

FORESIGHT is our monthly commentary on significant issues within the inbound tourism sector. This month our first article profiles inbound visitors who went to either a museum or art gallery in 2009, with the second article moving on to look at the characteristics of inbound visitors enjoying our built heritage, be this castles, historic houses or religious buildings and monuments.

Museum and art gallery visitors

As discussed in great depth in our Culture and Heritage Topic Profile, Britain's culture and heritage offer is a key motivator for many inbound visits to Britain, with worldwide recognition that we excel on many aspects of both culture and heritage. In particular our world-class museums and art galleries are known around the globe, but how many visitors to Britain actually visit one during a trip?

In 2009 VisitBritain sponsored a question on the International Passenger Survey¹ that asked about a range of activities that visitors may have undertaken during their stay. The figures show that, among the 29.9 million visits in 2009, 7.7 million included time visiting a museum and 4.2 million an art gallery.

Top markets

Enjoying our museums and art galleries is definitely a mainstream rather than niche activity for inbound visitors. The following brace of tables show figures for the top ten markets in terms of visits to museums and art galleries respectively. We can see that just under one million visitors from each of France and the USA visited a museum, with both Germany and Spain also generating well over half a million museum visits. For art galleries the USA replaces France in top spot with well over 500,000 visits, but Germany and Spain once again hold third and fourth place. Although not appearing in the top ten in terms of volume, it is interesting to note that nearly two-thirds of visits from both Brazil and Argentina involved time spent in a museum.

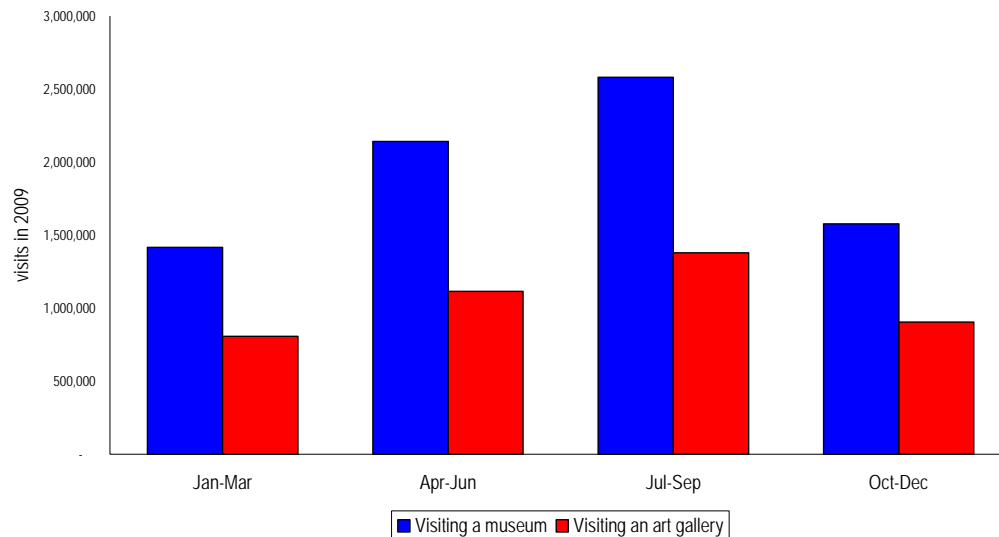
Museums	
Market	Visits
France	959,110
USA	955,882
Germany	788,374
Spain	577,639
Italy	416,213
Netherlands	384,106
Australia	319,001
Irish Republic	230,783
Belgium	213,153
Canada	209,383

Art Galleries	
Market	Visits
USA	568,826
France	471,836
Germany	350,228
Spain	347,469
Italy	277,487
Australia	217,354
Netherlands	171,744
Poland	136,406
Canada	134,999
Irish Republic	120,998

