

A five year strategy for
Museums & Galleries
In England's Northwest



Celebrating our
cultural heritage:
investing in
a future for all

DOCUMENT 4: SURVEY OF REGIONAL MUSEUMS - MARKET CONTEXT

National Context

Museums in the UK

Although there is no generally agreed figure for the total number of museums in the UK, MLA's registration scheme recognises 1,860 institutions which have met or are working towards basic standards in museum management, care of collections and services to the public. Of these, 1432 are located in England (Source: Resource, 2001). The museum community is one of huge variety, ranging from the biggest national museums to one-room institutions. They may be funded by central or local government, by universities, or through admission charges and commercial operations. They cater for a diverse range of users, from domestic and overseas tourists to local community and scholarly audiences. Museums are among the UK's most popular attractions, with over 77 million visits each year – more than to any other category of visitor attraction.

Most museums in the regions are small and have very localised audiences. Over 50% attract fewer than 10,000 visits per annum and 66% attract fewer than 20,000 visits. Nevertheless, such museums often tell the story of the locality through the experiences of its people and, as such, they help to generate a sense of civic pride and citizenship. In contrast, there are a number of larger regional museums, mostly based in the major cities, with significant spending power and audience reach. Many of their visitors come from beyond the boundaries of their host local authorities and their collections often reflect region-wide collecting over many decades.

The UK Museum Market

Visits to museums/art galleries in the UK increased by 7% between 2001 and 2002, and by almost 10% in the two years from 2000 to 2002. This can partially be attributed to the introduction of free admission to National Museums in 2001.

The most recent national survey of visitors to museums and galleries was "Visitors to Museums & Galleries in the UK", MORI, 2001. Key market findings on museum visiting are as follows:

- Museums and galleries remain amongst the most popular attractions in the UK, with over 77 million visits per annum - just under three in ten people having visited at least once during the year prior to the research being carried out.
- Older adults (aged 65+) account for the largest proportion of visits to museums and galleries (16%), with people aged 45-64 accounting for a further 14%-15%. Despite apparent decreases in the family market, visits by adults with children aged between 5 and 10 still represent a significant proportion of all visits to museums and galleries (13%).
- Research among schoolchildren suggests that they have a relatively positive attitude towards museums and galleries. One third of children visiting a museum or gallery on a school trip choose to make a return visit.
- Museums and galleries are still very competitive when compared with other types of attractions – remaining top in the range of attractions alongside well-known parks and gardens.
- The main reason given for not visiting museums is there was "nothing I particularly wanted to see" (41% of respondents).

The survey report "Arts in England: attendance, participation and attitudes in 2001" found that of the respondents who had visited a museum in the previous year, 25% had visited once, 28% had visited twice and 28% had visited between three and five times. The remaining 20% (or 7% of all respondents) had visited six or more times. The number of visits made increases with age. 25% of museum visitors aged 75 and over visited at least six times in the twelve months before the interview, compared to just 13% of those aged 25-34.

Life Stage Profiles:

Students – one of the core groups of visitors – 37% have visited in the past 12 months although they tend to be infrequent visitors with only around one third having visited three or more times in the past 12 months.

Families – with children aged between 5 and 10 are more likely to visit than those with children under 4 or over 10.

Middle Aged 35-44 without children – tend to be frequent visitors, with more than one third having visited at least 5 times in the past 12 months.

Middle aged 45-54 without children – also frequent visitors, normally with their partner.

Older adults 55+ without children – still account for the largest proportion of all museum and gallery visits. Although they tend to be frequent visitors (around 3 trips per year), on average they visit less often than middle aged people.

Socio-Economic Class:

Social class is one of the main indicators as to whether people do or do not visit museums and galleries – with higher social classes far more likely to visit. ABC1s account for 70% of museum and gallery visitors but only around half of the UK population (49%).

Based on research by MORI, some 21% of visits to the region's museums and galleries are made by those of socio-economic groups C2DE. The MLA has the aspiration that the profile of museum visitors should progressively reflect that of regional populations.

Formal Education Market

For the formal education sector, whilst museum and gallery visiting remains popular, the research for the EPDP confirms the main challenges in taking children out of school are, as expected, the cost of transport, Health and Safety considerations and timetabling pressures at Key Stage 3. These matters are arguably beyond the jurisdiction of individual museums and can only be addressed by multi-agency action and cultural change at a national level.

Furthermore, schools use of distance learning utilising museums on-line resources remains limited, not least because computing resources in many are inadequate and teachers' knowledge and skill in accessing and using web-based resources is patchy.

Audience Needs And Wants

A lot is known about museums' perceptions of their needs and a fair amount is known about the characteristics of the communities in which museums are set. A considerable amount is known about national, regional and sub-regional trends in visiting patterns, tourist and day visitor volumes and so on. Yet what do museums' consumers – the users and visitors – want and what are their needs?

A MORI poll was commissioned by HLF and conducted in June 2000, which sets out the needs of the sector as defined by its consumers. MORI's survey reports the steps museums and galleries need to take in order to increase visits, and it concluded that:

- The cost of visiting museums should be reduced
- An overall improvement in museum facilities is required
- That investment in engaging displays of relevance to audiences is essential
- Educational programmes within museums need developing
- People now expect museums to be relaxing, entertaining, social spaces as well as educational centres
- People view museums in the context of a broad spectrum of leisure options, and museums have to modernise to compete successfully in this more demanding market place.

Demographic Trends

Forecasts of future visitor characteristics and trends (by the former ETC, ONS et al) are generally favourable for the heritage sector, with a forecast increase in older age groups and higher socio-economic groups:

- Growth in ABC1 socio-economic groups, decline in lower socio-economic groups. This will place pressure on the achievement of targeted outcomes as this proportion of the population declines and becomes more concentrated.

- Significant growth in proportion of population over 45, whilst the proportion of under 25's will drop. The over 45's have a very different outlook to previous generations and are very discerning consumers demanding quality and meaningful experiences.
- The proportion over 55's will grow significantly, whilst the proportion of 5-9's will drop. There will be more opportunities for informal learning, but increasing needs for physically accessible experiences for the less active.
- Increase in disposable income to spend on leisure. However this is accompanied by higher stress levels and pressures on time. This increase in cash rich, time poor will drive the quality of experience and value for time.
- Visiting historic buildings and gardens is more popular among older age groups, while visiting theme parks, country parks and farms is more popular among younger adults. Museums and galleries appeal to a wide age range, although visiting levels are highest amongst the 35-54 and 15-24 age groups.

