



House of Commons
Committee of Public Accounts

Promoting Participation with the Historic Environment

Fifth Report of Session 2009–10

*Report, together with formal minutes, oral and
written evidence*

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The Committee of Public Accounts

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Powers of the Committee of Public Accounts are set out in House of Commons Standing Orders, principally in SO No 148. These are available on the Internet via www.parliament.uk.

Publication

The Reports and evidence of the Committee are published by The Stationery Office by Order of the House. All publications of the Committee (including press notices) are on the Internet at <http://www.parliament.uk/pac>. A list of Reports of the Committee in the present Session is at the back of this volume.

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Summary

Many people care deeply about and value the nation's heritage. Widening opportunities for people to interact with the historic environment has been a policy objective of the Department for Culture, Media and Sport (the Department) for a number of years. In 2005, the Department agreed targets to increase the numbers of people who visit historic sites from three priority groups—those with a limiting disability, those from lower socio-economic groups and those from black and minority ethnic groups.

The Department missed its targets to increase visits from two of the three priority groups but has no idea why. It has not conducted research into how achievable the targets were, or how they would be met, and the survey for measuring visits to historic sites does not allow the Department to evaluate the impact of its own activities or those of its main delivery agent, English Heritage.

English Heritage is the Government's statutory adviser on the historic environment and has a critical role to play in increasing public support and interest in heritage. But in recent years it has been faced with a decline in public funding, coupled with an increase in its responsibilities, and has therefore prioritised increasing the money it makes from visitors to its sites. The Department reached agreement with the English Heritage on what it would do to support the Department's objectives for participation in the future only just in time for our hearing, and over half way through the current funding period. Such weak accountability creates serious risks to value for money.

The Department did not convince us that having a target focussed on increasing visits from those in underrepresented groups to historic sites served a useful purpose. The proportion of the population visiting historic sites is already high and most of those who do not do so say they are not interested in heritage. Furthermore, the historic environment can be experienced and enjoyed by walking down the street, visiting a local church, watching television or using the internet. Building stronger public support will depend on taking an inclusive approach to what constitutes our heritage and in particular on developing an interest in heritage in children of all backgrounds. English Heritage has assured us that it will reverse the concerning downwards trend in educational visits to its own sites.

On the basis of a Report by the Comptroller and Auditor General,¹ we took evidence from witnesses from the Department for Culture, Media and Sport and English Heritage, on the actions taken to achieve the Department's objective to get more people interested in heritage.

1 C&AG's Report, *Promoting Participation with the Historic Environment*, HC (2008–09) 881

Conclusions and recommendations

1. **The Department's targets for broadening the audience for heritage were unrealistic and set without clear evidence of how they would be achieved.** The proportion of the population visiting historic sites is already high and the most reported reasons why people don't visit these sites is because they are not interested in the historic environment. Before setting targets in future, the Department should:
 - a) use existing knowledge of what works to make a clear action plan that shows how its objectives will be delivered. It should involve key parties, such as English Heritage, in assessing the realism of targets to which they will contribute, and
 - b) undertake a full examination of the costs and benefits of achieving the targets and balance this against other spending priorities.
2. **The Department has not developed any effective means to measure the contribution it or its sponsored bodies make towards its objectives. It did not meet two of its three targets for increasing visits to historic sites, but could not explain why.** The *Taking Part* survey measures progress against the Department's targets but cannot show a causal link between actions taken and what is achieved. The Department should identify more direct and cost-effective ways of measuring its impact, and that of its sponsored bodies.
3. **The Department funded English Heritage for 19 months without setting clear expectations about what it would deliver for the money.** Agreeing measures to monitor performance on key policy areas provides essential accountability for taxpayers' money. In future, the Department should agree what its sponsored bodies will deliver before it releases the related funding.
4. **Several government-funded organisations across the cultural sector are seeking to attract new audiences, and there is a risk that they might waste resources through duplication of effort.** The Department should collate information about what works in attracting new audiences across sport, culture and the arts, and disseminate it across its sponsored bodies. It should promote cross-fertilisation of knowledge, such as by inviting specialists from other sectors onto the Broadening Access Group which English Heritage chairs.
5. **The Department's definition of 'participation' with heritage is obsolete.** As well as by visiting historic sites, there are many more opportunities to enjoy our heritage such as by getting involved in local conservation projects, by learning on the internet, and by watching historically-based television programmes. The Department and English Heritage should research how people interact with the historic environment, and use this knowledge to inform their strategies and performance measures for getting more people interested in heritage.

6. **In the last five years free educational visits to English Heritage's sites have fallen by 20%.** This concerns us, as positive childhood experiences are crucially important to instilling a long-term interest in heritage. English Heritage should develop an action plan that addresses the obstacles to visiting heritage sites and identifies ways to encourage school visits by children from different backgrounds. It should aim to reverse the decline in educational visits to its own sites, set milestones to measure progress, and report back to this Committee in April 2010 setting out the actions being taken and the progress made.
7. **English Heritage's workforce is less diverse than other government departments, and does not reflect the general population.** This is, in part, because of the specialised nature of some professional roles, but also suggests English Heritage has not placed sufficient importance on achieving a more diverse workforce. English Heritage should develop an action plan to increase the diversity of its workforce, and set milestones for measuring progress and achieving outcomes.
8. **English cathedrals represent some of our most important architectural heritage yet many of them charge the public for entry.** These buildings are expensive to look after and the Department and English Heritage should work together to find ways to fund their conservation so that they can be less reliant on charging for entry, which could deter people from visiting.

1 How the Department works with its sponsored bodies to deliver its objectives

1. Widening opportunities for people to participate in cultural activities has been a policy objective of the Department for Culture, Media and Sport (the Department) for a number of years. We took evidence on the Department's plans to deliver, with English Heritage, Public Service Agreement targets to increase visits to the historic environment by individuals from three priority groups—those with a limiting disability, those from lower socio-economic groups and those from black and minority ethnic groups. When the Department agreed these targets in 2005, it did not know how achievable they were. The proportion of the population that visit historic sites is already high, at around 70%, and the majority of people who do not currently visit historic sites stated that they were not interested in doing so.² Furthermore, the targets were based on achieving an increase “which could be measured and would be statistically significant” rather than an analysis of what worked and the resources required.³ Both English Heritage and the Department admitted that they lacked an understanding at the outset about how to engage with sufficient numbers of people from the priority groups.⁴

2. English Heritage's principal objective, “to pass on to future generations the best of our past so that it can form a positive part of the future” is consistent with the Department's objectives for participation. However, faced with a real terms decline in funding from the Department and an increase in its responsibilities, English Heritage had focused on increasing its income from the properties it operates as visitor attractions, at the expense of activities to promote participation.⁵ English Heritage acknowledged that its contribution towards the Department's target to increase visits to historic sites had been limited. The 75 to 85 outreach projects it ran each year reached around 30,000 people from the priority groups, which was probably too few to have an impact on the targets.⁶ The Department missed two of its three targets for heritage between 2005 and 2008—those relating to people with a limiting disability and people from lower socio-economic groups—despite English Heritage exceeding all its own targets to increase participation amongst the priority groups.⁷

3. Neither the Department nor English Heritage could explain why targets for each priority group had been met or missed as they did not understand the ‘mechanics’ or the interaction between the different factors affecting participation.⁸ The Department measures its progress towards its participation targets using the annual Taking Part survey, which covered some 80,000 people in total between 2005 and 2008. However, the results of this survey did not allow the Department to measure the impact of its own actions, or those

2 Qq 53 and 93

3 Qq 64–69 and 134–135

4 Qq 68–69

5 Qq 1–6 and 11–16; C&AG's Report, paras 15 and 3.2

6 Qq 9 and 71

7 Q 7

8 Qq 75–76 and 91

of English Heritage.⁹ Furthermore, the survey results became available some nine months after the end of the year they related to, meaning that progress against the targets was reported too late to take remedial action.¹⁰

4. The funding agreement between the Department and English Heritage for the 2008 to 2011 spending period was finalised just in time for our hearing. For the preceding 19 months some of the things English Heritage would deliver with the funding it received from the Department had not been formally agreed.¹¹ The Department had not set out what it required of English Heritage in respect of increasing participation or its educational activities, both crucial areas in building a broader base of interest in heritage.¹²

5. There has been no change in policy and the Department remains committed to widening opportunities to participate in culture and sport. However, the Department no longer has a specific target to increase participation in the priority groups because the Government required it to reduce the number of targets it set from 2008.¹³ The Department still asks English Heritage to report the number of visitors to its sites from the priority groups. English Heritage has committed to increase the number of visitors from the priority groups, and is measuring its progress by carrying out visitor surveys at its top ten sites.¹⁴ It has not, however, set a specific target.¹⁵

6. The Department has also sought to encourage greater participation in other areas of the cultural activities it funds. For example the Royal Opera House and the Royal Ballet have done outreach work with schools. The Department told us it had capitalised on the knowledge that exists across sectors, although it offered no specific examples.¹⁶

9 Q 76; C&AG's Report, paras 14 and 1.13

10 Qq 129–130

11 Qq 17–22

12 C&AG's Report, para 1.15

13 Qq 132–133

14 Qq 38–44

15 Qq 46 and 131–132

16 Qq 62–63

2 Removing the obstacles to greater participation in heritage

7. Many people care deeply about, and value, the historic environment. This Committee supports the principle that heritage should be accessible to all and reflect the full spectrum of our culture, not least because many heritage sites are recipients of public funding.¹⁷ The definition of heritage should encompass everything from castles, stately homes and palaces, to local heritage on our doorstep: industrial heritage like the Ice Factory in Grimsby, Salts Mill and Dean Clough; religious sites such as Whitby Abbey and Lincoln Cathedral; and historic cultural buildings such as Morecambe Winter Gardens and Manchester Town Hall.¹⁸

