

## The Culture Module

part of the South West Observatory  
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**The Culture Module** is part of the South West Observatory's research intelligence network. It is informed by the South West Cultural Agencies Network (including: Arts Council England, Creative England, English Heritage, Sport England) and by South West Local Authorities Cultural Partnership. For more information and other publications visit: <http://www.culture@swo.org.uk> or contact Jules Channer at [culture@swo.org.uk](mailto:culture@swo.org.uk)

# Cultural Tourism in South West England

## BRIEFING PAPER

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The purpose of this paper is to provide the reader with an introduction to the concepts of 'cultural tourism' and 'cultural heritage' and present an overview of the state of cultural tourism. The focus of the paper is on South West England but briefly extends to the UK and Europe. Given the many different ways in which 'cultural tourism' is understood by academics, policy-makers and those working in the tourist industry, the paper is more of an overview than a comprehensive discussion of the subject, and the reader is sign-posted to further reading material.

### 1. Definitions

**Cultural Tourism:** is generally understood to be a genre of special interest tourism, in which the visitor is searching for, and participating in, new and deep cultural experiences, whether aesthetic, intellectual, emotional, or psychological (Stebbins, 1996). It therefore includes visits to heritage sites and cultural events and, more broadly, any experience that brings one culture in contact with another for the specific purpose of that contact in a touring situation. In spite of its wider range, the term is frequently used synonymously with 'cultural heritage tourism'.

**Cultural Heritage Tourism:** involves travelling in order to experience the places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural and natural resources (definition by the National Trust). Culture and heritage related tourism is often associated with 'screen tourism', in which the visitor experiences a specific location and/or locality used in a film or television programme. For example: the City of Bath and Jane Austen

novels and screen adaptations; Dorset towns and countryside and Thomas Hardy novels and screen adaptations; Gloucester cathedral and Harry Potter novels and screen adaptations.

According to the World Tourism Organisation, 'cultural tourism' should be recognised as one of the largest and fastest growing segments in the global tourism marketplace. About 20% of holidays in Western Europe can be regarded as cultural holidays (European Travel Commission, 2005). A 1997 survey showed that 33% of visits to the UK were motivated by culture or heritage. But even when culture is not the primary motivator for travel, many tourists still regard visits to cultural attractions as an important part of their holiday and culture is the single most important motivation for city trips.

According to a recent VisitBritain survey (2011a), the most frequently mentioned perception of Britain as a tourist destination is that it has a rich and interesting history (59%). Britain is seen as a world-class destination in terms of its built heritage, ranked 4<sup>th</sup> out of 50 nations in the 2009 Nation Brands Index, and its cultural heritage, ranked 7<sup>th</sup> out of 50 nations.

VisitBritain (2005) states that 'cultural tourism' encompasses visits to:

- Visual and performing arts
- Museums
- Galleries
- Heritage attractions
- Artists' open studios
- Art fairs
- Auctions
- Public art
- Architecture
- Festivals
- Films
- and other cultural events.

In terms of Standard Industrial Classifications codes (SIC)<sup>i</sup>, the Office for National Statistics (ONS, 2011c) is proposing that 'cultural tourism' activities should also include botanical and zoological

gardens and nature reserves activities. If accepted by European statisticians, the size and scope of the tourist industry will increase.

## **2. Characteristics of cultural tourists**

According to research studies (McKercher and Du Cros, 2002; Tien, 2008) cultural tourists are more likely to

- be more educated than other tourists
- have higher incomes than EU citizens on average (in part due to the higher incomes of US and other non-European visitors)
- be from geographically distant source markets
- be first-time visitors
- use travel information sources (especially family and friends, internet and guide books)
- stay more nights at the destination
- recall places and communities they visited
- engage in other travel and hospitality activities
- spend more money than non-cultural tourists.