In terms of social status, consumers from the more affluent ABC1 groups show well above average propensity to visit attractions such as historic buildings, museums and galleries and gardens. In addition it should be noted that:

- 40% of households comprises at least one adult and child – thus children remain a powerful motivator of visits to attractions
- Just 24% of households comprise a 'traditional' family – thus marketing to family audiences needs to reflect their diversity
- 21% of all families have a lone parent, one in 10 of these are fathers – households with a lone parent have different kinds of needs and widely varying spending power
- A broad definition of the family includes single parents, extended families, foster parents etc. Many grandparents take an active role in child care and providing informal learning for children – they are increasingly visit decision makers

Market And Lifestyle Trends

The main drivers underlying the continued growth in national tourism figures have been: visits to friends and relatives; business tourism; short breaks and day trips. Traditional UK long holidays have been in decline as people have gone abroad instead.

Winners from tourism trends include: cities; destinations appealing to "the middle classes; short breaks, quality independent operators; destination retail and the night economy.

Current market trends that are likely to continue into the future include: short breaks; visits to friends (especially by the young); day visits, empty nester visitors and activity and special interest breaks.

Research by the former English Tourist Board (now Visit Britain) has highlighted that visitors to attractions – including museums – are increasingly looking for "perfect moments" – times and places where in an increasingly busy and stressful world, they could relax and enjoy themselves, with the emphasis on quality, distinctiveness and style.

The UK Day Visitor Market

Spending by UK residents on day trips within the UK amounted to £34.2 billion in 2002. Approximately half the value of tourism in the UK comes from day trips.

The following points are from the last comprehensive day visits survey (1998 UK Day Visits Survey) undertaken by the National Centre for Social Research on behalf of a consortium of partners including the DCMS and Scottish and Wales Tourist Boards:

- Day trip visits have increased by 48% over the last ten years, rising to a total of £656 billion spent by tourists on these day trips. A tourist day trip is defined as a non-regular trip from home, lasting three hours or more.
- English towns and countryside destinations have slowly increased over the last 10 years, but cities and towns have had the largest visitor increases.
- Average expenditure per tourism trip to a town/urban destination was £28.30; with key areas of spending on food and drink (30%), shopping (29% - including 17% of this shopping

spend on clothes), travel and fuel related costs (32%). Admission charges, e.g. for attractions, amounted to 9% of total expenditure.

- 72% of people travelled to towns for day trips
- Eating out (22%), Shopping (16%), Visiting Friends and Relatives (15%) and Entertainment (12%) accounted for two thirds of all day trips.
- Tourism day trips, on average lasted almost 5.5 hours and the average distance travelled for all types of day trips was 37 miles.
- The car was the main mode of transport for the majority of trips – 71% compared to 12% for bus/train.
- On average, 3.5 hours were spent at the main attraction.
- 90% of tourism trips were carried out in the company of other people. Almost two thirds (64%) of tourism trips were made by parties comprising two or more adults, while parties of adults and children accounted for a further 22%.

The North West: A Regional Population And Economic Profile

Slightly fewer than 6.9 million people live in the North West (14% of the English population and over 11% of the total UK population) making it the third most populous English region behind London and the South East. The region has a bigger population than Scotland, Wales and Northern Ireland. Projected demographic growth rates are for a 4% increase by 2011. The Manchester – Merseyside corridor has the largest population of any conurbation outside of London.

The region has a workforce of 3.2 million, with 300,000 in the tourist/heritage sectors. The North West is the UK's principal call centre location, is responsible for a quarter of the UK's chemical output, and a fifth of national pharmaceutical production. The region is one of the main locations for inward investment in the UK, having attracted over 1,600 overseas companies to date. Forty-nine of the top one hundred most deprived districts in England are in the North West, (DETR Indices of Deprivation 2000), – with three (Manchester, Knowsley and Liverpool) in the bottom 53. On the other hand, 16 districts are among the top third least deprived districts. This picture reflects a wide variety of industrial structures and performance across the region with an inevitable impact on employment.

The region's industrial base, its people and its landscape (both urban and rural) are diverse, as are its overall economic and social mix. Ethnic minority groups represent 4% of the total population, with particularly high proportions (42%) of Pakistani/Bangladeshi ethnic groups within that total. The region varies from highly developed urban centres like Manchester and Liverpool, to sparsely populated rural areas like Cumbria and North Lancashire. 80% of the North West land area is rural, but holds only 20% of the population. The highest population density is in Blackpool, with 4,300 people per km².

The region consists of the counties of Cumbria, Lancashire, Cheshire, Merseyside, Greater Manchester and the unitary authorities of Halton, Warrington, Blackburn with Darwen and Blackpool. Within the North West there are 43 Local Authorities (24 borough authorities, 15 Metropolitan areas and 4 unitary authorities).

The North West is the second biggest region outside of the South East, covering an area of 14,165 square kilometres (11% of the total land area of England). The region is bounded from the north by the Scottish borders, to the east by the Pennine hills, to the west by the Irish Sea and to the south by North West Wales and the North East Midlands.

With a regional GDP per head of slightly under £10,000, the North West economy equates to over £67 billion - larger than that of five EU member states. However, the scale of the regional economy masks the ongoing challenges of de-industrialisation of the country's first industrialised region, and the major structural changes occurring in the rural economy. These changes have affected the overall economic performance of the region and the North West is 9th out of 12 regions in terms of GDP per capita.

The region annually produces over 44,000 graduates from its universities and Higher Education institutions, including over 10,000 science and technology graduates and over 6,000 in business and IT. Despite these assets the region lacks a lifelong learning culture with less than one-third of adults undertaking any learning activity in the last year. This is coupled to underperformance at key stage 3 and a legacy of the highest proportion of adults with literacy and numeracy difficulties in the English regions.

The pivotal position of the North West is highlighted by its location bordering four other England regions – the North East, Yorkshire and the Humber, the East Midlands and the West Midlands – and the other three constituent countries of the UK – Scotland, Wales and, across the Irish Sea, Northern Ireland. The region has a close cultural affinity with its closest European neighbour, the Republic of Ireland.