8. Both the Department and English Heritage agreed that the Department's target to increase "visits to designated sites" was too narrow a measure of their shared aspiration to get more people interested in heritage.¹⁹ There are many more ways of participating than visiting a heritage site which encourage people to value, protect and learn about heritage.²⁰ For example, television and the internet can be effective ways to engage new and diverse audiences and build public support.²¹ The Department's current targets for participation do not adequately reflect the diversity of ways in which people interact with heritage, and the Department did not convince us of the case for retaining participation targets as they are currently defined.²²

9. Research conducted by English Heritage found that being taken to a historic site as a child is the single most important factor in determining whether people visit historic sites as an adult.²³ Educational programmes run by the heritage sector, including those which encourage children from different backgrounds, are therefore fundamental to the long-term popularity of heritage. It is creditable that English Heritage's educational activities have won 18 awards in the last three years.²⁴ However, there has been a concerning decline in free educational visits to English Heritage's sites (**Figure 1**). English Heritage acknowledged that its target of 650,000 free educational visits a year to its sites by 2010, set in 2005, was over-ambitious and has revised this down to 428,000 free educational visits a year by 2011.²⁵ Meeting this revised target would represent an increase of 3.2% on the number of visits in 2008–09.²⁶

17 Q 53

18 Qq 113–115, 128 and 136

19 Qq 113–114

20 Qq 95–97 and 114–116

21 Qq 48–52 and 97

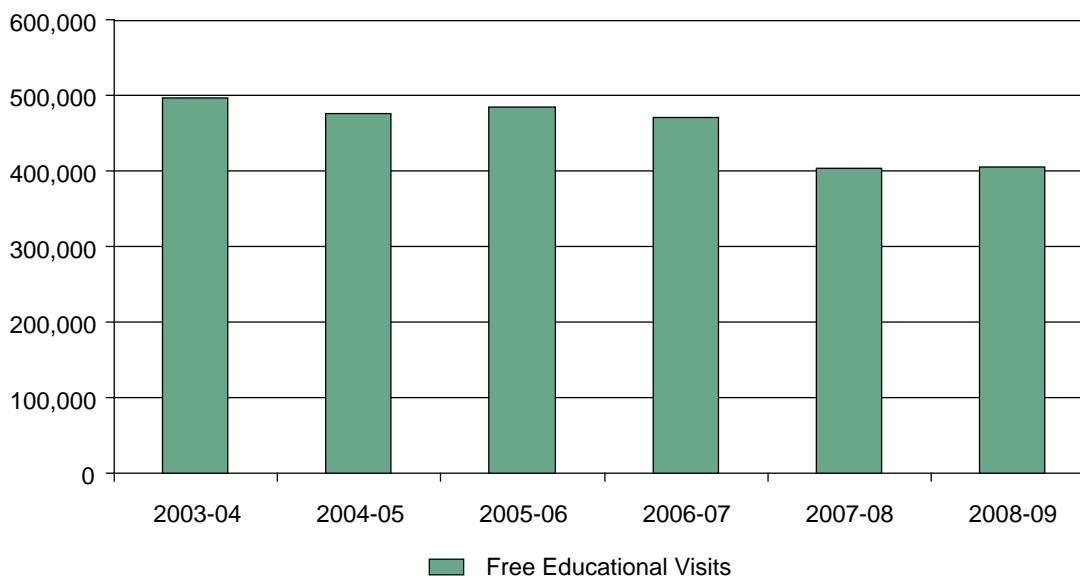
22 Qq 33–34 and 83

23 Qq 63 and 86; Centre for Economics and Business Research, *Quantitative Analysis of data from the Taking Part survey (2007)*, (http://www.english-heritage.org.uk/hc/upload/pdf/Quantified_analysis_summary_report_cebr_tagged.pdf/1257204856)

24 Qq 54, 86 and 114; C&AG's Report, Figure 10

25 Qq 56–57; English Heritage funding agreement, 2008–2011

26 Q 90

Figure 1: Free educational visits to English Heritage sites have fallen by 20% since 2003–04

Source: *English Heritage data*

10. Numbers of educational visits have fallen because of the complexity of organising trips to historic sites, which are often in rural settings. Issues include health and safety concerns, the cost of transport and the need to find cover for teachers who run the trips.²⁷ English Heritage acknowledged that these factors had not changed during the period when educational visits had fallen, and that the decline in visits was in part because it had been slow to find solutions. English Heritage had taken steps to address the issues facing teachers, providing teachers with support before their visit including ‘ready made’ risk assessments for visits to its sites.²⁸

11. People who, having completed their education, chose to work in the heritage sector, for example as historians or archaeologists, tended not to come from a diverse range of backgrounds. This had contributed to the striking lack of diversity in English Heritage’s own workforce (**Figure 2**). English Heritage has now recognised this issue and has committed to address it.²⁹

12. English Heritage has recently published a survey of cathedrals, which underlines the extent of the work still to be done to preserve these important buildings.³⁰ We welcome English Heritage’s recognition of the urgent need to act to maintain such a valuable part of our historic environment. However, we are concerned that so many churches and cathedrals now have to charge an entry fee in order to raise money for essential conservation work. While the cost of entry to a heritage site was not one of the top reasons that people said prevented them from visiting, finding ways to provide free access could

27 Q 55

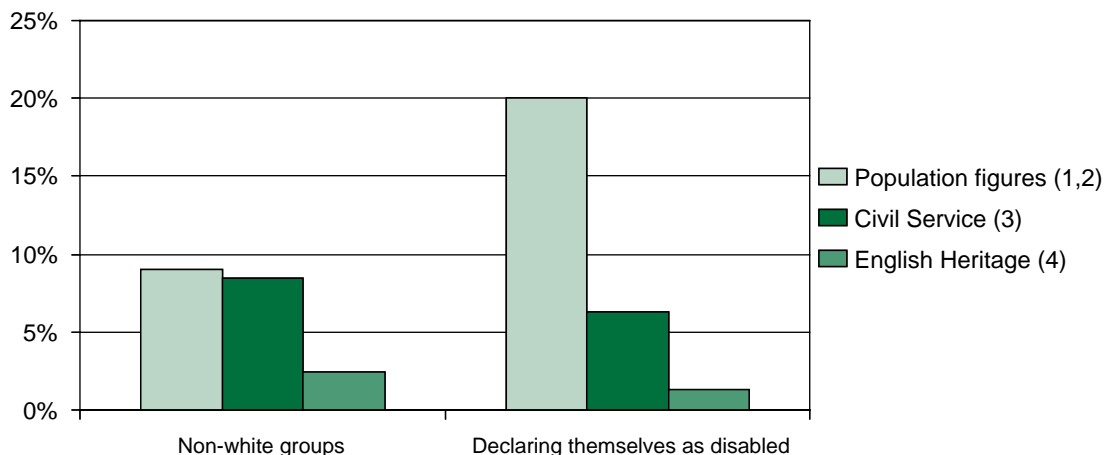
28 Q 57

29 Qq 8–10 and 78–82

30 Q 136; English Heritage, *Cathedrals 2009*, (2009) (<http://www.english-heritage.org.uk/server/show/nav.21424>)

generate interest and goodwill and could encourage people to try new things and value these buildings that define our heritage.³¹

Figure 2: English Heritage's workforce is considerably less diverse than the wider population, and the civil service



Note: There is currently no requirement for public sector employers to collect information about its employees' backgrounds, for example socio-economic status

Sources:

1. *Non-white groups: 2001 Census.*
2. *Limiting Disability: Department for Work and Pensions 2004 estimate of levels of disability in population of working age.*
3. *Civil Service Statistics 2008 – Office of National Statistics, Statistical First Release.*
4. *English Heritage Annual Accounts 2008/09.*

13. English Heritage has for a number of years sponsored Heritage Open Days. Through this initiative, which takes place over one weekend in September, English Heritage seeks to raise awareness of the historic environment by opening sites that are normally closed to the public, and giving free access to others which normally charge a fee.³² English Heritage did not open any of its fee-charging properties for free until 2006, when it had opened all its properties for free as part of the *History Matters* campaign. In 2008, English Heritage opened only half of its properties for free, and had no plans to increase this number because it believed that providing free entry to these properties could discourage people from visiting other sites opened by organisations that take part in Heritage Open Days on a voluntary basis.³³ English Heritage also weighed the costs of allowing free entry against the subsequent loss in income.³⁴

31 Q 119, Centre for Economics and Business Research, *Quantitative Analysis of data from the Taking Part survey (2007)*, (http://www.english-heritage.org.uk/hc/upload/pdf/quantified_analysis_summary_report_cebr_tagged.pdf?1257204856)

32 C&AG's Report, para 2.6

33 Qq 14 and 104–107

34 Q 13; C&AG's Report, para 2.7

Formal Minutes

Monday 14 December 2009

Members present:

Mr Edward Leigh, in the Chair

Mr Richard Bacon	Rt Hon Keith Hill
Angela Browning	Mr Austin Mitchell
Mr Douglas Carswell	Dr John Pugh
Mr Ian Davidson	Rt Hon Don Touhig
Nigel Griffiths	Rt Hon Alan Williams

Draft Report (*Promoting Participation with the Historic Environment*), proposed by the Chairman, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 13 read and agreed to.

Conclusions and recommendations 1 to 8 read and agreed to.

