Historic Dockyard and £1m of Arts Council lottery backed funding has facilitated the conversion of a Grade II listed church in Scunthorpe into a visual arts centre attracting around 50,000 annual visitors.

Learn more...

More information about the 'Taking Part Survey', including provisional findings from the second year of the survey and rates of participation in other types of activity not dealt with in this edition of *Foresight*, can be found from dedicated pages on the Department for Culture, Media and Sport website: www.culture.gov.uk

VisitBritain will be hosting a 'Heritage and Cultural Tourism Business Forum' on 8th July at the Royal Society of Arts in London. This one day business forum is designed to help tourism businesses identify new ways of promoting their organisation and developing imaginative packages and services to ensure the growing opportunities presented by the heritage and cultural tourism market can be maximised. To find out more about the event and to book a place visit: <http://www.tourismtrade.org.uk/spotlightstory/culturaltourismworkshop.asp>

Download earlier editions of FORESIGHT: www.visitbritain.com/research

Issue 1	November 2003	Market Focus	Issue of the Month
Issue 2	December 2003	USA, Canada and Mexico	Implications of an ageing population in Britain
Issue 3	January 2004	France, Italy, Portugal and Spain	Airport capacity in Britain
Issue 4	February 2004	Poland, Russia, China and South Korea	Visits to Britain by British Nationals living overseas
Issue 5	March 2004	Britain	School holidays and their impact on seasonal spread
Issue 6	April 2004	Australia and New Zealand	West Nile Virus
Issue 7	May 2004	The EU Accession States	The Internet Part 1: Consumers
Issue 8	June 2004	South Africa, Nigeria, Kenya and Ghana	The Internet Part 2: Businesses
Issue 9	July 2004	India and Pakistan	Trends in Cross-Channel Travel Behaviour
Issue 10	August 2004	Belgium, Netherlands, Luxembourg and Ireland	Cost of visiting Britain compared with other destinations
Issue 11	September 2004	Japan, Hong Kong, Philippines and Taiwan	What might climate change mean for tourism in Britain
Issue 12	October 2004	Brazil, Argentina, Chile and Venezuela	London's Olympic Bid – implications for British Tourism
Issue 13	November 2004	Norway, Sweden, Denmark and Finland	Smoking in public places
Issue 14	December 2004	Britain	Outlook for inbound tourism to Britain in 2005
Issue 15	January 2005	UAE, Saudi Arabia, Kuwait and Iran	Inbound tourism and the value of Sterling
Issue 16	February 2005	Germany, Austria and Switzerland	Britain's ethnic diversity
Issue 17	March 2005	Malaysia, Thailand and Singapore	Britain's transport infrastructure
Issue 18	April 2005	Greece, Romania, Bulgaria and Croatia	Foreign Direct Investment & inbound business tourism
Issue 19	May 2005	Israel, Egypt and Turkey	Inbound study visits
Issue 20	June 2005	Poland, Czech Republic and Hungary	Low-cost Airlines
Issue 21	July 2005	USA, Canada and Mexico	Weddings, Stag Weekends and Hen Weekends
Issue 22	August 2005	France, Italy, Spain and Portugal	The Day Visit Market
Issue 23	September 2005	Latvia, Lithuania, Estonia, Ukraine and Belarus	Quality
Issue 24	October 2005	Russia and China	Daylight Saving
Issue 25	November 2005	Australia, New Zealand and South Africa	Outlook for Inbound Tourism in 2006
Issue 26	December 2005	India, Sri Lanka and Bangladesh	Twenty-five years of Inbound Tourism
Issue 27	January 2006	Benelux and Ireland	Tourism Satellite Accounts
Issue 28	February 2006	Japan, South Korea and Hong Kong	Tourism and the Disability Discrimination Act
Issue 29	March 2006	Brazil, Argentina and the Caribbean	Tourism and the National Lottery
Issue 30	April 2006	Nordic region and Iceland	Next generation aircraft
Issue 31	May 2006	Central Europe	The cruise line boom
Issue 32	June 2006	UAE, Kuwait, Bahrain and Oman	The power of football
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Issue 48	October 2007	Outlook for Inbound Tourism in 2008	The British Weather
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Issue 51	January 2008	The Middle East	Domestic consumers and the 'credit crunch'
Issue 52	February 2008	Inbound visitors staying 15+ nights	Special edition: Business tourism
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