The Government's agenda for the regions is delivered through the activities of a variety of agencies, principal amongst which are those noted below. Each has some degree of influence or contact with the museums and galleries sector in the region

North West Marketing Context

Regional Issues

Whilst headline tourism figures in the UK have shown rapid growth, the North West regional picture (as in other regions) is one of contrasts. Attractions with significant dependence on overseas tourism have faced difficulties as a result of terrorism concerns, SARS, the Iraq war and the value of the £. Rural areas – such as Cumbria – fared badly as a consequence of the Foot and Mouth Epidemic and whilst the Lake District as a whole has recovered since, this has benefited outdoor pursuits at the expense of heritage tourism.

City destinations such as Manchester and Liverpool have shown strong growth, helped by new attraction development and buoyant business markets, but peripheral areas such as West Cumbria and East Lancashire struggle to make headway.

Smaller attractions in traditional urban towns, often non-tourist areas without a diversified destination offer, have suffered at the expense of city tourism. With limited marketing budgets and often locations in 'gritty' areas, they struggle to attract market share. Museums such as Catalyst – Science Discovery Centre in Widnes are illustrative of this issue.

An increasingly overloaded transport infrastructure, combined with pressure on visitors' discretionary time and thus their propensity to make stressful journeys, makes some locations less attractive destinations to car and rail travellers. This particularly applies to towns affected by M60 and M6 congestion and attractions remote from the regional rail network.

The region's strong out of town destination retail offer – including The Trafford Centre, Gemini at Warrington and Cheshire Oaks – are strong counter pulls for the leisure time of mobile, more affluent consumers, especially at weekends.

Regional Perceptions

Research by MORI on perceptions of England's Northwest highlights the importance of the region's people and environment as perceptual strengths noted by residents whilst those from beyond the North West mention and places or areas.

North westerners strongly identify both with their region and their own neighbourhood. Amongst residents, Greater Manchester and Merseyside are the most familiar counties, yet they are more likely to be poorly regarded. Cumbria and Cheshire are less well known but they are better regarded.

Outsiders have the more favourable perceptions of Cumbria and Cheshire and less favoured impressions of Greater Manchester and Merseyside. Blackburn and Oldham are most likely to be viewed in a negative light, view on Liverpool are mixed

There are 160 registered museums throughout Cumbria, Lancashire, Cheshire, Merseyside and Greater Manchester (Source: MLA North West). In 2001, 11% of visits to all attractions in the North West Tourist Board region were to museums and art galleries, while 9% of visits to all attractions in Cumbria were to museums and art galleries (Source: North West Tourist Board).

The Regional Day Visit Market

In 2002 an estimated 118.3 million tourist day trips were taken in the North West Tourist Board region. Total spend was £3,619m. Approximately 90% of visits to the North West are day trips. An average of between 15-20 tourism day trips per year are taken per head in the regional catchment – a high level of expressed demand.

Regional Attractions Visiting

Only a small proportion of day trips will include visiting attractions – the UK Day Visits Survey found that just 6% of day visitors gave visiting an attraction as their primary day out purpose. Also,

this population has a huge choice of alternative attractions available, not only within the North West region but also in neighbouring regions. Visits to visitor attractions in the North West rose by 5% between 2001 and 2002, following a decline of 3% between 2000 and 2001. Visits have therefore increased by 2% since 2000. The most visited attraction in the North West in 2002 was Blackpool Pleasure Beach, with 6.8 million visitors. The most visited museum/art gallery in the North West in 2002 was the Lowry in Salford, which received an estimated 810,200 (Source: Visits to Visitor Attractions 2002). Sightseeing in the UK 2002 reports the following information: The North West region accounts for 4% of attractions in England, yet received 9% of total visits.

- The average adult standard charge of attractions in the North West was £4.32, compared to an average of £3.96 across England. The average child standard charge in the North West was £2.39, which was higher than the average in England of £2.13.
- The average number of visits per site is 183,226, compared to 96,705 in England as a whole.
- 53% of attractions are in urban locations. Cumbria has the highest concentration of rural attractions in the UK.
- The North West is the only region in the UK where year round attractions experienced a proportionately smaller share of visits than their share of supply. Seasonal attractions in the North West performed more strongly than year round attractions.
- Attractions in the North West saw an increase in gross revenue of 9% in 2002 compared to 2001.
- 74% of attractions in the North West receive revenue from retail, while 52% receive revenue from catering.
- Attractions in the North West received an average revenue per visit of over £7.00, compared to an average of £5.46 across the whole of England

Cumbria – Regional Context

There are 32 registered Museums in Cumbria, many of them small, but together making up a remarkable resource and asset for the County. They cover a wide range of subjects and are spread widely across the county, with important museums away from the tourist sites, and relatively fewer in the Lake District.

The National Trust and English Heritage both operate heritage properties in the county. The Wordsworth Trust is the County's only designated museum. However, museums in Cumbria that are seen as nationally or regionally significant in different ways are Abbot Hall and Tullie House. Cumbria County Council and all the district authorities support museum operations through direct operation. Key local authority museums include: Keswick Museum, Helena Thompson, Dock Museum, Tullie House and Kendal Museum.

Cheshire – Regional Context

There are 21 registered Museums in Cheshire and Warrington. Many of these preserve and interpret Cheshire's social history and industrial heritage (e.g. Salt Museum, Silk Industry Museum). Direct provision of museums by local authorities is limited, but local authority financial support has been and remains vital to the survival of the independent museums sector. There are two regimental museums in Cheshire, as well as heritage properties operated by The National Trust and English Heritage.

There are many important heritage sites in private, public and voluntary sector ownership including country houses and gardens (e.g. Tatton Park, Little Moreton Hall), industrial archaeology sites (the Silk Industry Museums, Stretton Watermill) and waterways (Ellesmere Port Boat Museum).

Merseyside – Regional Context

There are 22 registered Museums in Merseyside. Nine of these are National Museums - Tate Liverpool, which holds one of the major collections of modern art in the North of England, and the eight museums that comprise National Museums Liverpool. Other registered collections are those at the University of Liverpool, Liverpool Cathedral and St Helens World of Glass. There are also a small number of local authority run museums.

Manchester

There are 43 registered museums and galleries in Greater Manchester making it one of the strongest arts and museum communities outside London. Key museums are Manchester Art

Gallery, Museum of Science and Industry, Manchester Museum, Whitworth Art Gallery and People's History Museum. The majority of museums in Greater Manchester are governed by one of the ten local authorities that comprise the sub-region.