Summary read and agreed to.

Resolved, That the Report be the Fifth Report of the Committee to the House.

Ordered, That the Chairman make the Report to the House.

Ordered, That embargoed copies of the Report be made available, in accordance with the provisions of Standing Order No. 134.

[Adjourned till Monday 11 January at 4.30 pm]

Witnesses

Monday 9 November 2009

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Mr Jonathan Stephens, Permanent Secretary, Department for Culture, Media and Sport and **Dr Simon Thurley**, Chief Executive, English Heritage

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List of written evidence

English Heritage

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List of Reports from the Committee of Public Accounts 2009–10

First Report	A second progress update on the administration of the Single Payments Scheme by the Rural Payments Agency	HC 98
Second Report	HM Revenue and Customs: Improving the Processing and Collection of Tax: Income Tax, Corporation Tax, Stamp Duty Land Tax and Tax Credits	HC 97
Third Report	Financial Management in the Foreign and Commonwealth Office	HC 164
Fourth Report	Highways Agency: Contracting for Highways Maintenance	HC 188
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Oral evidence

Taken before the Committee of Public Accounts on Monday 9 November 2009

Members present:

Mr Edward Leigh, in the Chair

Mr David Curry
Nigel Griffiths
Keith Hill

Mr Austin Mitchell
Geraldine Smith

Mr Amyas Morse, Comptroller & Auditor General, **Ms Gabriella Cohen**, Assistant Auditor General and **Mr Robert Prideaux**, Director, National Audit Office, gave evidence.

Mr Marius Gallaher, Alternate Treasury Officer of Accounts, HM Treasury, was in attendance.

REPORT BY THE COMPTROLLER AND AUDITOR GENERAL PROMOTING PARTICIPATION WITH THE HISTORIC ENVIRONMENT [HC881]

Witnesses: **Mr Jonathan Stephens**, Permanent Secretary, Department for Culture, Media and Sport and **Dr Simon Thurley**, Chief Executive, English Heritage, gave evidence.

Q1 Chairman: Good afternoon and welcome to the Committee on Public Accounts where today we are considering the Comptroller and Auditor General's Report on *Promoting Participation with the Historic Environment*. We welcome back to the Committee Jonathan Stephens, who is Permanent Secretary to the Department for Culture, Media and Sport, and Dr Simon Thurley, who is Chief Executive of English Heritage. The Department delivers a majority of its services through 73 public bodies which receive 95% of the Department's funds. The Report describes how the Department has worked with English Heritage to increase the diversity of visitors to historic sites. English Heritage's funding has fallen in recent years and it has done well to increase its membership and commercial income. We would like to focus on how they are widening the audience to heritage. Dr Simon Thurley, perhaps I could ask you, what do you think is your number one priority as Chief Executive?

Dr Thurley: To ensure that my organisation, the organisation in my care, fulfils its objectives.

Q2 Chairman: What are these objectives?

Dr Thurley: Certainly one of the objectives is increasing participation.

Q3 Chairman: Is that your main objective? Is your main objective to look after English Heritage, the heritage of the country?

Dr Thurley: Our main objective is to pass on to future generations the best of our past so that it can form a positive part of the future.

Q4 Chairman: All right. I am not disagreeing with that. That has to be your main priority.

Dr Thurley: Absolutely.

Q5 Chairman: Your main priority is passing on the heritage?

Dr Thurley: Yes.

Q6 Chairman: Was it fair then, given the cuts in your funding in recent years, or was it realistic for the Department to ask you to focus on the difficult issue of widening participation?

Dr Thurley: We believe that increasing participation is one of the important things that we can do to ensure that heritage carries on playing a role in the future of this country because you have to build up support with young people, you have to build up support with people whose families may have recently come to this country from other parts of the world and who might not feel that the heritage of England is their heritage. We do believe that the activities we undertake in this area are an important part of our primary mission as I have just described it.

Q7 Chairman: If it was such a priority for you, why did you not set clearer objectives for your organisation to deliver them because you are clearly not succeeding in this, are you?

Dr Thurley: We had a series of agreements with the Department and we were given a series of targets, every single one of which we either achieved or exceeded, and I think that given the complexity of what we are trying to do, we felt that was a reasonable result.

Q8 Chairman: If you look at Figure 5. You say you are succeeding in these targets but you are not doing terribly well, are you? This is the funding, where was the figure about the actual participation? Figure 9, sorry, diversity of English Heritage workforce. I am trying to look at the figure.

Mr Prideaux: Figure 4.

Q9 Chairman: Figure 4, is it, sorry. I am sorry to confuse you; I do not normally do this. If you look at the black and minority ethnic proportion of the population, you are not doing very well, for instance, are you?

Dr Thurley: I am still struggling to find it. Yes, I have it here.

Mr Stephens: It is page 11. Could I perhaps pick up because the figures in Figure 4 are for participation in the heritage environment across the whole of the sector of which English Heritage are part but only account for a small number of visits. They show we did achieve significant increases in two out of the three areas and met the target of three percentage points in one of the areas. In the second area where there was a significant increase it was just over 2%.

Q10 Chairman: How about the diversity of English Heritage's workforce, for instance, Figure 9?

Dr Thurley: I can answer to that, Chairman. We do not have, as it were, a representative workforce and there are some reasons for that, and reasons we are trying to combat. The first point is that many of our staff are operating in extremely specialist areas. They are architectural historians, they are archaeologists, members of various parts of the planning process, and actually in the population as a whole non-white people are under-represented there. We have quite a big task to do to encourage non-white people to join these types of professions. We need to start really working with people when they are at school because it is not possible just overnight suddenly to increase the proportion of our archaeologists, for instance, who are non-white, we just cannot do that overnight because the people out there do not exist. It is going to be a long process, something that we are very committed to but it cannot be fixed on day one.

Q11 Chairman: Look at paragraph 1.11, please. What does being the Department's lead for the heritage sector actually mean in that paragraph?

Dr Thurley: It means that we are the Government's chief adviser on England's heritage and we advise the Department and ministers on all aspects of heritage and that involves advising the Government on its strategy towards heritage as well.

Q12 Chairman: Mr Stephens, if you give English Heritage £125 million a year to be your strategic lead, why did you expect your own staff to take the lead in broadening participation?

Mr Stephens: We give that money to English Heritage to fulfil the full range of its statutory and other responsibilities, of which increasing participation is one but preservation and presentation of its properties is another. Its important role in the planning system is another. That money is going to a wide range of activities and our aim here was to increase participation in the historic environment of all sorts across the sector as a whole. English Heritage has an important role but its properties are something like just 5% of heritage

properties across the UK as a whole. We sought to bring together a core group of lead organisations, of which English Heritage was an important part, to lead on that target across the sector as a whole. That was back in 2005. Now English Heritage, under the current arrangements, are leading the broadening access group across the sector as a whole.

Q13 Chairman: Dr Thurley, is there a conflict between the need to widen the participation and your commercial imperative to make money from your properties?

Dr Thurley: Not at all, in fact the success we have had with our sites—and thank you very much for pointing that out at the beginning—has actually resulted in an increase in participation. About 30% of our visitors fall into the category of priority groups as defined by DCMS, so the day job of opening our sites to the public is attracting a lot of people from these groups anyway.

Q14 Chairman: Why do you then only open half of your properties for free on heritage open days, which is an initiative that you sponsored yourself?

Dr Thurley: We never used to open any of our sites on heritage open days until two years ago when we had a big campaign jointly with the National Trust called History Matters or something like that. That year as a special event we decided to open some of our sites free, and so did the National Trust. It goes against the spirit of heritage open days though, actually, because the whole point about heritage open days is opening sites that are not normally open to the public. If you suddenly drop an entrance charge from a site that is open to the public anyway the risk is that you will take visitors away from volunteer run sites that are not normally open and actually reduce the number of people attending. I am not convinced that opening our sites free on heritage open days is what we want to do.

Q15 Chairman: Mr Stephens, do you think the real problem is you have got all these baronies that you fund but they are really independent of you and you set these targets, very worthy targets, such as widening participation but people like Dr Thurley just get on and do their own thing? His priorities are not your priorities. His priorities are to preserve England's heritage so these targets you set these kinds of organisations are pretty well meaningless because you have very little power or control over them. Why this hearing is important is that this happens not just with English Heritage but many of the other bodies that you work with.

Mr Stephens: I disagree. Preserving heritage is a key part of our role and responsibility. If you think about our four key strategic objectives that we have for now, one is about excellence and the second is about widening opportunity across all our sectors. Those two things seem to me to sum up an awful lot of what English Heritage is doing: preserving what is excellent about the past and making it available to as

many people as possible, and not just doing so through their own properties but through their other interventions and role in the sector as a whole. Moreover, on these two sets of PSAs, the one set in 2005 and the one set in 2008, we have clear delivery plans in place that have been agreed not just with English Heritage but with a range of organisations. As Dr Thurley has said, English Heritage has delivered on what we asked of English Heritage in respect of those PSAs. We also have comprehensive funding agreements in place trying to capture the key indicators across the range of English Heritage's activities to enable us to monitor and, if necessary, intervene on performance. English Heritage is our specialist and expert body but we take a very close interest in its performance.

Q16 Chairman: You are independent, are you not, Dr Thurley, you can do pretty well what you want. They can set these objectives but you get on with running your own show, do you not?

Dr Thurley: That is not true. We have a funding agreement which is discussed and mutually agreed and if we do not meet the targets in it—

Q17 Chairman: Did you not reach a funding agreement this Friday?