Visit characteristics

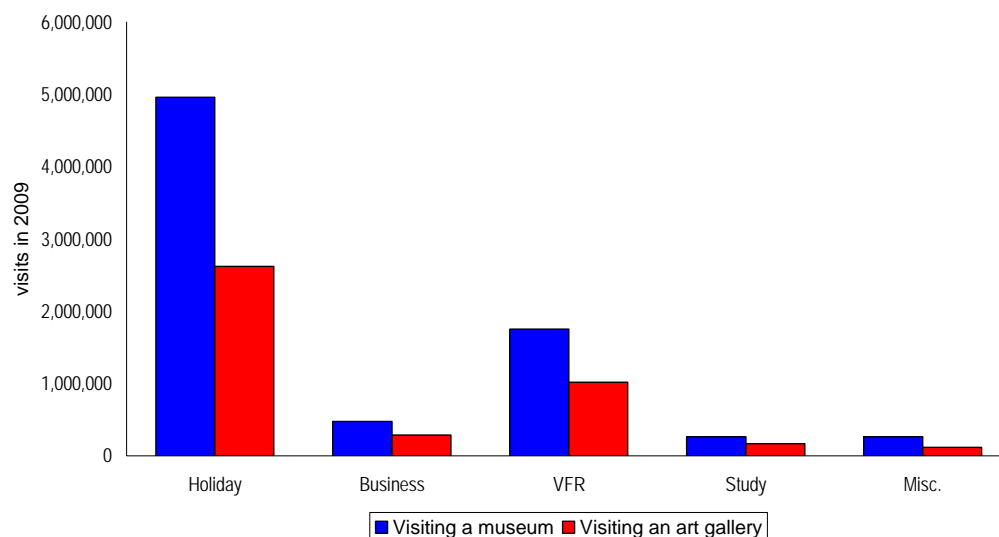
We can observe from the chart that for both museums and art galleries the most popular time to visit is July to September, with the fewest visits being during the January to March period. However, it is clear that visiting museums and art galleries is an activity in which inbound visitors indulge throughout the year, with the fact that many national museums offer free admission and an indoor option for cool or rainy days helping to ensure good seasonal spread.

Seasonality



Why the visitor has travelled to Britain plays a strong role in determining what they do during their trip. We can see that visitors who are here on holiday make up the bulk of visits to museums and art galleries, though with a sizeable number of visits by those here to visit either friends or relatives.

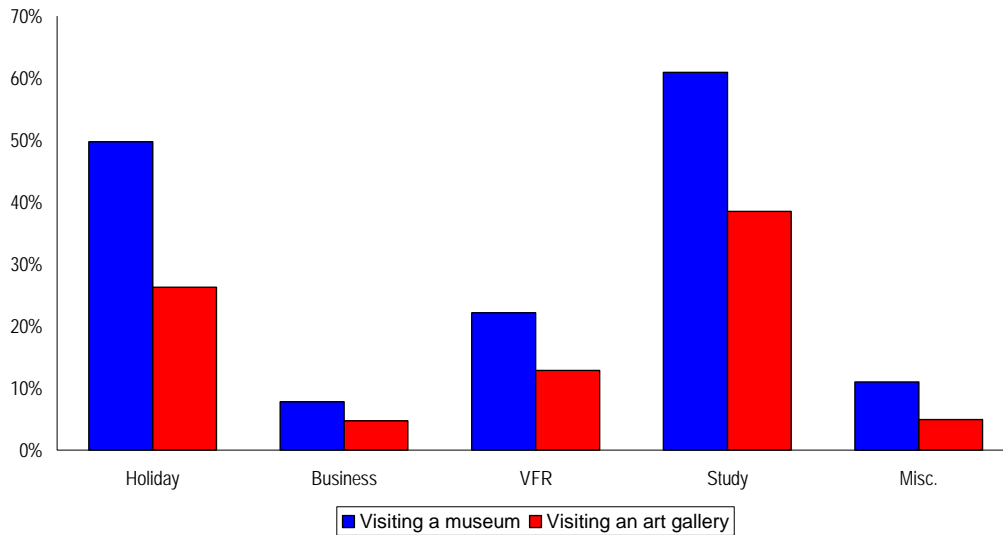
Journey purpose



The insight we gain from looking at a chart can depend very much on the way in which data is presented. The following chart illustrates this point, with the share of visitors within each broad

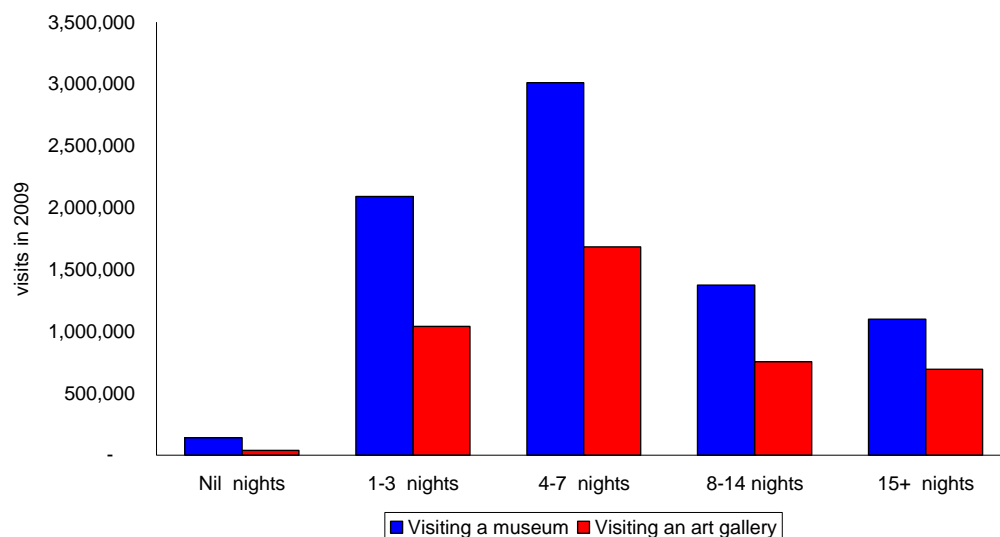
journey purpose category who visit either a museum or art gallery plotted. Here we can see that while one-in-two holiday visitors enjoy a museum and one-in-four an art gallery, those in Britain to 'study' have a higher propensity to include museum and art gallery visits on their itinerary (61% and 39% respectively). Less than one-in-ten business visitors goes to either a museum or art gallery.