Lancashire

There are 42 registered museums and galleries in Lancashire covering a wide range of subjects, including the social and industrial history of the county (particularly textiles). Many of these are governed by the County Council or one of the District Councils. Within Lancashire there is one National museum (The National Football Museum), several regimental museums, two University museums and one National Trust property (Rufford Old Hall).

Cumbria –Day visit market

According to STEAM 2000 there were a total of 19.4 million day visitors (over three hours duration and 20 mile minimum round trip) to Cumbria in 1999. Of these, 11.5 million were to the Lake District National Park. Eden, Barrow and Copeland received the lowest numbers of day visitors. The number of day visitors as a proportion of all visitors is generally high, illustrating the popularity of Cumbria for day visits from the North West and North East. (Source: The Economic Impact of Tourism in Cumbria – STEAM 2000).

The most popular paid visitor attraction in Cumbria in 2002 was Windermere Lake Cruises with 1,266,027 visits in 2002. The most popular paid museum attraction was Tullie House Museum and Art Gallery with 284,011 visitors in 2002. The most popular free admission visitor attraction in 2002 was Carlisle Cathedral, with 175,456 visitors. The most popular free admission registered museum attraction was the Dock Museum, which received approximately 100,000 visitors in 2002. (Source: Survey of Visits to Visitor Attractions – excludes attractions where operator did not authorise figures for publication).

Cheshire – Day visit market

In 1999 there were 16.9 million day visitors to Cheshire, spending £406 million, averaging £30 per head on town / city trips and £16 per head on countryside trips (Source: Economic Impact Model prepared in 2000 by NWTB based on 1999 data for Cheshire County Council).

Attraction attendance figures in Cheshire showed little overall growth during the 3 years to 2001, and in most cases declined. This has generally been the case for all types and sizes of attractions. There are some exceptions to this general trend. Tatton Park Gardens, Brookside Miniature Railway and Blakemere Craft Centre all had increasing visit figures of at least 15% between 1998 and 2001. (Source: Cheshire County Council Research and Intelligence Unit)

Merseyside – Day visit market

Day visitors are estimated to number 16.8 million generating spend of £368 million a year. (Source: Visitors to Merseyside 2000 and Cambridge Economic Impact Model, NWTB). The volume and value of tourism within Merseyside in 2000 varied from the least popular tourist destination, Knowsley, with 810,422 day visitors spending a total of £12.5million, to the most popular destination, Liverpool, which attracted 6,691,727 day visitors spending £152.5 million. The most popular attraction in Merseyside is the Albert Dock, attracting 4 million visitors a year.

Greater Manchester – Day visit market

The range and scale of appeal of city centre Manchester is a powerful day visitor magnet, with strong primary purposes of shopping, entertainment, cultural and sporting intent. In 2001 there were an estimated 15.97 million Manchester day visitors, with economic benefit to the City of over £202 million (source: STEAM Report 2001, Marketing Manchester).

Lancashire– Day visit market

The Annual Lancashire Tourism Monitor estimates there were 18.2 million day trips taken to Lancashire in 2000 (this excludes local resident trips for regular activities e.g. regular shopping, health visits etc.). 5.5 million of these trips were made to towns and cities with an average spend of £43.22 per head. For comparison, day trips to the countryside were twice as great but spend per head was very low at £8.50. In 2000, 36% of total tourism expenditure in Lancashire came from day visitors. The number of day visitors had increased by 4% from the previous year.

Tourism In The North West

In 2002 there were a total of over 20 million tourist trips made to the North West Region (including Cumbria) and a total spend of £3,551 million.

UK residents made 18.8 million trips to the North West, staying 52.3 million nights and spending £3,044 million.

Overseas visitors made 1.62 million trips, spending 10.5 million nights and spending £507 million. Two cities in the North West were amongst the top 20 cities visited by overseas tourists in the UK in 2002. Manchester received 590,000 overseas tourists in 2002 and Liverpool received 190,000. These figures exclude day visits (Source: International Passenger Survey, Office for National Statistics).

Key facts of tourism for the North West Tourist Board Region 2002:

- The main purpose of visit to the NW by UK residents is for holiday (59%) followed by VFR (25%). Amongst overseas visitors, 36% of visitors were on business, 33% were visiting friends or relatives and 20% were on holiday.
- UK residents spent an average of £160 per trip, while overseas residents spent an average of £341 per visit.
- The predominant age groups amongst UK visitors to the NW are 25-34 (21%) and 35-44 (25%). Classification groups show that 31% of visitors to the NW are the AB segment while C1 bands account for 30%.

The nature of tourism varies considerable from one part of the North West region to another. Tourism in the cities is dominated by VFR (visiting friends and relatives), business tourism and short leisure breaks. By contrast holiday tourism dominates in important destinations such as the Lake District and Blackpool.

Visitors from overseas are comparatively limited in numbers in some parts of the region, e.g. Lancashire, and are more likely to be visiting for business in Manchester than in other cities like Liverpool and Chester.

The Strategy for Tourism in England's Northwest was published in June 2003. This Strategy includes the Cumbria Tourist Board region and is delivered through nine programme areas covering product development, marketing, and sector development. Within each programme area there is an innovative range of projects designed to lead to a growth in tourism in the region.

The strategy has adopted the 'star brand' approach to marketing. Visitors are attracted to the region using 'attack' brands - the Lake District, Manchester, Liverpool and Chester, then dispersed to other parts of the region, using less well-known products and areas; the 'slipstream' brands. 'Slipstream' brands are locations that receive a different level of marketing, typically aimed at potential visitors already in or near the region. They are normally marketed in association with one or more 'attack' brands. In addition, investment is being made in a smaller number of 'development' brands that will play a bigger role over time in attracting people to the region. Initially, the primary 'development' brand is Blackpool. (Source: The Strategy for Tourism in England's North West).

Cumbria - Tourism

In 2002 UK residents made 4.3 million trips to Cumbria, staying 13 million nights and spending £728 million. Overseas visitors made 0.18 million trips, staying 1 million nights and spending £41 million (Source: UKTS/IPS). Total spend by visitors was £769 million.

Key facts of tourism for Cumbria 2002:

- The main purpose of visits to Cumbria UK residents is for holiday (79%) followed by VFR (12%). Amongst overseas visitors, 11% of visitors were on business, 39% were visiting friends or relatives and 50% were on holiday.
- UK residents spent an average of £169 per trip, while overseas residents spent an average of £227 per visit.