Dr Thurley: We presented a funding agreement to our Commission some months ago.

Q18 Chairman: It was agreed this Friday, was it not?

Dr Thurley: I am not sure about that. Was it agreed this Friday?

Q19 Chairman: Finally, because of this hearing, you finally sat down together and worked things out.

Mr Stephens: I am sorry, I understand how you get to that but that is a misrepresentation.

Q20 Chairman: What do you mean? Did it happen or did it not happen?

Mr Stephens: No, when the Secretary of State wrote to English Heritage some five or six months before funding started he set out the key priority deliverables for English Heritage and drew attention to the importance of their role in contributing to this specific objective. The first draft of the final funding agreement was drawn up and discussed with English Heritage in the summer of 2008. A draft was agreed and approved by the Commission in autumn 2008. The final paperwork to sign off on that has taken too long, it should have been done quicker.

Q21 Chairman: Did it happen this Friday? Finally signed off this Friday just in time for this hearing?

Mr Stephens: Throughout this period the indicators have been agreed and have actually been monitored, so performance management has been going on.

Q22 Chairman: That is all Mandarin speak for saying that Simon Thurley was running rings around you and you finally signed something off this Friday.¹

Mr Stephens: Far from it. It is saying that every six months we sit down with English Heritage against an agreed set of key performance indicators which include visits to English Heritage properties, the take-up of family visits, other educational activities, a range of key deliverables, performances discussed on a regular basis and all this against what are acknowledged to be very challenging targets². The target for black and minority ethnic participation in the historic environment was achieved in 2007–08, there was a significant increase in the participation of lower socio-economic groups and English Heritage played a full part in that.

Q23 Mr Curry: English Heritage, Dr Thurley, should build in longitudinal evaluation at the start of the initiative. I have not the faintest idea what a longitudinal evaluation is unless it is to measure somebody who is dead to see how tall they were. Have you the faintest idea what a longitudinal evaluation is?

Dr Thurley: I have.

Q24 Mr Curry: You think it would help the heritage if it was put in English, would you not?

Dr Thurley: Of course this is not our report, it is the NAO's Report.

Q25 Mr Curry: Yes, I know. You agreed it. You must have understood what it meant.

Dr Thurley: The choice of words probably was the NAO's. The principles behind it we did agree.

¹ *Note by witness:* The final funding agreement was given to the NAO, following a request, on the previous Friday, but it had been agreed earlier. The then Secretary of State for Culture, Media and Sport, James Purnell, first wrote to English Heritage on 18 December 2007 to confirm their funding allocation from the 2007 Comprehensive Spending Review. This set out 13 priority areas, including Heritage Protection Reform and PSA delivery, for the 2008–11 period to which this funding would apply. A draft funding agreement was discussed at the first biannual monitoring meeting of the new cycle in June 2008 and agreed by officials over that summer. This was subsequently agreed by English Heritage Commissioners in September 2008 and progress on Key Performance Indicators was reported at the next biannual meeting. The agreement was amended to include further emerging priorities across Government and agreed again by Commissioners in March 2009. Throughout this period the group of Key Performance Indicators remained constant with that agreed by the Commissioners in September 2008. Ministerial sign-off was then sought and progress was reported again at the biannual meeting of June 2009. It was agreed at that monitoring meeting that, based on current performance and Ministerial priorities, more challenging targets could be set in two of the agreed fields; overall visitor numbers and educational visits; and that a new target for family visits should be set, in line with these priorities and emerging evidence showing their importance to sustained engagement.

² *Note by witness:* Family Visits will be reported on formally for the first time in 2010 as a result of the process outlined in the endnote.

Q26 Mr Curry: What does it mean?

Dr Thurley: What it means is that you need to have some idea what the long-term effects of what you are doing actually are. Obviously any project we do we do an evaluation of but in this particular area of outreach one of the things you want to know is what long-term benefits are being achieved by spending taxpayer's money.

Q27 Mr Curry: How much more sociological jargon are we going to get in this? We have got Outreach. I am used to outreach services for homeless people and that sort of thing. An outreach service to march Muslims from Bradford up to Fountains Abbey is not something I have come across.

Dr Thurley: Of course it is government policy.

Q28 Mr Curry: Yes, I know, that is the problem, that is the entire problem, Dr Thurley. This whole idiotic process is government policy.

Dr Thurley: We are an arms length body, a quango, and our job is to carry out government policy. It is difficult for you to criticise me for doing that.

Q29 Mr Curry: I am not criticising you, I am going to go to Mr Stephens in a minute.

Dr Thurley: I am pleased to hear that. What I would say though is whether you agree with the policy or not I think it is extremely important that we have some idea of what the impact is of what we are doing.

Q30 Mr Curry: That is putting it in English, is it?

Dr Thurley: Yes, it is.

Q31 Mr Curry: The National Audit Office could in future try and put it in English so that people like me can understand what the hell they are talking about.

Mr Prideaux: Thank you for your guidance, Mr Curry.

Q32 Mr Curry: I just wanted to point that out. There is much more in this report. This is a particularly bad report in terms of being incomprehensible, quite frankly, like outreach projects. Mr Stephens, we are in the year 2009, is it really the job of Government to tell people how to use their leisure time? That is what this is. You will be telling me I have to watch *X Factor* next in order to make sure that the socio-economic profile of *X Factor* is representative of the country.

Mr Stephens: I do not think we are in danger of doing that.

Q33 Mr Curry: You certainly would not succeed.

Mr Stephens: As a matter of government policy, Government does attach importance to the historic environment. It is of huge value to the people of this country, it is also an incredibly valuable asset in terms of encouraging tourist visits.

The Committee suspended from 4.50pm to 4.55pm for a division in the House

Q34 Mr Curry: I was questioning why the Government felt it should intervene in the way people lead their lives. Why can people not visit what they want to visit without being told there somehow ought to be more visits?

Mr Stephens: You are absolutely right, this is fundamentally a voluntary activity—

Q35 Mr Curry: Why is Dr Thurley penalised or told off if he does not get his quotas?

Mr Stephens:—nonetheless the Government invests significant money preserving heritage and wants that enjoyed as widely as possible. I should also say that as we have developed the funding agreement regime between one Spending Review and another, we have significantly reduced the number of targets as a specific ministerial decision and in line with wider government policy.

Q36 Mr Curry: I am deeply relieved to see you have not got a target to improve the number of gays who visit these establishments. That would be a new one. If you are at least moving in the right direction, I should think you are winning. Would it not be logical to see how many women are visiting? Perhaps women are being disadvantaged in the availability of their time to visit these monuments?

Mr Stephens: I think you are asking questions fundamentally about government policy.

Q37 Mr Curry: I am. You bet I am. I am very sorry you are the messenger here.

Mr Stephens: It is a matter of ministerial responsibility, my job is to implement.

Q38 Mr Curry: I have a lot of heritage in my constituency, starting with Fountains Abbey and Studley Royal, which knocks any of these into a cocked hat with the possible exception of Stonehenge. Dr Thurley, how do you know how many people of ethnic minority visited Stonehenge? It is in the open air, is it not?

Dr Thurley: We do a survey. Stonehenge is the site of ours which has the largest number of visitors. Every year we do a visitors survey of the 10 biggest sites that we have. It is quite an extensive survey, we ask quite a lot of questions.

Q39 Mr Curry: Who do you ask the questions of?

Dr Thurley: Of the people who visit.

Q40 Mr Curry: How do you ask them the questions? What do you do? Do you stop them as they go in?

Dr Thurley: We employ a firm which is expert in doing these things and they gently and politely ask people for information.

Q41 Mr Curry: What do they do? Do they go there for a certain number of days? Let us take Whitby Abbey, you have to climb about 300 steps to get to the top, it is lovely when you get there, how do they find how many Muslims or disabled people have gone to Whitby Abbey?

Dr Thurley: We cannot find out how many Muslims have gone there but we probably can take a broad view about how many disabled people have.

Q42 Mr Curry: So they ask somebody if they are an ethnic minority, do they? How do they do this?

Dr Thurley: This is a level of detail I am afraid I cannot answer.

Q43 Mr Curry: But, with respect, since your target is specifically these three groups and since specifically you have been told you have out-performed in one area and under-performed in the others, you must know what they are.

Dr Thurley: I must admit I do not know, but can tell you in writing later, exactly how our visitors survey works. We employ a well-known market research company on a substantial contract which does this piece of work for us and gives us statistically valid information upon which we can make decisions and through which we report to the DCMS. Precisely how it works, I do not know. I have seen them with the clipboards but I have never been stopped myself and asked.

Q44 Mr Curry: I really would like to know and I would like to know right down to the detail how many days they go there, how they do it, do they actually stop people as they go through the turnstiles and ask, "By the way, are you an ethnic minority?" I want to know how they do this because if we are using these statistics we have to be sure they are well-founded. Stonehenge is in the open air, Whitby Abbey is in the open air, Clifford's Tower is in the open air, Tintagel Castle, what is left of it, is in the open air—not much as far as castles go but there is a lot of history attached to it—I want to know.³

Dr Thurley: However you look at it, the information we get from our market research is, we believe, as accurate as it can be and is done in a state of the art way.

Q45 Mr Curry: Are you averaging your figures or is your target to try and get all these sites up? There is obviously here a list of your top 10 sites, there are some which you might describe as more popular than others—popular in a sort of socio-economic sense which this Report seems to be written in. You might think Kenwood House would appeal to a different section of the audience, as it were, as Osborne House might from those who are attracted by, I do not know, Housestead's Fort or Whitby Abbey. How do you calibrate it according to destination?