Proportion undertaking activity by journey purpose

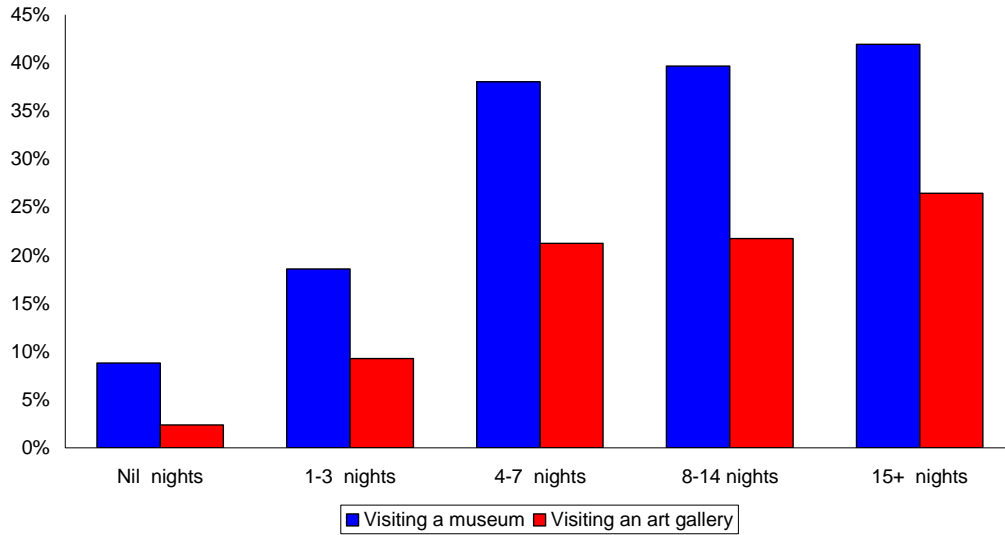


Taking the same approach to displaying figures on the duration of stay profile for visitors who go to a museum or art gallery reveals that the bulk of visits are by those in Britain for between 4 and 7 nights, but that the longer the duration of stay, the greater the likelihood of a visit to both museums and art galleries, with 42% of 15+ night stays including time in museums and 26% in art galleries.

Duration of stay



Proportion undertaking activity by duration of stay

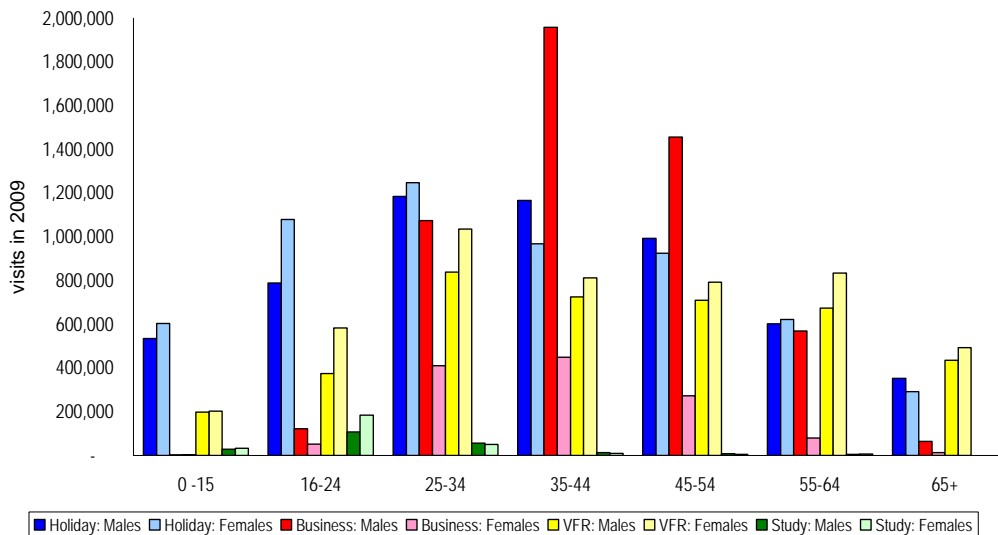


Visitor characteristics

We need to remember that visitor characteristics are influenced by the nature of a visit, in particular journey purpose. As such it is important to recognise that the age and gender profile of visitors coming to Britain for a holiday is different to that for visitors who are here on business.