- The predominant age groups amongst UK visitors to Cumbria are 25-34 (23%) and 35-44 (22%). Classification groups show that 38% of visitors to Cumbria are the AB segment while C1 bands account for 30% of visitors.

Tourism in Cumbria is a vital industry with expenditure by visitors supporting over 47,000 jobs (25% of total jobs). In 1999 tourism in Cumbria accounted for 18% of GDP. 55% of the county's tourism revenue is generated within the Lake District National Park. The proportion of expenditure on accommodation varies significantly across the county, ranging from 7% in Barrow-in-Furness to 30% in South Lakeland. 64% of tourism revenue is generated during the period April to September (Source: The Economic Impact of Tourism in Cumbria - STEAM 2000).

Overseas visits to Cumbria represent less than 10 per cent of all visits. The proportion of domestic and overseas visits has remained fairly consistent over the past 20 years.

Brands

In 1999, The National Geographic Magazine identified the Lake District as one of the World's top 50 "must see" destinations. Research has shown that "The Lake District" is the most recognised tourism brand outside London. The Lake District is one of the key attack brands of the North West Tourism Strategy. Identified slipstream brands that are of particular relevance to museums in the North West are Beatrix Potter (Beatrix Potter Gallery, Hill Top), visitor attractions in Keswick and West Lakes and Kendal and South Lakes (e.g. Kendal Museum and Art Gallery, Keswick Museum and Abbot Hall) and other thematic brands e.g. Lakeland poets (Ruskin Museum, the Wordsworth Trust).

Cultural Strategy

Cumbria County Council published "A Cultural Strategy for Cumbria" in 2003. Its key objectives are:

Creating Opportunities

- To develop a partnership approach to optimising cultural assets
- To establish a framework of cultural opportunities in life-long learning
- To support creative and cultural industries

Investment & Regeneration

- To invest in the cultural infrastructure of Cumbria
- To maximise the level of external investment in Cumbria's cultural sector
- To encourage cultural activity by strategic planning of facility provision

Quality of Life & Access

- To advance social inclusion and community regeneration through cultural activity
- To promote cultural activity that contributes to health and well-being
- To support the voluntary sector to enhance its cultural contribution

Museums have a particularly important role to play in the strategy's aim of increasing community participation in cultural activities.

Cheshire Tourism

In 2002 UK residents made 2.6 million trips to Cheshire, staying 6.6 million nights and spending £329 million. Overseas residents made 0.23 million visitors to Cheshire, staying 1.6 million nights and spending £76 million (Source: UKTS/IPS)

An Economic Impact Model was prepared in 2000 by NWTB based on 1999 data for Cheshire County Council. The results should be treated as indicative of the scale and importance of visitor activity rather than absolute figures. This provides some headline figures for 1999.

- The overseas market made up 13% of overnight trips, 25% of nights and 36% of expenditure.
- Cheshire accounted for 17% of all tourism expenditure in the North West in 1999.
- The average length of stay for UK overnight visitors in 1999 was 3.0 nights for holidays, 1.9 nights for business and 2.1 nights at friends and relatives.

- The average spend per head per trip by staying visitors ranged from £156 for business, to £120 for holiday to £39 for friends and relatives.
- 51% of overnight visitors used commercial accommodation and 49% stayed in the homes of friends and relatives.
- 65% of the total expenditure is distributed to the retail and catering sectors.
- Tourism supported around 21,000 jobs. This amounts to at least 5% of the Cheshire workforce.

(Source: Cheshire Tourism Strategy).

Museums and heritage are prime attractors of visitors and are an essential element of the tourism industry in Cheshire.

Brands

Chester has been identified as the attack brand within Cheshire, with history and culture as key slipstream brands. Museums have a key role to play in the presentation of the history and culture of Cheshire. Within Cheshire as a whole, canals and waterways have been identified as a slipstream brand, which is particularly relevant to the Ellesmere Port Boat Museum.

Cultural Strategy

The Cultural Strategy for Cheshire and Warrington outlines six themes that have been developed to deliver the central aim of enhancing the economic, environmental, social and personal prosperity of Cheshire and Warrington through the support for and development of cultural and creative activity.

These are:

- Cultural Economy: sustaining and developing a cultural economy, and attracting and retaining talent and expertise
- Social economy: developing the role of culture in creating sustainable, vibrant and healthy communities
- Environment: promoting heritage and landscape as central to culture and ensuring cultural development in villages, towns, cities and countryside
- Advocacy: making the case for the role of culture within all aspects of policy and for their role in adding value to other commercial and industrial sectors
- Image: through culture, making Cheshire and Warrington a great place to live, work, visit and do business with.
- Cultural education: enabling children, young people and adults to access cultural education.

The Tourism Strategy for Cheshire and Warrington categorises tourism assets under four lead products:

- Chester - attractions and specific heritage products attract regional day visitors and domestic and overseas leisure short breaks
- Countryside - including a significant number of small to medium sized country houses and gardens (many of which are in the ownership of the National Trust).
- Family Fun - Family attractions include the Ellesmere Port Boat Museum, Tatton Park and Quarry Bank Mill
- Meetings and Conferences.

Cheshire and Warrington also have a number of specialist products - Gardens, Heritage, Industrial Heritage, Waterfront. The strategy recognises the value of all specialist products and the contribution they make to the visitor experience and the tourism industry.

Cheshire and Warrington tourism products have been identified as primarily appealing to the ABC1 empty nesters (excluding the family product offer) with a strong focus on the AB socio-economic groups at particular venues.

Merseyside - Tourism

In 2002 UK residents made 2.5 million trips to Merseyside staying 6 million nights and spending £392 million. Overseas residents made 0.25 million visits staying 1.5 million nights and spending £67 million (*Source: UKTS/IPS*) The distribution of the volume of tourist visits to Merseyside amongst the area's districts is estimated to be: Liverpool 39.2%, Sefton 26.6%, Wirral 21.2%, St Helens 7.2%, Knowsley 5.8%.