Dr Thurley: You are absolutely right, different types of sites do tend to attract different types of people. Families and lower socio-economic groups are more inclined to go and see a castle or a fort because sometimes they find that managing young children running riot in a country house is quite difficult. You do have different types of people who go and visit different types of sites, that is absolutely correct.

Q46 Mr Curry: What is the optimum number of representatives of these three groups at your sites? What number would you get where you would say, "Wow, we have hit that target, we will concentrate on some other unfortunate group"?

Dr Thurley: We do not set ourselves any target for the numbers of the types of people who come to our sites. However, through the targets with the DCMS, we do look to see if we can encourage an overall increase in the groups that have been defined by the DCMS as priority.

Q47 Mr Curry: In terms of the impact of this, what are you aiming to do? Is this all part of social cohesion? The Americans have not thought it necessary to do this and the French have not felt it necessary to do this. Is this all part of forging a national identity for somebody who might have come here from Armenia or the badlands of Pakistan?

Dr Thurley: The Chairman asked me right at the beginning what our overall objective was as an organisation and our overall objective is to make sure that future generations can enjoy the heritage of this country at least to the degree that we can, in other words that things are preserved and handed on to future generations. That does mean that we need to invest time and effort in encouraging young people, encouraging people whose families might not have taken them to see these places as children, to visit and enjoy them. If we do that what we begin to ensure is that the next generation of people who come along actually appreciate and enjoy and look after heritage for themselves.

Q48 Mr Curry: Let me ask you one more question. I read history so I am rather keen on this. As you say, in my constituency I have got enough heritage to put everybody else to shame, pretty well. You are an expert in the Tudors and Tudor architecture, I am right, am I not? I have watched some of your programmes as a matter of fact, extremely interesting, even though the Tudors were a fairly minor dynasty from a fairly minor country.

Dr Thurley: True.

Mr Curry: They were bailed out by Elizabeth I really, but were followed by the Stuarts who were even worse. When you watched the BBC series *The Tudors*, if you could bring yourself to do that, do you think that was assisting heritage, watching Henry cavort around in designer boxer shorts?

Chairman: I am not sure that is in order. We all know it was a ridiculous programme.

Nigel Griffiths: It is on page seven of your brief.

Chairman: I am not sure Simon Thurley is responsible for things on the BBC.

Q49 Mr Curry: My question is does that sort of thing on the television stimulate an interest in heritage?

Mr Stephens: Yes.

Q50 Mr Curry: After having watched this *Neighbours* view of the Tudors—I mean if Anne of Cleves had been as pretty as she was portrayed there Henry would not have kicked her out, would he, no

³ Ev 15

sane man would have done that—does it have an impact on people’s perception of heritage? Does this grotesque distortion of British history have an impact, positive, negative?

Dr Thurley: I must confess that—

Q51 Mr Curry: You did not watch it?

Dr Thurley: —I did take the view that it was rubbish so I did not watch it.

Q52 Mr Curry: It might be a target to make you watch it, if you are not careful!

Dr Thurley: It is possible. However, what I would say is that heritage on television and history on television is not only extremely popular but directly stimulates visits to—

Mr Curry: The best watch for a long time was *John Adams* on BBC4. It was outstandingly the best historical drama there has been for years and years.

Chairman: Mr Griffiths, over to you now.

Nigel Griffiths: If I might say Dan Brown’s book, bad though it is, stimulated great interest in Rosslyn Chapel.

Mr Curry: At least it was not a Second World War reprise, like most of the things we watch nowadays.

Q53 Nigel Griffiths: Dr Thurley and Mr Stephens, I see a strong case for investing in heritage as well as making access as widely available as possible because it is, sadly, a minority participatory interest but we require all taxpayers to contribute to it and, therefore, the wider we can engage people the more, hopefully, they will not resent their taxes going to it. Second, and for me even more important, is the enjoyment that people get from it when they discover it.

Mr Stephens: Can I clarify one point because it is not actually a minority interest, something like 70%, our survey suggests, participate,⁴ that means visit two or more properties in a year and that is higher than, for example, go to the cinema. I think I am supporting your case.

Q54 Nigel Griffiths: I am delighted to hear it and perhaps I should declare an interest as a member of the National Trust for Scotland. Box 2, the case study, must give you a great deal of satisfaction when a teacher says “probably the best school trip ever in 12 years of teaching”. Do you get a lot of that in terms of feedback?

Dr Thurley: We do and all our educational activities are not only extremely popular but recognised as such. In the last three years we have won 18 awards for our educational activities so, yes, it is well recognised.

Q55 Nigel Griffiths: The table on page 10 which seems to show a moderate decline—in fact 100,000 decline—in the number of free educational visits, how much of that is the responsibility of you, how much of it is of schools and parsimonious councils redirecting the resources and not giving funding for that sort of trip?

Dr Thurley: It is very sad, but over the last seven or eight years there has been a marked decline in school visits to all heritage sites, not just English Heritage sites. There are a number of reasons for it but most of the reasons are to do with the difficulties about taking children out of school to see heritage sites. There are concerns about health and safety and concerns about the cost of hiring a coach, there are concerns about finding necessary cover when the teacher leaves the classroom and takes a bunch of schoolchildren out for a day, and all those sorts of difficulties actually make teachers reluctant very often to visit heritage sites. It is quite often easier for them to see things that are in town. If they are a city centre school, they can go to a museum. It is much easier doing that than getting on a coach and going out to Fountains Abbey, for instance, which is expensive and involves them filling in risk assessments.

Q56 Nigel Griffiths: Are the targets realistic then?

Dr Thurley: I think our initial target which was set for us at the beginning of this period was not realistic and I do not think we fully appreciated when the 650,000 target was set just how difficult that was going to be to fulfil. As you see we failed to meet that target and the reasons for it I have explained.

Q57 Nigel Griffiths: The actual drop-off, is it more difficult in terms of funding health and safety, et cetera, now as against 2003–04, your perception of that?

Dr Thurley: No, I think it is as difficult in many ways but I think that what we are clearer about now is what the problems are in attracting school visits and we are in a much better position now to devise strategies which will overcome some of those concerns. For instance, we can make, as it were, ready-made risk assessments for schools, they do not have to do complicated work before they can see the site. We can go into the schools and explain to teachers what it is they see when they get to the site and provide them with materials. For that reason in our new funding agreement we have agreed a percentage figure of increase for school visits which we think is more realistic than what was agreed five years ago.

Q58 Nigel Griffiths: The NAO Report says that the cost to English Heritage of a visitor as a school visitor is £9 a visitor. Is this every visitor, including staff time?

Dr Thurley: No, that figure refers to the school visits that come on what we call Discovery Visits where we give particularly intensive treatment and provide a member of staff who sits down with the children and helps them through. That is the most expensive part

⁴ *Note by witness:* “over 70%” relates to adults visiting at least one historic site as measured in 2007–08. The measure for “at least two visits” was introduced for PSA 21 in 2008–09 and the figure was 56.9%. The criteria for participation in PSA 3 was one or more visit to an historic site in the last 12 months, with the figure for those participation in 2007–08 being 71.1%. PSA 21 uses two or more visits to an historic site in the last 12 months as the criteria for participation. Using this criteria 56.9% of the population took part in 2008–09.

of what we do and we do think we should try and get that cost down. We have our own target of reducing it down to about £6.

Q59 Nigel Griffiths: Do you intend to continue with it?

Dr Thurley: We intend to continue with Discovery Visits, yes, we think they are very effective.

Q60 Nigel Griffiths: I think there is some doubt about the actual public reporting of the number of free educational visits to sites in relation to 3.13. Am I reading too much into this?

Dr Thurley: I suppose what that is talking about is not only including people who come to our sites, not only school children but people who are coming through from university, the third age, other types of learners, so that is not just school visits, that is a wider definition of people having an educational experience at our sites.

Q61 Nigel Griffiths: Are you getting any dedicated support from the Department? Is the Department giving any dedicated support to increasing the number of free visits?

Dr Thurley: What the Department does do is it encourages us to work with other NDPBs in DCMS to provide information to schools and other people who might want to use our educational facilities. The DCMS has been encouraging us to work together on a website and other activities. It has played quite an active role in trying to get its various bodies who work in the heritage sector to work together.

Q62 Nigel Griffiths: I am a great believer in learning from others and your Department is a repository of some great examples of this. I think of the Royal Opera House, the Royal Ballet and their outreach work to schools and those who have never been to ballet in their lives or to opera. Are you able to have your officials draw on that and share it with other organisations, like National Heritage? Have you done it to date? If not, would you consider doing it?

Mr Stephens: Yes, absolutely. I cannot think of a specific example of bringing together the Royal Opera House and English Heritage but we do bring together a range of our organisations who are all involved in widening participation, widening opportunity, to learn lessons across the board about how to widen participation, be it in art, be it in heritage, be it in libraries, be it in sport.

Q63 Nigel Griffiths: Which example would you give the Committee which you think is a pretty good one?

Mr Stephens: I think there are lots of lessons across widening arts and widening the heritage environment. Both in particular involve the crucial importance of reaching young people. The evidence strongly suggests that it is very important in terms of adult participation whether people participated as a child and one of the specific areas in which we are bringing those two together is in a number of pilot

projects that are going on under the banner of Find Your Talent which seeks to build up within specific areas an offer to children of five hours a week participation in culture, broadly defined, including heritage, museums, et cetera. That requires all these various organisations in a locality to work together and that is one of the things where learning is being transferred from one organisation to another.