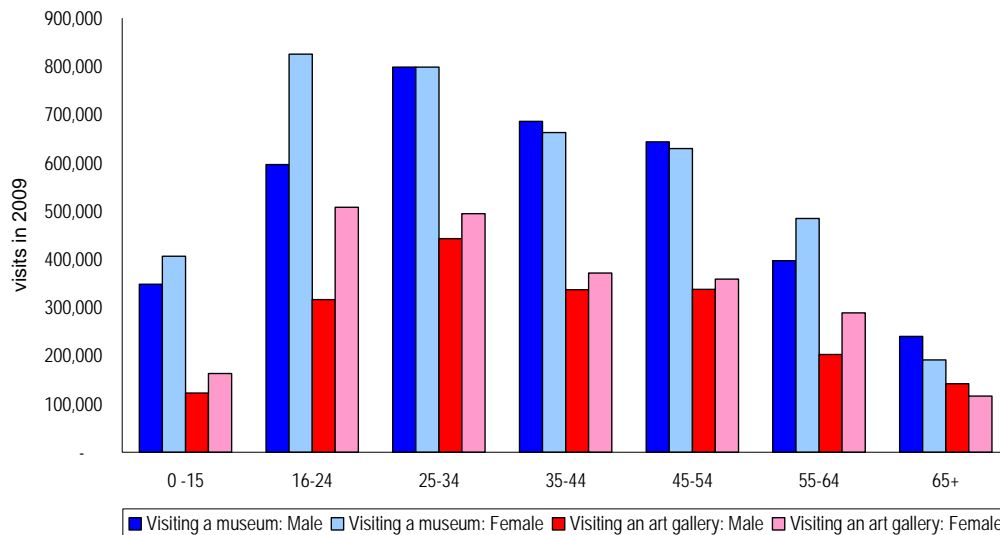
To illustrate this point the following chart shows the number of visits by journey purpose broken down by age and gender. It is clear that roughly equal numbers of males and females holiday in Britain within each age group, but that when it comes to business visits males totally outnumber females, and that these males are very likely to be aged 35-54. For VFR trips slightly more females than males visit with a fairly uniform age distribution.

Age and gender by journey purpose

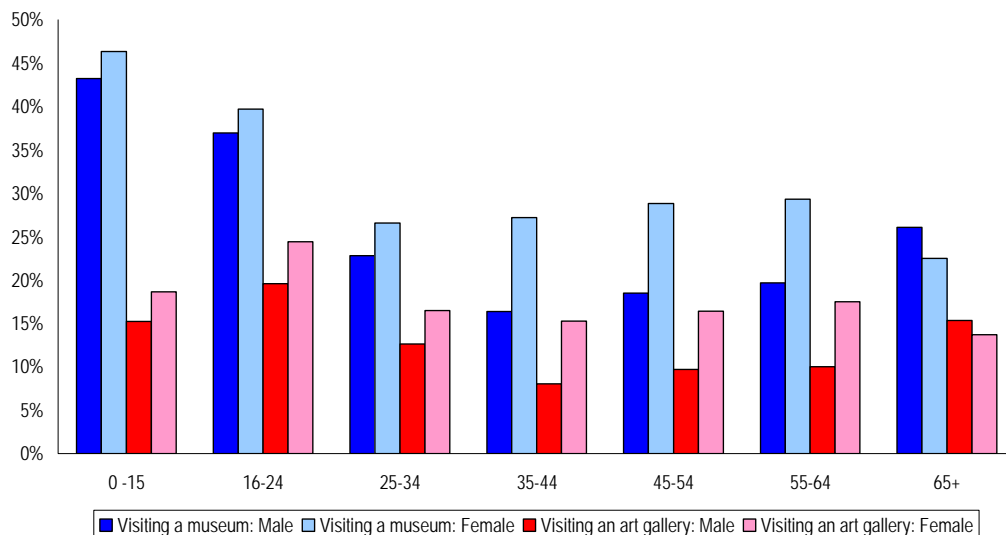


The following chart presents the age and sex distribution of visits to museums and art galleries based on visitors across all journey purposes. The second chart presents the proportion of visitors in each age group who undertook the activity. We can see then that broadly equal numbers of males and females visit both museums and art galleries within each age group with the exception of more females aged 16-24 than males of this age group doing so. In terms of the proportion of visitors from each gender and age group we discover that females are more likely to visit both museums and art galleries for all age bands except for the 65+ group.