Age:

- Cultural tourists are thought to be relatively older tourists, as levels of interest in culture are assumed to increase with age (European Travel Commission, 2005). However, numerous surveys have shown that young people make up a large proportion of visitors to cities and therefore also tend to visit cultural attractions in those cities relatively frequently.
- Heritage attractions generally attract an older audience whilst 'popular' cultural attractions tend to have a younger audience profile.
- The proportion of older people visiting cultural attractions has been showing an upwards trend which is consistent with the ageing population of Europe.

Employment:

- Employees make up the largest group of cultural visitors (44-48%) with a large proportion of employees in professional or managerial functions (European Travel Commission, 2005).

- A high proportion of cultural visitors have an occupation that is connected with culture.
- Retired people and students each account for about 15% of cultural visitors (that is, economically inactive).
- The most frequent travel group for culture city trips is a couple without children, reflecting the DINKIES (double income, no kids) domination of the market. Groups with children only account for about 20% of total visits.

Motivation:

- The most important reasons for visiting cultural attractions for all visitors tend to be learning about history and culture and enjoying the atmosphere of a place (European Travel Commission, 2005).
- There are relatively few differences between visitor groups but older visitors tend to be more motivated to learn about local history and culture than younger visitors. Those in the 30-49 age group are more motivated by entertainment.
- Visitors with higher incomes tend to be significantly more likely to state history or culture as their motivation for holidays than those on low or medium incomes.
- Cultural and historical motivations tend to increase with age.

### **3. Cultural Attractions in South West England**

In 2011, the Association of Leading Visitor Attractions (2012) found the 10 most visited attractions among its members in the South West were:

1. Roman Baths and Pump Room (1,130,857, up 7% since 2010);
2. Stonehenge (1,099,656, up 9%);
3. Eden Project (1,001,774, up 0.1%);
4. Stourhead (397,035, up 9.76%);
5. St Michael's Mount (276,639, up 4.76%);
6. Kingston Lacy (234,124, up 15.06%);
7. Lanhydrock (221,372, up 5.23%);
8. Corfe Castle (216,652, up 14.24%);
9. Tate St Ives (209,265, up 1%);
10. Tyntesfield (206,889, up 67.60%).

According to VisitEngland (2010) the major cultural tourist attractions in the South West were:

1. Stonehenge (9<sup>th</sup> most popular paid admission attraction in England and the 3<sup>rd</sup> most visited historic property)
2. Eden Project (10<sup>th</sup> most popular paid admission attraction in England)
3. Roman Baths (12<sup>th</sup> most popular paid admission attraction in England)
4. Moors Valley Country Park
5. Bristol Zoo Gardens
6. City Sightseeing Tour (available in Bath, Bournemouth and Bristol)
7. Paignton Zoo Environmental Park
8. Stourhead House and Garden
9. Bath Abbey (4<sup>th</sup> most popular place of worship in England)
10. Buckfast Abbey
11. Gloucester Cathedral
12. St Michael's Mount
13. National Marine Aquarium
14. New Brewery Arts
15. Salisbury Cathedral
16. Barbara Hepworth Museum and Sculpture Garden
17. West Somerset Railway
18. Lanhydrock House and Garden

However, there are no South West attractions among the top 20 free cultural attractions in England (that is, subsidised by local authorities or DCMS) (VisitEngland, 2010). Newcomen Engine House in the South West is the 3<sup>rd</sup> most popular heritage centre in England. Purbeck Information and Heritage Centre is the 10<sup>th</sup> most popular.

Cultural events tend to be much less important than fixed cultural attractions in city visits, presumably because of temporal and information-related problems (European Travel Commission, 2005). However, it is arguable that a popular cultural events such as Glastonbury Music Festival is important because of its significant (albeit time-specific) contribution to the local economy, and high international profile for attracting festival-goers back to the West Country.