Tourism is now a major industry on Merseyside, generating £604 million of spending in the local economy and supporting 21,800 jobs. The sector has been growing at around 5% per year since the mid 1990s and looks set to accelerate in coming years. Occupancy rates in Liverpool have remained high at 72%, compared to 58% nationally and 65% in the North West. Visitor numbers to Merseyside's major museums and galleries rose by 79% in 2002 to reach a record total of 1.2 million compared to the national free museum average of 69% (and 63% in Manchester). (*Source: Merseyside Economic Review 2003*).

Brands

Liverpool has been identified as one of the five 'attack' brands that attract visitors to the North West. Slipstream brands include culture (relevant to National Museums Liverpool, and the collections at Liverpool Cathedral) and waterfront, including Albert Dock (and Tate Liverpool).

Tourism Strategy

The Tourism Vision and Strategy for the Liverpool City Region entitled "Winning Tourism for England's North West" was published in June 2003. The strategy aims to increase the economic, social and environmental benefits of tourism to the Liverpool City Region and to improve the profitability of tourism businesses. The primary objective for the strategy is to achieve higher yield business all-year round for all sectors of the industry, by targeting an optimum mix of market segments.

To compete effectively with other City Regions, the Liverpool City Region needs to develop and market specific 'visitor experiences', increase market awareness and improve perceptions of the area. The strategy focuses on developing seven core visitor experiences targeted at growth market segments: Conferences, Culture and Heritage, Essential Liverpool, Beatles, Sport, Classic Resorts and Major Events.

A development plan for each of these experiences has been outlined and a 'route to market' identified. A further six emerging/niche experiences have also been highlighted for future attention: Genealogy, Bird Watching, Cruises, Film and TV, Horticulture and Education.

Greater Manchester - Tourism

In 2002 UK residents made 4.4 million tourist trips to Greater Manchester, staying 11.9 million nights and spending £736 million. Overseas residents made 0.73 million visits, staying 4.5 million nights and spending £245 million. This is a total of 5.13 million tourist trips.

A recent report for Marketing Manchester estimates that tourism in 2001 contributed £1.7 billion to the county, a growth of nearly 9% since 1999 and in contrast to a downturn nationally. This accounted for the equivalent of 33,000 full-time jobs. This demand, as well as a brighter future anticipated for the area signified by activities such as the 2002 Commonwealth Games, has generated a spate of new hotel developments. However, given the region's industrial heritage as the cradle of the industrial revolution, major manufacturing companies are based and flourish in and around the area.

Brands

The regional vision for the future of tourism has identified Manchester as the lead attack brand in the delivery of a prosperous tourism industry for the Northwest. Key slipstream brands are industrial heritage and culture (The Lowry, Imperial War Museum North).

Manchester: Knowledge Capital

Manchester's core city prospectus *Manchester: Knowledge Capital* argues that the cultural renaissance of Manchester has helped to create an infrastructure that is arguably the best in UK

and comparable with other international cities. The prospectus lists Manchester's flagship facilities and venues as: Urbis; the Lowry; Imperial War Museum North; Bridgewater Hall; Manchester Evening News Arena; G-Mex; Manchester Art Gallery and SportCity. Iconic cultural facilities include the newly redeveloped Manchester Art Gallery, the Lowry and the Imperial War Museum North, the first building in the UK to be designed by the internationally-renowned architect Daniel Libeskind.

Cultural Strategy

Manchester's Cultural Strategy takes forward the cultural theme of Manchester's Community Strategy. It has five themes:

- Cultural capital - Developing and sustaining the cultural infrastructure of the creative capital and securing the benefits of cultural investment:
- Culture and learning - Developing the role of culture in learning and improving educational attainment
- Culture for all - Encouraging the participation of residents in cultural activities
- Cultural economy - Developing and sustaining the cultural economy
- Marketing culture - Co-ordinating marketing and events to increase the profile of the city as a cultural destination

Tourism Strategy

In 2003 Marketing Manchester published *A Five Year Tourism Strategy for Greater Manchester 2003-2008*. The strategy has been divided into five themed strands:

- Image - Develop the Manchester brand through promotion of the city to focus on the contemporary and traditional strengths of the city-region's culture
- Events - Increase the interest in, and visitors to, the city through the creation of a world class events programme that builds on the success of the Commonwealth games and strengthens the Manchester brand.
- International Destination - Position Manchester as a vibrant international destination, which also acts as a gateway to the North West and represents an alternative gateway to Britain
- Business City - Ensure that Manchester is further established as one of Europe's leading business destinations
- Infrastructure - Support the enhancement of the tourism product in Greater Manchester through the development of tourism infrastructure.

Lancashire - Tourism

In 2002 UK residents made 5.1 million trips to Lancashire, staying 14.8 million nights and spending £859 million. Overseas residents made 0.23 million visits staying 1.9 million nights and spending £78 million. (Source: UKTS/IPS)

Tourism is a major economic activity in Lancashire and one of the county's most important industries. The established tourism coastal resorts of Blackpool and Morecambe dominate tourism activity in Lancashire.

11% of all trips are visiting friends and relatives, staying an average of just under 3 nights, with an average trip spend of £50.31 – in areas where the profile of tourism is less established this percentage is likely to be higher (source: Cambridge Economic Impact Model 2000).

Brands

Blackpool has been identified as one of the attack brands in the North West. Slipstream brands in Lancashire include Historic Towns e.g. Lancaster (Lancaster City Museums) and History e.g. historic houses (Rufford Old Hall, Astley Hall, Museum and Art Gallery, Gawthorpe Hall, Towneley Hall Art Gallery and Museums) and industrial heritage (textile museums).

Cultural Strategy

In 2003 Lancashire County Council published *Culture Matters: The Cultural Strategy for Lancashire 2003-2006*. Lancashire's Cultural Strategy will deliver

- A higher profile for culture and all its components – by bringing together a clearer and more coherent picture, a critical mass, and making synergy possible
- Greater sub-regional cultural power and organisation – by giving Lancashire a more convincing 'brand' and visibility within the wider north west and beyond
- A better understanding of what we share as well as our diversity – by making common cause and bringing together disparate interests under one 'flag'
- A better use of existing resources and access to more – by allowing for economies of scale, joint working and putting together initiatives and bids with more weight
- Structures to share information, plan and add value – by creating new understandings and partnerships and providing more effective means of planning
- Evidence to prove success – by demonstrating value and raising the profile of culture

The Strategy lists examples of how culture has contributed to the aspirations of the County Council. The following are examples relating specifically to museums:

- Adult learning programmes have been established in all museums for which the County Council has responsibility.
- The Heritage Trust North West is leading on the development of Lytham Hall as a cultural resource for the region and as a high class tourist attraction. This is receiving support from the Lancashire Tourism Partnership as part of the Fylde Coastal Regeneration Initiative.