Age and gender



Proportion undertaking activity by age and gender



Value

Building on the estimate presented in our Culture and Heritage Topic profile of the 'worth' of culture and heritage by looking at the share of such activities undertaken by inbound visitors that is a visit to either a museum or art gallery suggests that in 2009 the pull of Britain's diverse museums and art galleries helped to secure £1 billion of inbound visitor spending.

Built heritage visitors

If anything Britain's built heritage has even more resonance around the globe than our museums and art galleries, be this built heritage such as Stonehenge, Westminster Abbey, Edinburgh Castle or Chatsworth House. One of the many positives relating to the pull of our built heritage is that every part of Britain has something to showcase, whether it is stone circles in the Western Isles of Scotland, cottages built of Cotswold stone in Gloucestershire or rejuvenated buildings from Britain's industrial heritage in cities such as Liverpool.

Among the activities that inbound visitors to Britain were asked about during 2009 courtesy of VisitBritain sponsored questions included on the International Passenger Survey were three relating to our 'built heritage'. Respondents were asked if they had visited 'religious monuments/buildings', 'a castle' or 'an historic house'. The figures show that among the 29.9 million visits in 2009, 6.4 million visited a religious monument or building, 5.8 million visited a castle and 5.0 million an historic house.

Top markets

Akin to museums and art galleries, enjoying our built heritage is a mainstream rather than niche activity for inbound visitors. The following trio of tables show figures for the top ten markets in terms of visits to each the three built heritage 'products'. We can see that visitors from the USA make more visits to each aspect of built heritage than do visitors from any other market, with France and Germany jostling for second spot. Australia and Canada are the only two long-haul markets besides the USA to make an appearance in the top tens, but it is of note that around one-in-three visits from both South Korea and South Africa involves visiting a castle.

Religious monuments/buildings	
Market	Visits
USA	861,878
France	804,751
Germany	724,323
Spain	465,571
Netherlands	352,869
Italy	332,512
Australia	317,642
Irish Republic	245,414
Canada	213,066
Belgium	187,465

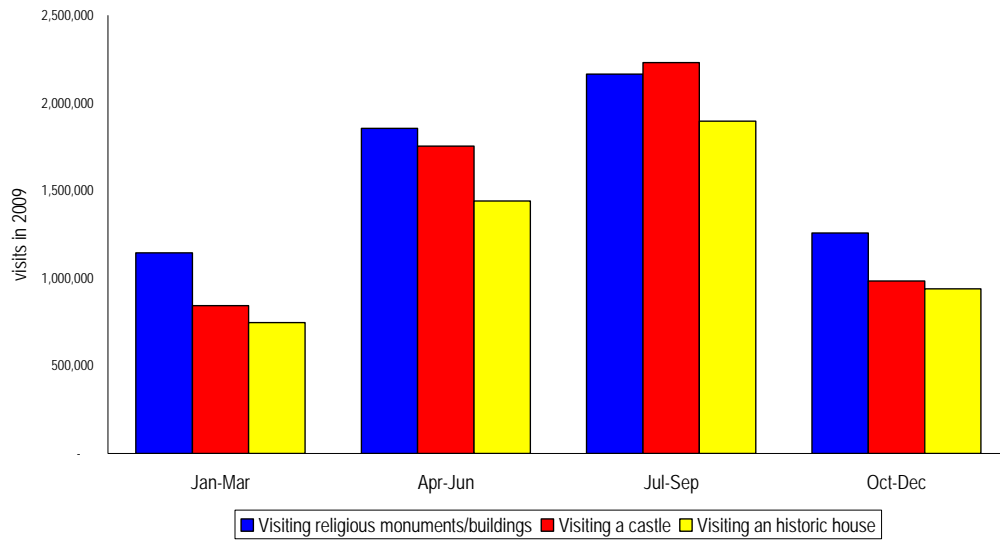
Castles	
Market	Visits
USA	829,785
Germany	765,347
France	607,344
Spain	365,185
Australia	318,397
Netherlands	294,243
Italy	247,583
Canada	209,093
Irish Republic	172,704
Poland	157,859

Historic houses	
Market	Visits
USA	666,400
Germany	642,339
France	549,126
Spain	319,180
Australia	273,340
Netherlands	251,927
Italy	201,174
Canada	160,924
Irish Republic	148,306
Belgium	124,340