Q64 Keith Hill: I want to say at the beginning that I am a pretty good fan of English Heritage and, if I may say, I particularly appreciated the At Risk Register that was circulated to members in the early summer which has led me at least to initiate what I hope is some useful work with the Streatham Society and Lambeth Council on the St Michael Convent site in my constituency. I want to begin with Mr Stephens and the PSA, Public Service Agreement, where the objective in this area of under-represented groups was to increase participation by 3% and actually you are broadly on target with BME (Black and minority ethnic) groups, you are one point off on people from lower socio-economic groups although there was no movement on people with disabilities. How did you arrive at the 3% target for the PSA?

Mr Stephens: It was set on the basis of discussion between the Department, the Treasury—as part of the 2004 Spending Review—and our various NDPBs. It was set at a level which would be statistically significant, much smaller than that and it would have been hard to measure its impact across the sector as a whole and it was also set at a level which represented a degree of challenge and aspiration because that was what ministers wanted.

Q65 Keith Hill: 3% because you can measure it and any variation would be statistically significant?

Mr Stephens: Yes.

Q66 Keith Hill: But, other than that, no particular reason why it should be 3%?

Mr Stephens: Well, we knew it was a challenging target. It was a challenging target and we thought that represented a degree of challenge.

Q67 Keith Hill: Why did you decide that it should be the same for each of these groups?

Mr Stephens: Again, those were set on the same sort of basis that I have described before. I do not want to suggest that there was a huge amount of underpinning science to this. This represented what was a clear government ministerial priority. It represented what could be measured. It is quite important to recognise that this is only a part of what we want to achieve with heritage. Visits are important, but people engage with heritage in a wide range of ways, not just when they visit, arguably when they walk through a historic town centre they are engaging there. It is very hard to capture that but this represented a good proxy, a good indicator of intent and aspiration and I would not want to claim anything other than that.

Q68 Keith Hill: In setting the target what you are saying is that you did not do any particular research into the challenges or the opportunities for each of these groups, or the potential for movement for that matter?

Mr Stephens: I have to say I am not confident in knowing whether that particular research was done before the target was set. I do know that there is significant research into some of the obstacles and barriers and one of the things our own Taking Part survey has done is to provide some very useful information on why people do not participate in particular sectors.

Q69 Keith Hill: Let me turn now to Dr Thurley. Did English Heritage carry out any research into the techniques you would need to use to attract these particular groups?

Dr Thurley: It was all quite experimental because no-one had tried to do it quite like this before. It was very much trial and error. For each of the years since we have been undertaking this activity we have been doing between 75 and 85 projects, so quite a large number of projects, and, as we said, in the early years they were probably a bit more experimental but as we have built up a bank of, as it were, case experience and knowledge we have got a much better appreciation of what sorts of projects are successful, what sorts of projects are likely to be sustainable and which projects give volume. One of the issues was managing to hit the targets so we needed to involve reasonably large numbers of people.

Q70 Keith Hill: What would be an example of one of these initial experimental schemes which would attract disabled people, for example?

Dr Thurley: We did one at one of our own sites at Witley Court in the West of England where we worked with different groups of disabled, including blind people and wheelchair users and asked them, "What improvements we could make to make the site more accessible to them?" and we got very good feedback from them, and with them we developed staff training, new interpretation leaflets and better signage around the site which actually took account of the way they wanted the site to be explained.

Q71 Keith Hill: Do you seek to communicate this to blind people in general through your communications?

Dr Thurley: Sure. A very, very important part of what we do in this area is recognising that we can only make a very limited impact. 75 to 85 projects reaching 41,000 or 42,000 people is a very small number in the population as a whole and a very small proportion of the total number of people in priority groups. We do very much regard our projects as exemplars, which is why we put great store by running conferences, events and training seminars so that what we have learnt at projects like the one at Witley Court and elsewhere can be disseminated and other people can learn from them.

Q72 Keith Hill: Have you concluded that you need to use different techniques to attract different groups of people?

Dr Thurley: The short answer to that is probably yes, you do. The reason at the moment why it is done on such a small scale is because we really have to work with very small numbers of the people we are trying to work with quite intensively for quite a long time to get them to respond, as it were, to heritage.

Q73 Keith Hill: How do you propose in the future to expand the attractiveness of English Heritage to groups such as these?

Dr Thurley: One of the things we will do over the next five years is to slightly shift some of the work we are doing on this outreach front to work more intensively over a longer period in towns and cities and the countryside rather than just going in and doing one project. Some of the projects we have done have a long afterlife. A very nice example is a project we did in Millom in Cumbria where one piece of work—a photography and creative writing project with a group of residents led to a group being formed who wanted to share and celebrate their heritage for Heritage Open Days. In the first year, 2004, they put four events on and by last year, they were organising a festival of 50 events and have mentored four other villages to put on Heritage Open Days events themselves, so people are getting really enthusiastic about being involved.

Q74 Keith Hill: That is very good. I am sorry to cut you short on this. In order to expand the appeal to these groups, do you need extra resource and is there any possibility with your new funding arrangements, concluded on Friday, that you will get this extra resource?

Dr Thurley: Obviously resource is part of it. Also part of it is forming the right sorts of partnerships and finding the right sorts of people to work with. That is one of the things we have learnt over the last five years, that it will be more effective if we find the right partners.

Q75 Keith Hill: Finally, what is the reason that you are on target for the BME groups but you just undershot on lower socio-economic groups and made no progress on disabled groups?

Dr Thurley: That is a very difficult question to answer, I am afraid. You are talking about in the big PSA target?

Q76 Keith Hill: Yes.

Dr Thurley: It is quite hard to point directly to a causal link—unless the Permanent Secretary is going to disagree with me—between what DCMS organisations have been doing and what the Taking Part survey is showing.

Q77 Keith Hill: If you were to accept—I do not know what is in the next PSA target—the objective of expanding participation by these groups, you would not really know how to do it?

Dr Thurley: I think we would have an idea on a small scale and on an exemplar basis of the sorts of projects that are acceptable, that work and actually make a difference. It would be quite hard to draw a direct line between activities that English Heritage did and the PSA target.

Q78 Chairman: If you look at Figure 9, “Visitors to English Heritage sites are not representative of the wider population”, you are way behind on disabled people, are you not?

Dr Thurley: Figure 9 is our workforce.

Q79 Chairman: The workforce, yes.

Dr Thurley: That is true; we are.

Q80 Chairman: There is no particular reason why this should be, is there? Or is there?

Dr Thurley: You are on Figure 8, are you?

Q81 Chairman: I was particularly interested in disabled because that seems to be particularly bad. That is at Figure 9: “Declaring themselves as disabled” has been particularly bad.

Dr Thurley: In terms of employment or at our sites?

Q82 Chairman: Both really.

Dr Thurley: In terms of at our sites, many of our sites are fundamentally unsuited to people with physical disability. We make a big effort to try and make sure that they are as accessible as possible, but walking round the ramparts of Framlingham Castle is impossible if you have any type of physical or mobility difficulty. As I was responding to Mr Hill, you can help people who have other types of disability, and I talked about blind people, but it is hard. That is why that one scores less well, I think.

Chairman: That is a fair answer. That is fine, it is on the record.

Q83 Mr Mitchell: I cannot see why you should impose these three objectives in the Public Service Agreement of 2004, number 3, on English Heritage in the first place. It is straight forward with sport perhaps and music, perhaps ballet not as a participation sport for the disabled but you can perhaps increase participation by these three minority groups. What is the relevance of them and their activity to English Heritage?

Mr Stephens: You are asking me essentially about government policy.

Q84 Mr Mitchell: I am asking you why you did it. It seems daft. You were implementing this policy and imposing it on English Heritage.

Mr Stephens: It is my job to implement policy, it is not my job to decide it. That is decided by ministers.

Q85 Mr Mitchell: David Curry reckons it is very sensible government policy, of course, David has just reminded me, but is it sensible to apply it to all areas of the Department’s activities?

Mr Stephens: In applying it to English Heritage we were consciously asking ourselves how do we achieve this target that has been set by the

Government, by ministers, for the sector as a whole. We were consciously ourselves saying, “Right, we need to bring together the sector to contribute to and achieve this target. English Heritage has an important role. Its role includes, in respect of its own properties and its own visitors to those properties, a role which has seen them achieve an increase in participation by priority groups in visits to their properties but also a role in leadership of the wider sector, such as Dr Thurley has been talking about, in demonstrating how the sector as a whole can engage in this.

Q86 Mr Mitchell: What can you do to increase the visits by black and ethnic groups to Fountains Abbey, Clifford’s Tower, to any of the other things you have got? How can you interest those groups in those monuments?

Dr Thurley: One of the absolute keys to this is what I have said about education. The one thing that we absolutely know from this big survey the DCMS has been doing called Taking Part is that if children have an opportunity to visit heritage sites, ideally with their parents but even at schools, it means they are much more likely to do it as adults. A really crucial part of our strategy is to work with schools which is why all the questions around education are very important.

Q87 Mr Mitchell: I accept that, but what you are saying there is you increase the participation of these minority groups by increasing general participation?

Dr Thurley: Yes.

Q88 Mr Mitchell: Is that how you do it?

Dr Thurley: General participation but also we want to make sure that school children of whatever race, colour, creed, come to our sites.

Q89 Mr Mitchell: That should have been a general target, “we will increase participation—

Dr Thurley: It is.

Q90 Mr Mitchell: “—and involvement and visits” rather than saying “We will increase it by 3% for this group or that group”.

Dr Thurley: It is a general target. In our current funding agreement we have agreed to increase education visits by 3.2% and family visits by 6.3%.