Key cultural facilities highlighted in the cultural strategy are: The Harris Museum and Art Gallery housing collections and exhibitions of regional and national significance, the Judges' Lodgings, Haworth Art Gallery - home of the largest collection of Tiffany glass in Europe, over 100 museums and heritage centres, the National Football Museum, historic houses- including five in the care of the Museums Service and Queen St Mill - Lancashire's last steam powered weaving shed.

Other Groups And Specialist Interest Markets

Coach visitors

- Coach excursion trips: organised and promoted by local and regional coach operators. These are often day or half day excursions from both home and holiday resorts. Markets are, in the main older middle-aged to elderly, with a bias to female. These are price sensitive buyers (coach operator decision-makers), and very aware of competitive offers and packages with incentives to attract drivers and/or reduce costs.
- Coach holiday groups: these are groups taking excursions from a coaching holiday (either resort-based or tour). This traditional form of holiday remains popular with the older market, although UK destinations are competing with more challenging overseas packages. Britain's coach operators play a vital role in ensuring that overseas and domestic visitors see the country's major tourist attractions. The coach business has an annual turnover of £1 billion, has a 12% share of the UK inward tourism market and a 10% share of the outward tourism market. Coach tours generally account for about 8% of visits to attractions. This market is relatively easy to access with published directories and mailing lists available. However, the market is price sensitive and there is significant competition for inclusion in coach day visit/tour stop itineraries from retail-led or public sector uncharged attractions allowing free admission and offering a surprising range of incentives to coach drivers. Familiarisation visits for drivers/coach excursion operators and local accommodation operators can be very worthwhile, particularly in the context of a relaunch of 'new or improved' facilities.

Specialist Interest Groups

Special interest markets typically represent a small proportion of visits to attractions, although they have the advantage that special interest visitors are likely to be prepared to travel further.

Competition

Museums and galleries increasingly face competition, not only from other types of attractions, but from other ways of spending leisure time, such as garden centres, eating out and home entertainment. Relatively recent developments in leisure activities such as computer games, multiplex cinemas, the internet, health and fitness clubs and Sunday shopping have all increased in popularity in recent years. While these activities may not appear to be in direct competition with museums and galleries, the fact that they account for more of peoples' leisure time is likely to mean that people spend less time participating in traditional leisure activities.

Conclusions

Trends described above suggest that the durability of heritage-led visits will be sustained in particular among the older adult market, (a growth market) though opportunities should be explored to increase the appeal of heritage to family groups. Industrial heritage, for example is well placed to respond to family needs e.g. at working attractions which appeal to children and at museums and galleries where children focused activities are provided.

Whilst there continues to be business to be won by museums in providing for the formal education sector, a much more systematic and joined up approach is required to maximise museums' potential and take up by schools and achieve government contact targets. The development by NWMLAC of the regional schools strategy will be a key instrument in this process and the EPDP for the Hub museums and galleries is an important foundation on which this will be built.

Key to success and maintaining competitiveness will be to ensure "bookability"; "accessibility of information" and "completeness of experience". These factors will become increasingly as important as other established factors e.g. value for money and quality.

Regional and local factors, however, are often as important in determining market appeal as the subject matter and the style and imagination employed in its presentation.

Increasingly, too, 'virtual' users should be treated as a market category in their own right, whether they are accessing formal distance learning programmes or making informal web-based visits. Evidence from recent research for the EPDP and the consultation survey supports the view that little is known about these users and that few web sites are developed and operated in ways that maximise their audience reach potential.

Sub-regional Population and Economic Profile

Cumbria- Population and economic profile

The population of Cumbria is 488,000, one of the most sparsely populated counties in England (Source: Office for National Statistics 2001 Census). South Lakeland is the most populated district with just over 102,000 people, followed closely by Carlisle. Eden has the smallest population, but has been the fastest growing since 1991. Both Eden and South Lakeland show higher than national average population growth rates. This is almost certainly due to relatively high in-migration rather than natural growth. Barrow has the highest population density at 9.2 people per hectare, though it is a much more geographically confined area than the other five districts. Around two thirds of the population of Cumbria live in the larger urban areas. A further fifth live in a more rural environment, including small towns and large villages. The remainder live in remote rural areas: Cumbria has a higher proportion of people living in these areas than any other County in England.

Looking at the profile for the whole of Cumbria, the main features are the relatively high proportion of people aged 50+, and the disproportionately low numbers of people in the 15 to 34 age ranges, particularly the 20 to 24 age group. This data is consistent with the likelihood of relatively high levels of in-migration amongst older age groups, perhaps for retirement purposes or quality of life' reasons.

Census findings may be summarised as follows:

- Relatively high levels of part-time employment, particularly in Barrow and Carlisle (although these are the most urbanised districts of Cumbria and may offer proportionately greater work opportunities in sectors such as retailing)
- Relatively low proportions of full-time employment across the county as a whole, but more particularly in Barrow, Eden and South Lakeland

- Significantly higher proportions of self-employment in Eden and South Lakeland (possibly a reflection of the rural nature of these areas e.g. self-employment in agriculture), in contrast to a low proportion of self-employment in Barrow district
- Contrasts in unemployment, particularly between Barrow/Copeland and Eden/South Lakeland
- The higher than UK average figures in the retired category, most especially in South Lakeland

Barrow has the highest level of deprivation in Cumbria, coming within the top 75 most deprived districts in the country. In contrast to this South Lakeland scores zero, being one of 45 districts in England with no deprivation score.

The 1991 Census included, for the first time, a question on ethnic group. In Cumbria the 'White' group formed 99.6% of the total population. As a consequence the demand for services to meet the needs of particular ethnic groups is more limited than in many parts of the country. (Source: Cumbria County Council)

Cheshire – Population and Economic profile

The population of Cheshire (including Warrington and Halton Unitary Authorities) is 984,000 (Source: Office for National Statistics 2001 Census). This accounts for 1.3% of the population of England and Wales and 10% of the North West. 20% of Cheshire's population is under the age of 16.