#### **4. The Visitor Economy in South West England**

Looking at the visitor economy more generally, the following points summarise that in the SW:

- Of 29.8 million inbound visitors to the UK who spent £16.9 billion in 2010, 2.1 million visited the South West and generated £902 million in spend (VisitEngland, 2011).
- For all visitors in 2009/10, the top three most visited authorities in the South West were Bristol, Restormel and North Cornwall, and for international visitors alone, Cornwall, Devon, Dorset and Somerset ranked in the UK top 20 NUTS2 areas (Culture Module, 2012 not yet published).
- Whilst London and the South East attract the largest amount of tourist spend (40%, £113.7 billion in 2008) in the UK, the money spent makes more of a difference for the economy in Cornwall and the Scilly Isles (£2,034 million in 2008, with £134 million spent on cultural, sport and recreational services) (ONS, 2011b).
- The South West area with the highest estimated tourist expenditure in 2008 was the area comprising Gloucestershire, Wiltshire, Bristol and Bath with £3,934 million, £185 million of which were spent on cultural, sport and recreational services (ONS, 2011b).
- In 2010 overseas visitors to the South West spent £910 million during 2,138 staying visits. The most money was spent in Devon (£168m), followed by Somerset (£148m) and Dorset (£143m). Overseas visitors spent the least money in Gloucestershire (£99m) and Wiltshire (£103m), which also had the fewest staying visits (in other words, coachloads of overseas visitors don't stop for long!). The largest numbers of staying visits by overseas visitors (all types including business related) were recorded in Somerset, Devon and Bristol (Visit Britain, 2011c).
- Domestic holiday market, or 'staycations', is a regional strength, attracting 1-in-5 domestic overnight trips in England and 25% of all 'pure' holiday trips (VisitEngland, 2011).
- The South West received the highest expenditure of all UK regions for domestic overnight stays in 2008 with 18% of the UK total (ONS, 2011b).
- Cornwall and Devon are among the local authorities with the highest domestic overnight visitor spend (ONS, 2011b).
- Compared to all UK domestic tourists (that is, UK residents), visitors to the SW have a higher proportion of 65+ year olds (16%) and a lower proportion of 16-24 year olds (10%) (South West Tourism, 2010). These trends may, however, be affected by recent economic recession and potentially fewer holidays being taken by UK residents.
- Compared to all UK domestic tourist trips, trips to the South West have higher proportions in April, June, July, August and September – in other words, the traditional summer holiday months (South West Tourism, 2010).

- Compared to all UK domestic tourist trips, trips to the South West are considerably more likely to be trips to the seaside and less likely to be visits to large towns and cities (South West Tourism, 2010).
- Volume and value trends in the UK and South West are predicted to fall in spite of a small recovery in 2009 (VisitEngland, 2011). Factors affecting downward trends include global and national economic recession, higher oil prices, higher living costs and uncertainty over employment prospects.

## 5. Case studies relevant to ‘cultural tourism’

### THE EDEN PROJECT

With 1,001,774 visitors in 2011, the Eden Project near St Austell is one of the most popular cultural attraction in the South West and the 10<sup>th</sup> most popular paid admission attraction in England (VisitEngland, 2010). The Eden Project first opened as an educational charity and social enterprise in 2001 and includes the world’s largest greenhouse. It hosts a wide range of cultural events, such as art and photography exhibitions and concerts, which are often placed in an educational context. Since 2005, The Eden Project has had its own education facility, The Core, which comprises classrooms and exhibition spaces. The greenhouse complex successfully integrates charity projects, architecture, education, entertainment and culture, making it appeal to a wide audience.

### THE ROMAN BATHS

The Roman Baths in Bath saw a 7% increase in visitor number between 2010 and 2011 reaching 1,130,857 visitors. The 3<sup>rd</sup> most popular paid admission cultural attraction in the SW and the 12<sup>th</sup> most popular in England, the Roman Baths and Pump Rooms are a multi-functional venue that host a large number of heritage-related events, talks and tours throughout the year.

## 6. Useful organisations and contact details for South West England

- **Bath: Future Bath Plus**

Destination marketing organisation for Bath cooperating with more than 400 members from the tourism industry.