Q91 Mr Mitchell: Good. Splendid. I am all in favour of that. Why did you manage to hit the target with black and ethnic groups and not with the other two groups?

Dr Thurley: I tried to answer that question in a very inadequate way to Mr Hill. Actually it is very difficult to know exactly why that change took place. We do not understand the mechanics.

Q92 Mr Mitchell: I do not think you know even after the focus group. I am not sure how many you have asked from these groups but you did have focus groups. That was focus groups with groups representing these groups, not with the groups themselves.

Dr Thurley: That was the NAO's focus group and I agree with you the significant weakness of those focus groups was they were very limited and were of groups representing people. The work that is done in the much, much more extensive and statistically reliable survey which is Taking Part gives us a great deal of information about why people either do or do not want to go to Fountains Abbey.

Q93 Mr Mitchell: The obvious one for these three groups, as for a lot of other people, is that they are not interested, is it not? They are either not interested and some of them are expensive to get to.

Dr Thurley: I think that is absolutely right, the people are not interested, well why should they? I have absolutely no interest whatsoever in football and the chance of me ever going to a football match is zero.

Mr Mitchell: That is pretty bad news.

Q94 Mr Curry: You had better get him sorted out.

Mr Stephens: He is our heritage expert. There will be other people who will go to football matches.

Mr Mitchell: In this panegyric of government policy David Curry came up with an interesting suggestion to tie it in to television programmes. There is an obsessive interest in *The Tudors*, why do you not use that to promote your Tudor sites?

Q95 Chairman: Do not let us get on *The Tudors* again!

Dr Thurley: The one thing I would say is perhaps slightly different in terms of trying to encourage people to participate in sport and be interested in heritage is actually heritage is the concern of everybody because it is around everybody, it is the streets where people live.

Q96 Mr Mitchell: Do you tie it in with television themes? Since the Chairman does not want us to go on to *The Tudors*, why if *Up Pompeii* comes on, do you not then immediately promote visits to Halsteads and Hadrian's Wall?

Dr Thurley: Television is a very, very important element of what we do.

Q97 Mr Mitchell: Why do you not use it to encourage people to visit these sites?

Dr Thurley: We do and we rarely do a big project without having a television programme made of it in some way. We have just opened a big project at Dover Castle and we have a *Time Team* special that has been filmed of the whole project and that will be broadcast in the next month or so. I am sure it will have a huge effect on visitor numbers at Dover Castle. We always look and see what we can do with television.

Mr Mitchell: Why are there so few of your sites on the map in Humberside?

Chairman: Are you surprised?

Mr Curry: Do you want to know!

Q98 Mr Mitchell: Come on!

Dr Thurley: I could give you quite a long and complicated explanation. English Heritage sites were amassed from the 1880s onwards.

Q99 Mr Mitchell: What are the two sites in Humberside?

Dr Thurley: One of them is Thornton Abbey and the other is St Peter's Barton, it is an Anglo-Saxon Church and one of the greatest Tudor gatehouses. You have presumably visited both?

Q100 Mr Mitchell: Yes, I have.

Dr Thurley: I was just checking. I apologise, Chairman.

Mr Mitchell: You cannot trip me up that way.

Chairman: We do not want you trying to embarrass the Members, thank you!

Q101 Mr Mitchell: I will not say I put on a pair of dark glasses and groped my way around the Abbey.

Dr Thurley: The reason is the sites that English Heritage looks after were assembled over a long period from the 1880s. They were essentially sites that for one reason or another the state felt it had to take into its own care because they were not going to survive otherwise. I do not know what conclusion in particular you can draw from the fact that there are very few in your area but if you look on the map at page six there are very, very few sites in the North West, there is a big gap in the middle of the country, it is very hit and miss.

Q102 Mr Mitchell: Why do you use so few volunteers? I notice you use fewer volunteers than the National Trust for instance, why?

Dr Thurley: We directly ourselves use about 1,000 volunteers, the National Trust, by comparison, uses something like 52,000, a huge number. The National Trust, which of course is an independent charity, uses volunteer labour to open its sites to the public. Ever since English Heritage started opening its sites in the early 1900s—we were not English Heritage we were the Office of Works—when the Office of Works started to open its sites it always used paid employees. We have had a long tradition of using paid employees.

Q103 Mr Mitchell: What do you use volunteers for then?

Dr Thurley: For our educational visits. They are an absolutely crucial part of our educational programme. The Discovery visits that I was describing earlier are mostly run by volunteers. We have one country house that was acquired by us which is entirely manned by volunteers, 70 volunteers there. Working in the gardens we have volunteers. I think most importantly we fund a lot of other projects which involve volunteers, the biggest one of which is heritage open days which every year attracts about 40,000 volunteers.

Q104 Mr Mitchell: Why have you only put about half your properties into heritage open days? You said in effect I think it was because you did not want to lose revenue on the ones you did not own. That seems pretty mean.

Dr Thurley: The real reason is the point about heritage open days, the whole reason behind it, is that it is about opening buildings not normally open to the public.

Q105 Mr Mitchell: Like in London, when you have an open day they open everything.

Dr Thurley: We do that across the country.

Q106 Mr Mitchell: We had folk trooping around Portcullis House and I sat there with my mouth open and they put pennies in and had a jolly good time. It sets a better example if you open them all.

Dr Thurley: It does. Just to give you an example: if you make, let us say, an English Heritage site in a small town free that is normally a site which you charge for, on that heritage open day, which is only one day, the English Heritage site will be competing with all the volunteer sites which are never normally opened by volunteers. Therefore, what you are perhaps doing is sucking visitors away from the volunteer sites that are not normally open to a big, shiny, state-run site that is normally charging. We think in some ways it defeats the purpose of the project.

Q107 Mr Mitchell: I just want to raise one final issue with you which is parochial. You and I clashed when you came to Grimsby to talk about the preservation order on the Ice Factory. I accused you then of being an obstacle to progress in the sense that you put preservation orders on places like the Ice Factory, or like the coastal try-works in Grimsby, they then stultify because nobody can develop them but you do not help them to raise the money or bring a consortium together to actually turn them into some useful preservation site like Salts Mill or Dean Clough or something like that. In effect you have constipated the docks by slapping a preservation order on the Ice Works and you have constipated the coastal site by putting a preservation order on that.

Dr Thurley: As you know, I have visited the Ice Factory.

Q108 Mr Mitchell: And is it not a mess?

Dr Thurley: Which is a magnificent building.

Q109 Mr Mitchell: It is a mess.

Dr Thurley: And unique.

Q110 Mr Mitchell: Yes, but if you are going to list it you have got to have some idea of how it can be preserved and the thing is falling apart. Listing simply means those people who run it, which is ABP in this case, just let it rot.

Dr Thurley: ABP are letting it rot and I have to be very careful how I say this but I think they are neglecting their duties because the Ice Factory is a really—

Q111 Mr Mitchell: They cannot finance their duties.

Dr Thurley:—important part of Grimsby's history. Grimsby is famous the world over for its fish industries and the buildings that are part of that fish industry are part of what gives Grimsby its character. I must say, I do think it is a bit irresponsible of the port not to take greater cognisance of the fact that it is actually the custodian.

Mr Mitchell: It is all right if you picture these great romantic fishermen of Grimsby's history and turn it into some kind of fishing theme park and—

Chairman: You have made your point, we have got that.

Mr Mitchell: Unless you preserve it, it is useless.

Chairman: We cannot have a local discussion, this is about widening participation.

Q112 Geraldine Smith: How do you widen participation in Lancashire, there are no charging properties to go and visit?

Dr Thurley: That is very true, there are not. However, our outreach programme only works for 25% of the time in our properties, the other 75% of the time it works outside our properties. Obviously in an area like Lancashire we would concentrate particularly because we do not have sites there, you are quite right.

Q113 Geraldine Smith: Who decides? You say this heritage has been a collection from the 1880s onwards, but who decides what is heritage? Maybe that is your problem, that you seem very specific. You like castles, stately homes, palaces. There is a lot more to England than that, is there not? What about working class heritage?

Dr Thurley: Absolutely. Morecambe is a very good example of a place where we have been working very closely with the local authority. We are very keen to see the Winter Gardens restored, which is a major issue. Just across the road we have put a significant amount of money into the hotel, which you will know well. We certainly do not regard heritage as just being cathedrals and castles. One of the major activities that we have been involved in since 1970s is industrial heritage, which is very, very important to us, and, if you want to put a class tag on to it, industrial heritage is working class heritage.

Q114 Geraldine Smith: You have just said the magic words, you would like to see the Winter Gardens restored in Morecambe, so I shall change my tone from hereon in! The Winter Gardens in Morecambe had 600 young people in the other week when *Most Haunted* were filming a television show. There is something very magical about that building and the heritage and it can be enjoyed by such a wide range of people. Projects like that are really important. Bearing in mind there is so little activity going on in Lancashire, it would be nice with the Winter Gardens being so close to the Midland Hotel to see them both restored. I am grateful for your comments on that. Going back to the issue of targeting, I think it is really difficult. Your heritage open days are a really good thing to encourage people to go and look

at some of these sites and some of these historic buildings. The barriers are quite often transportation for people to get out to see them, because when you look around it would appear that a lot of these sites are in rural areas and maybe not too easy to get to. Of course, ethnic minorities quite often can be from a lower socio-economic group as well, and if you look in areas of East Lancashire there are a lot of poorer people. They are working long hours, they do not have as much free time to go and enjoy some of these buildings. I would like to hear more about what you are doing with school children because I think that is really important. You can reach such a wide area there if you go through schools and you really can widen participation and make people grow up with a love of history and heritage then.