Visit characteristics

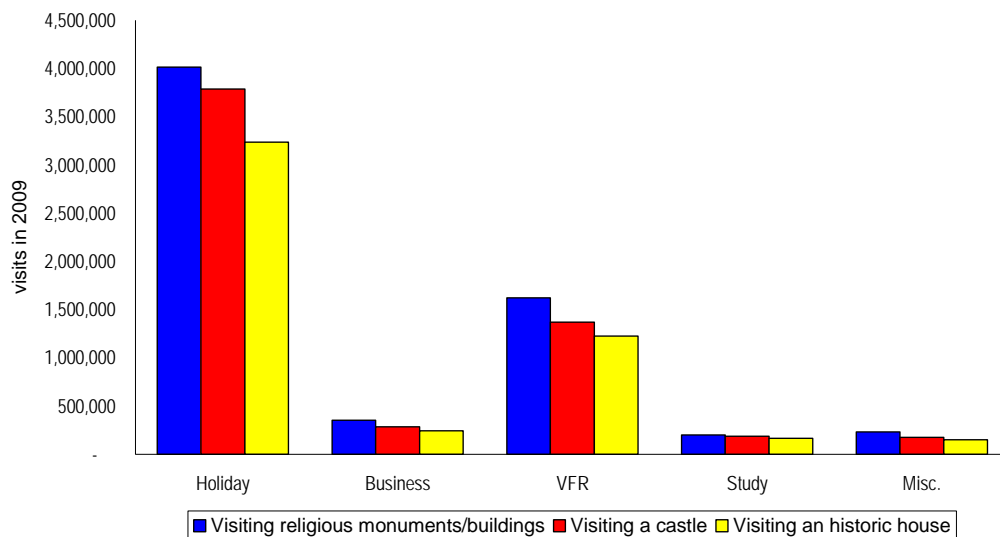
It is evident from the following chart that enjoying our built heritage is an activity that is more popular during the summer months than in the winter, with this seasonality being more acute for visits to castles than for visits to religious monuments and buildings. With the exception of during July to September, visiting religious monuments and buildings is the built heritage activity undertaken by the largest number of inbound visitors, but during the peak summer months visits to castles slightly outnumber other built heritage activities.

Seasonality

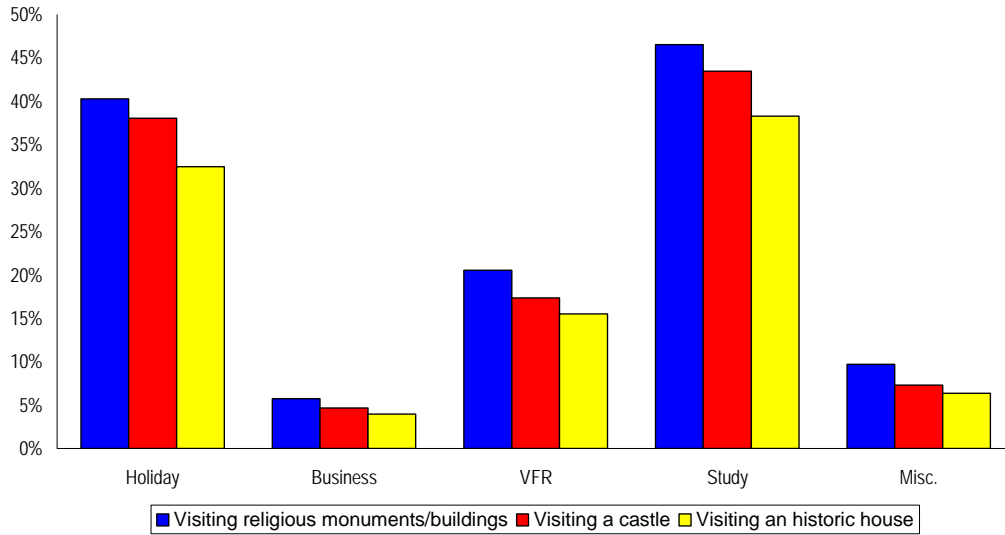


Why the visitor has travelled to Britain plays a strong role in determining what they do during their trip. We can see that visitors who are here on holiday make up the bulk of visits to built heritage sites, though with a sizeable number of visits by those here to visit either friends or relatives. If we switch the way in which the data is shown to be the proportion of inbound visitors with each journey purpose who visited one of the three types of built heritage covered here, we discover that those stating their journey purpose to be 'study' were the most likely to include religious buildings, castles and historic houses as a feature of their trip.