According to the 2001 Census, 12,357 (3%) people aged 16-74 were unemployed, the lowest rate of unemployment of all regions in the North West. For males aged 16-74 the unemployment rate was 3% and for females (aged 16-74) this was 2%

The prevailing image of Cheshire, outside of Chester, suggests a relatively affluent place of pleasant countryside and market towns. However there are significant areas of social disadvantage, heavy industrial development and rural deprivation.

All districts had similar proportions of non-white ethnic groups with Chester and Crewe & Nantwich districts having the slightly higher proportions (2.0%) whilst Congleton and Ellesmere Port & Neston districts had the lowest (1.2%). All districts had a lower proportion of non-white ethnic groups than the average for the North West and England & Wales (5.6% and 8.7% respectively). There were a marginally higher proportion of Asian and mixed ethnic groups (each 0.5%) than any other non-white ethnic groups in Cheshire (Source: Cheshire County Council Research and Intelligence Unit).

Merseyside – Population and Economic profile

Merseyside (Metropolitan County) is one of the UK's most densely populated urban areas with 1,362,000 people living in the six districts - Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral - covering an area of 729 square kilometers (Source: Office for National Statistics 2001 Census).

The unemployment rate in Merseyside is 7.9%, highest of the five regions in the North West. Despite this, a range of employment indicators suggest that there has been strong employment growth within Merseyside between 1996 and 2002. The unemployment claimant rate for Merseyside fell from 12.5% in 1996 to 5.7% in 2002. Whilst this rate remains above the United Kingdom (3.1%) and North West averages (3.5%), it is not too dissimilar to other comparator City Regions that have faced major industrial change over the last decade (including Tyneside, Metropolitan Glasgow and the West Midlands).

There are major differences in the level of ILO unemployment between Merseyside's districts pointing to the very different experiences and opportunities facing the workforce across these areas:

- In 2001 Halton (5.0%) was the only district within Merseyside to have a lower unemployment rate than the national average (5.1%).

- Unemployment was highest in Knowsley (12.0%) and around 50% higher than the Merseyside average. Despite fairly strong employment growth in Knowsley (and to a lesser extent in Liverpool and Sefton), unemployment has remained relatively high.
- Unemployment within all of Merseyside's districts continues to be characterised by its concentration both within particular neighbourhoods and particular groups.

The analysis suggests that Merseyside's labour market is becoming more integrated with the wider region. For the first time there are more Merseyside residents with jobs than there are actual jobs within the sub-region. This suggests that there has been growth in out commuting for work. This is important in so far as it could help to reduce the number of people who move out of Merseyside in search of work.

Poverty and social exclusion remains one of the greatest challenges for Merseyside. Although income deprivation is concentrated in Liverpool and Knowsley, the Index of Multiple Deprivation shows that across Merseyside as a whole 40% of its wards are ranked in the top 5% of the most income deprived wards in England and over two thirds are ranked in the top 20%. Apart from Halton, all the Local Authorities lie within the top 20% of most income deprived in England. For Liverpool and Knowsley the percentage on income support and job seekers allowance is around twice the North West average. Merseyside. Inactivity tends to be high in this group, possibly due to women participating in higher and further education and/or taking time out to raise a family. (Source: Merseyside Economic Review 2003).

In the 2001 Census white ethnic groups formed the largest majority (97.1% of the population). The largest non-white ethnic group in Merseyside is Chinese, accounting for 0.6% of the population.

Greater Manchester – Population and Economic profile

The population of Greater Manchester (Metropolitan County) is 2,483,000 (Source: Office for National Statistics 2001 Census). In 2001 26% of the population were aged under 20, 54% were aged 20-59 and 20% were aged over 60. 37% of the population of the North West live in Greater Manchester (Source: A Strategy for Greater Manchester).

The unemployment rate is 5.1%. Within Greater Manchester, unemployment ranges from 7.9 % in Manchester to 2.0 % in Stockport.

All Greater Manchester local authority areas come within the worst 33% of the Government's deprivation index (Source: A Strategy for Greater Manchester). The city is the seventh most deprived district in England with over 80% of its wards in the top 10% most deprived wards in the country (Source: Manchester's Cultural Strategy).

Recent results from the 2001 Census confirm that the inner city district of Manchester is a multicultural centre with a significant ethnic minority comprising 19% (1991, 2.6%) of the district population. The largest group (5.9%) is Pakistani. Sizeable Pakistani populations are also to be found in the neighbouring districts of Oldham (6.3%) and Rochdale (7.7%). A large Indian population (6.1%) lives in neighbouring Bolton. Significantly, 10.6% of all Pakistanis and 7.3% of all Bangladeshis in England reside in Greater Manchester. The huge catchment population within Greater Manchester, in terms of human resources and purchasing power, is of great interest to both manufacturing inward investment and new service operations (Source: Greater Manchester Economic Review)

Lancashire –Population and Economic profile

The population of Lancashire (including Blackburn with Darwen and Blackpool Unitary Authorities) is 1,416,000 (Source: Office for National Statistics 2001 Census). The numbers of people aged 65 and over are higher than the national average, and there are fewer in the 20 – 44 age group. Overall the population has increased in recent years, however in some areas it has declined, particularly with the outward migration of younger, often better qualified, age groups (Source: Cultural Strategy for Lancashire).

At January 2004, Lancashire had an unemployment rate of 1.9%. Unemployment rates range from 0.7% in the Ribble Valley to 3.7% in Blackpool Unitary Authority (Source: Lancashire County Council). Low pay and low skill levels are key issues, particularly in East Lancashire.

The patterns of deprivation in Lancashire are complex, with some pockets of the County experiencing the extremes of severe deprivation. Several wards in the County are ranked in the worst 0.5% in England. Some 12% of Lancashire's wards are in the worst 10% in England (Source: Lancashire County Council). Four Lancashire districts, Burnley, Hyndburn, Pendle and Preston, are ranked amongst the most deprived in the country according to the national index of Multiple Deprivation.

In the 2001 Census 1.32 million or 93.4% of the 1.41 million residents in Lancashire (including Blackburn with Darwen and Blackpool Unitary Authorities) gave their ethnic group as white British, Irish or other white background, slightly more than the national average. A further 93,300 or 6.6% of the Lancashire population were included in a range of other ethnic groupings. East Lancashire contains the highest proportion of ethnic minorities, representing 11.8% of the total population of the area, whilst in comparison the proportion in North Lancashire is 1.6%.