Andrew Cooper

Bath City Centre Manager

Abbey Chambers ☐

Abbey Church Yard□  
Bath□BA1 1LY  
Tel: 01225 396 458□  
Fax: 01225 477 221  
Email: [andrew.cooper@futurebathplus.co.uk](mailto:andrew.cooper@futurebathplus.co.uk)  
<http://visitbath.co.uk/>

▪ **Bristol: Destination Bristol**

Destination management partnership for Bristol & South Gloucestershire, a joint venture between Bristol City Council and GWE Business West working with over 600 businesses and strategic partners.

Joanne Lord  
Destination Bristol  
53 Queen Square  
Bristol BS1 4LH  
Tel: 0117 9462207  
Email: [Joanne.lord@destinationbristol.co.uk](mailto:Joanne.lord@destinationbristol.co.uk)  
<http://visitbristol.co.uk/>

▪ **Cornwall: Cornwall Development Company**

Cornwall Council's economic development service, working with key economic development agencies to provide a range of services to local industry, including VisitCornwall and ILoveCornwall.

Pydar House  
Pydar Street  
Truro TR1 1EA  
Tel: 01872 322900□  
Fax: 01872 322895□  
Email: [enquiries@visitcornwall.com](mailto:enquiries@visitcornwall.com)  
<http://www.cornwalldevelopmentcompany.co.uk/>

▪ **Devon: Visit Devon**

Destination management organisation for Devon.

Lucombe House ☐  
County Hall ☐  
Topsham Road ☐  
Exeter EX2 4QD  
Tel: 01392 381880 ☐  
Email: [info@visitdevon.co.uk](mailto:info@visitdevon.co.uk)  
<http://www.visitdevon.co.uk/>

▪ **Dorset: Visit Dorset Tourism Partnership**

Partnership of local authority tourism officers for destination marketing for Christchurch, East Dorset, Purbeck, West Dorset and Weymouth

Online contact form: <http://www.visit-dorset.com/information/contact-us>  
<http://www.visit-dorset.com/>

**Local authority contacts for tourism:**

Christchurch Borough Council: Ann Simon

Tel: 01202 495127

Email: [a.simon@christchurch.gov.uk](mailto:a.simon@christchurch.gov.uk)

East Dorset District Council: Rachel Limb

Tel: 01202 639031

Email: [rlimb@eastdorsetdc.gov.uk](mailto:rlimb@eastdorsetdc.gov.uk)

Purbeck District Council: Holly Lagden and Loraine Morris

Tel: 01929 557258

Email: [tourism@purbeck-dc.gov.uk](mailto:tourism@purbeck-dc.gov.uk)

West Dorset District Council: Amanda Park and Cheryl Stapleton

Tel: 01305 252241

Email: [tourism@westdorset-dc.gov.uk](mailto:tourism@westdorset-dc.gov.uk)

Weymouth and Portland Borough Council: Simon King

Tel: 01305 838515

Email: [tourism@weymouth.gov.uk](mailto:tourism@weymouth.gov.uk)

▪ **Gloucestershire: GFirst**

Gloucestershire First promotes business in the Forest of Dean, Cotswold hills and major settlements of Gloucester, Cheltenham, Tewkesbury and Stroud. GFirst runs the official Cotswolds and Forest of Dean tourism websites.

6th Floor, Llanthony Warehouse

The Docks

Gloucester GL1 2EH UK

Tel. 01452 328300

Email: [info@glosfirst.co.uk](mailto:info@glosfirst.co.uk)

<http://www.gfirst.co.uk/>

<http://www.cotswolds.com/>

<http://www.visitforestofdean.co.uk/>

▪ **Somerset: Visit Somerset/Somerset Tourism Association**

Official tourism website for Somerset.