Journey purpose



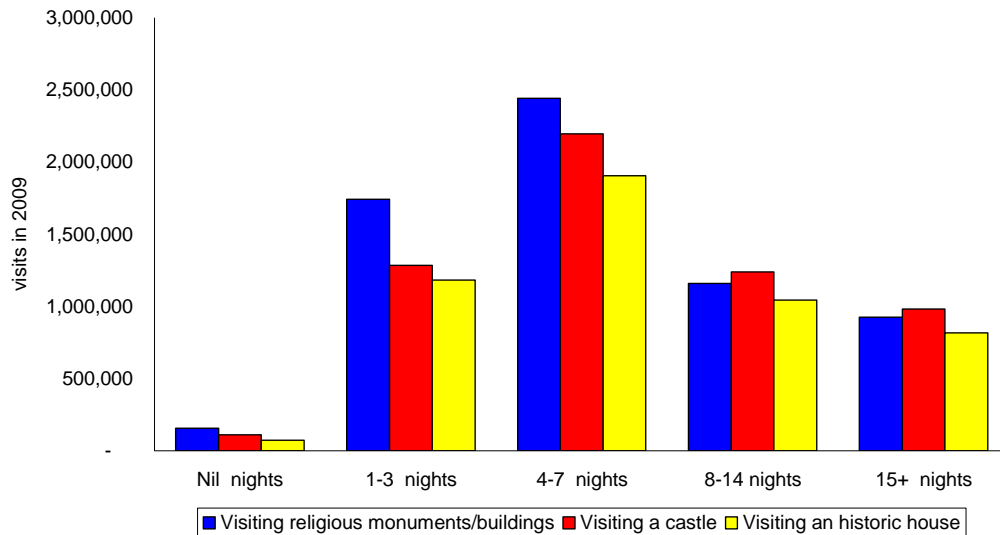
Proportion undertaking activity by journey purpose



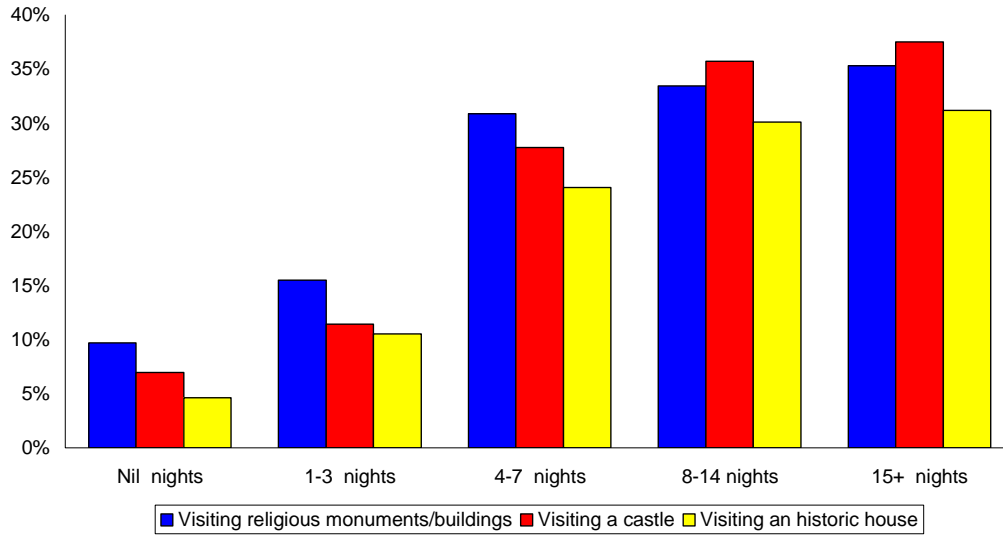
When considering duration of stay we discover that once again in volume terms it is visitors who are in Britain for between 4 and 7 nights that are most important, but in terms of likelihood to visit built heritage the second chart tells us that the longer the duration of stay, the greater is the chance that built heritage will be a feature of the trip. Indeed, for visits that last for 15+ nights 35% visit a religious monument or building, 38% a castle and 31% an historic house.

Note that for stays of up to 7 nights visiting religious monuments or buildings is the type of heritage site that is most visited, but for stays of 8 nights or more visits to castles nudge into the lead.