<http://www.visitsomerset.co.uk/>

**Somerset County Council – The Economy Group**

Tel: 01823 355685

Email: [somerseteconomicdevelopment@somerset.gov.uk](mailto:somerseteconomicdevelopment@somerset.gov.uk)

▪ **South: Creative England**

Screen agency for England with film crew and location services for England including dedicated locations service for southern England.

St Bartholomews Court

Lewins Mead

Bristol BS1 5BT

Tel. 0117 970 9977

Email: [Fiona.francombe@creativeengland.co.uk](mailto:Fiona.francombe@creativeengland.co.uk)

▪ **South West: South West Tourism Alliance**

Industry-led consortium managing projects to support the SW tourism industry.

Tel. 0117 230 1262

Email: [info@swtourismalliance.org.uk](mailto:info@swtourismalliance.org.uk)

<http://www.swtourismalliance.org.uk/>

- **Wiltshire: Visit Wiltshire**

Official Wiltshire tourism partnership.

Pennyfarthing House

18 Pennyfarthing Street

Salisbury SP1 1HJ

Tel: 0845 6027323

Email: [info@visitwiltshire.co.uk](mailto:info@visitwiltshire.co.uk)

<http://www.visitwiltshire.co.uk/>

## 7. Future trends

### SOUTH WEST ENGLAND

There are projected to be a significant increase of visitor numbers (overseas and domestic) associated with the London 2012 Olympic and Paralympic Games during summer 2012 and notably to Weymouth and Portland in Dorset and to Cornwall for the start of the Olympic Torch Relay (May 19, 2012). However, inbound visitor numbers are predicted to fall over the next 2-3 years because of a fragile global economy and rising fuel costs (VisitEngland, 2011).

The region's well established position vis-a-vis domestic holidays (see above) suggests an opportunity for future expansion, While individual 'staycations' and 'daycations' by UK residents may not generate significant higher values per holiday, the annual volume of these domestic visitors could be improved as well as the number of 'staycations' taken per person each year could be increased. These trends are dependent on (a) the region's capacity to attract UK residents and to target specific groups and (b) a willingness of UK residents to travel to the South West more regularly.

In terms of 'cultural tourism' and 'cultural heritage', the South West region offers a unique environment in which to develop these genres. With some of the highest counts in the UK of historic monuments, listed buildings, World Heritage Sites, historic gardens and maritime wrecks, protected coastlines and landscapes, museums and galleries, both tourist and cultural development bodies have an extraordinary cultural infrastructure to build on. Furthermore, tourist market segmentation trends (see above) indicate a more targeted and collaborative approach is needed in cultural tourism campaigns and capital projects.

## UNITED KINGDOM

In 2012, an estimated 30.7 million overseas visitors are expected to visit the UK, spending £17.6 billion. Although this would mean no increase compared to 2011 in spite of the London 2012 Olympic and Paralympic Games, it would mean maintaining current visitor levels despite the negative global economic uncertainties (VisitBritain, 2011b). But generally, tourism volume and value trends in the UK and South West are predicted to fall over the next few years (VisitEngland, 2011).

Expenditure of families in the UK on 'recreation and culture' increased by 20p per week between 2009 and 2010 to a weekly average of £58.10. 'Recreation and culture' was the 3<sup>rd</sup> highest expenditure category after transport and housing, fuel and power (ONS, 2011a).

## EUROPE

Due to the current economic crisis in Europe, Tourism Economics forecast visits to all European countries are likely to decline just over 1% in 2012 and with just moderate growth of 0.8% expected for 2013. Countries in the EU are expected to experience the brunt of the contraction, especially Western and Southern Europe (European Travel Commission, 2012).

The European Commission (EC) is currently proposing to develop a Virtual Tourism Observatory (VTO) with the aim of providing an effective knowledge base for tourism at the European level to support evidence-based policy making (European Commission, 2012).

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<sup>i</sup> Standard Industrial Classification (SIC) codes are used by analysts to measure the size and scope of an industrial sector including the number of businesses and people employed.