Duration of stay



Proportion undertaking activity by duration of stay

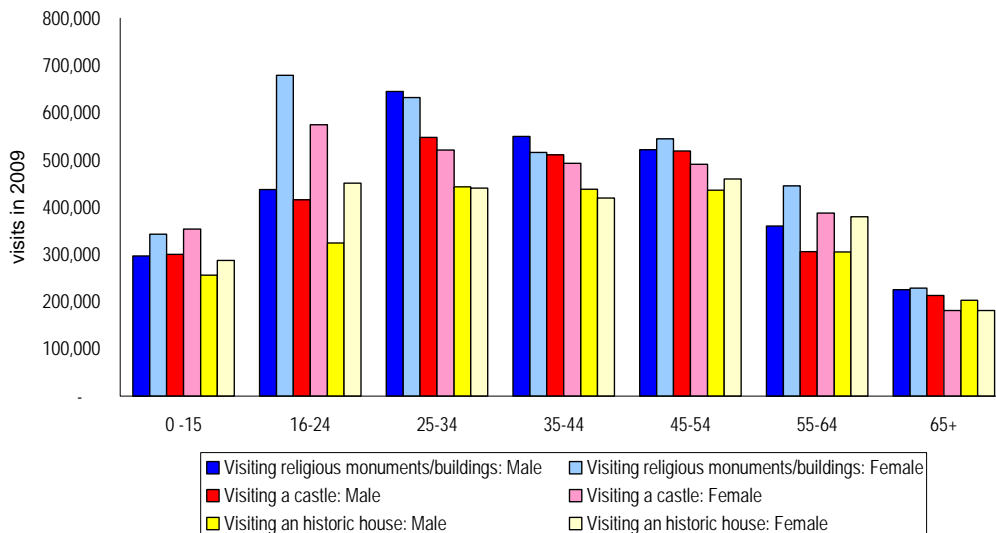


Visitor characteristics

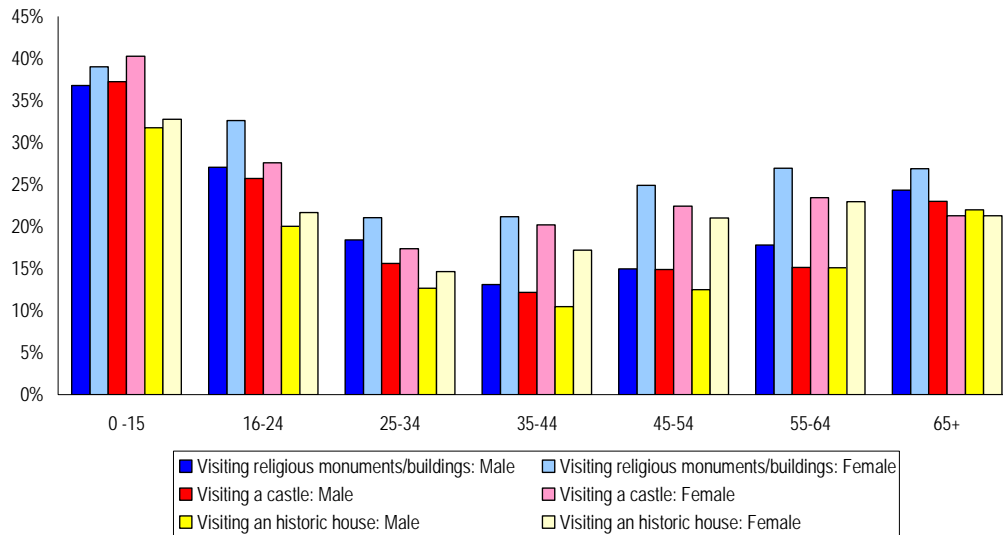
As highlighted earlier, we need to remember that visitor characteristics are influenced by the nature of a visit, in particular journey purpose. As such it is important to recognise that the age and gender profile of visitors coming to Britain for a holiday is different to that for visitors who are here on business, and this was illustrated in the chart on page 4.

As we can see, visits to built heritage sites is a popular pastime for all age groups and both sexes, but in terms of propensity to visit such locations the second chart shows that this is highest for the 0-15 age group. For those aged 35-64 there is a much higher likelihood for female visitors than males to experience heritage sites, but again this will be largely explained by the high propensity of male business visitors across these age groups.

Age and gender



Proportion undertaking activity by age and gender



Value

Taking the same approach as was the case in the article covering museums and art galleries, if we look at the proportion of all culture and heritage activities undertaken that are visits to the three forms of built heritage sites covered here, and then apply this ratio to the overall estimate of the ‘worth’ of Britain’s cultural and heritage assets to the inbound visitor economy described in our Culture and Heritage Topic Profile, it is possible to say that between them, historic houses, castles and religious monuments and buildings help to secure £1.4 billion worth of inbound visitor spending annually.

Topic Profile

To discover much more about the resonance of Britain’s cultural and heritage offering take a look at our [Topic Profile](#) on the subject, which discusses built heritage, cultural heritage and contemporary culture in detail – highlighting which markets rate us highly for which type of activity and which types of visitors are the most likely to interact with cultural and heritage activities while visiting Britain.

In the highly competitive market for international tourism, Britain is fortunate to have world-class museums, art galleries and built heritage sites scattered across the entire country helping to entice millions of visitors from overseas to opt for Britain as their holiday destination rather than one of our competitors.

¹ Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here. Crown Copyright 2010. Source: ONS

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