Dr Thurley: I would like to make quite an important point which is that this NAO Report is on one very small and very focused area of English Heritage activity. We do not believe in any sense that the appreciation of heritage is about going to visit a site. Appreciation of heritage is walking down the street in Morecambe and understanding the heritage around you and those beautiful buildings, like the Midland Hotel, the Winter Gardens, and the whole of that front looking out onto the bay captures the history of that town and everything it has been.

Chairman: That is very poetic but we will take that as read.

Q115 Geraldine Smith: Carry on!

Dr Thurley: My point is that English Heritage's activities are much wider than trying to drive people to a small number of sites. Our mission is to help people appreciate the places where they live, to look after the places where they live, to make the most of the places where they live to improve the quality of life of people. It is a little bit harder for us in some respects if there are not English Heritage sites there but we can do a very great deal through the planning system, through listing, whatever you may think of it, to help people appreciate their heritage regardless of the location of our sites.

Q116 Geraldine Smith: You are quite right when you say it is government policy but I think they have been too prescriptive with people about what they should enjoy or what they should go and see. Basically people will do what they want and what is relevant to them.

Mr Stephens: Absolutely. It is not about being prescriptive, it is about making sure that the opportunity to enjoy heritage is enjoyed by as wide a number of people as possible. We absolutely agree with Dr Thurley's wide view of how people engage with the environment, it is far more than just visiting sites, and English Heritage's activities are far more than that. All the measures, the numbers of targets in this area, have significantly reduced since the 2004 Spending Agreement. We are in tune with a lot of the Committee's comments in that sort of area but, nonetheless, this is public money being spent so it is

important to be able to demonstrate that public money is being of benefit to as wide a range of the taxpayers as possible.

Q117 Geraldine Smith: I am still not clear about achieving the targets because I do not think you were very clear earlier about how you actually measure who is visiting these stately homes, castles or ruins. How do you do that? You cannot say, "What social class do you come from?"

Mr Stephens: There are two things here. There is measuring participation across the heritage sector as a whole, of which English Heritage is a significant but small part, and we do that by the Taking Part survey, which is a new survey established by the Department run to National Statistics standards which interviews something like 12,000 people across the whole range of our sectors, so not just heritage but culture, the arts, museums, galleries, sport, et cetera. That is a foundation stone of evidence for us in understanding who participates, why and how it is changing over time. Then specifically in respect of the funding agreement English Heritage has some specific targets, including their own visitor numbers, which are measured by their visitor surveys which we were talking about earlier.

Q118 Geraldine Smith: It is just through those visitor surveys, that is the only real way?

Mr Stephens: The visitor surveys and the Taking Part survey.

Q119 Geraldine Smith: Because not everyone will complete a visitors survey, will they?

Dr Thurley: Not everyone will but obviously we need to make sure we have got a statistically robust sample and they will continue collecting data until they think their sample is statistically robust. What we do not have is some of the more softer information about people's sense of appreciation of heritage around them, if that is what you are referring to. I think when you are dealing with people going through the door, we do know quite a lot about that.

Geraldine Smith: What I have noticed myself in a change over the years around Lake Windermere and that area is I think you find a lot of people from ethnic minorities now are going much more into the Lake District. I think people's habits change as well. I think sometimes it can be just a bit of encouragement and something like a heritage open day or a freebie once in a while, there is nothing like, whatever ethnic minority, wherever they come from, if you give someone something for free they are more likely to try it and see what it is like. Sometimes the simpler solutions are probably the best. You can over-complicate things and I think sometimes you have to realise that whilst some people are not interested in stately homes and palaces there may be other elements of heritage that would interest them. That is why I think it is so important that old theatres, all sorts of different buildings play a part in our heritage so the maximum number of people can enjoy them from all ethnic groups.

Chairman: There are a couple of supplementaries before we end. Mr Curry wants to return to the charge and Mr Hill.

Q120 Mr Curry: Dr Thurley, I really do want to know, and if you cannot tell us you said you are going to write to us, how do you ask somebody if they are from a lower socio-economic group? When you do these site surveys do you go out and say, "Excuse me, Sir, are you from a lower socio-economic group? What do you do? What car do you drive?" I want to know.

Dr Thurley: I will have to come back to you in writing. It is done through a series of questions.

Mr Curry: As long as I get it.

Q121 Chairman: You can smile, Dr Thurley, enjoy, you do not have to take it too seriously.

Dr Thurley: I take it very seriously because I think it is important we can demonstrate we do it professionally.

Q122 Mr Curry: What is much more important is that we demonstrate that if you are designing policy around information we have to make sure the information is fact, not fiction.

Dr Thurley: Absolutely.

Q123 Mr Curry: Black and ethnic minority people disproportionately come from a lower socio-economic class, right, in Britain? That is a statement. You are not disputing that, are you, you are agreeing?

Dr Thurley: I am not disagreeing or agreeing.

Q124 Mr Curry: If they visit Whitby Abbey do they score twice? I want to know that, please. Do they count against your target for black and ethnic minority and do they score against your target because they come from a lower socio-economic class, could I know that as well please?⁵

Dr Thurley: You can.

Mr Curry: Third question. If you get an overall increase in numbers because of a publicity campaign, for example what used to be the Yorkshire Tourist Board, now called Welcome to Yorkshire I think, has recently introduced some television ads about coming to Yorkshire which include the heritage as part of the advert. If there is a general increase in people coming to Yorkshire because of that and, say, visiting the sites, it is entirely possible that your numbers could go up in a very gratifying way but your target numbers could decline as a percentage, could they not? That would be a perverse effect, would it not?

Q125 Mr Mitchell: Unlikely.

Dr Thurley: It is possible.

Q126 Mr Curry: That would be a very perverse effect, would it not?

Dr Thurley: And it would be a very perverse effect.

Q127 Mr Curry: You should not be said to have failed because of that because you want people through the turnstiles, do you not, especially in the economic climate we are about to embark upon.

Dr Thurley: We definitely want people through the turnstiles but I do not think these things are mutually incompatible, I really do not. Generally speaking, when we experience a large increase in visitors, as we have done this summer at Kenilworth Castle, we opened a garden there, we experienced a 90% increase in visitors, which is huge. I am absolutely certain that will also have included, and we do not know yet because we have not got the research, an increase in these priority groups.

Q128 Mr Curry: Final point, Chairman. To what extent do the visitor numbers and perhaps these groups depend upon the quality of the visitor centre and the facilities there? Fountain's Abbey which is National Trust, it is not yours, has got a really quite comprehensive visitor centre, good eating facilities as well, good restaurant, cafeteria facilities. I imagine Stonehenge is really quite difficult to have a good visitor centre because of the constraints of the site, but to what extent is that a factor and to what extent are you investing in what you might call the collateral attractions in order to bring people to the main attractions? To what extent—I echo what Geraldine Smith said—are you looking at some industrial archaeology because, after all, Martin Randall Tours actually does tours of industrial Yorkshire and Lancashire. Manchester Town Hall is a phenomenal piece of gothic renaissance and if you have read Tristram Hunt's *Building Jerusalem* you have got the whole background of that great non-conformist building spurge of the creative energy that went into the cities in the nineteenth century.

Dr Thurley: The first question is, yes, it makes a huge difference how much we invest in visitor centres, cafes, shops, even lavatories. These things make a very, very big difference. That is why over the last five years we have made significant investment in all of those, more than £30 million has been spent. We are at the tail end of that period of investment now and the last one we are going to be doing is actually at Stonehenge. It makes sites much more attractive, much easier to visit, and is absolutely fundamental to the whole process. On your second question about industrial heritage, industrial heritage is already represented in many sites that English Heritage opens to the public. More importantly than that, we recognise at the moment that industrial heritage is facing particular problems with the recession and we are focusing on trying to rescue, in some cases, preserve certain industrial buildings. We have recently bought the last 19th century silver factory in Birmingham to save it from being disbanded and knocked down. It is a major part of our industrial archaeology.

Q129 Keith Hill: I have a couple of questions for Mr Stephens. At what point between 2005 and 2008 did the Department realise that it was not going to meet

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or was not meeting its target with regard to increasing the participation of people with disabilities?

Mr Stephens: I do not know the precise date. It was dependent upon the results of the Taking Part survey, which are published on an annual basis but are published some 9–12 months after the period to which they relate, so as with a lot of these indicators it is a lagging indicator. It would have been during the period but lagging, as I say.

Q130 Keith Hill: If you received these albeit lagging reports on an annual basis they were presumably from an early point indicating that there was no increasing trajectory in that particular group. Did the Department take any action with regard to English Heritage when it began to be aware of that?

Mr Stephens: These reports would have been the subject of discussion in the working group that brought together all of the heritage sector to seek to achieve the target as a whole. I am sorry, I do not know the answer as to whether specific discussion and action took place on the disability target.

Q131 Keith Hill: I made a mistake earlier because I now understand that from 2008–09 there are no longer any targets with regard to increasing diversity. Why is that?

Mr Stephens: What we do have is a monitor, so we continue to collect the information.

Q132 Keith Hill: But it is not a target?

Mr Stephens: No. In line with government policy we have sought to reduce the numbers of targets. In accordance with directions from our ministers we have sought to focus them on key strategic interventions, so the current target, which is part of Building Cohesive Communities, shared with a number of departments is to increase participation in two or more of our sectors as a whole. We continue with English Heritage, and the English Heritage funding agreement continues to ask for the collection of information on the diversity of its visitors so that we can continue to monitor that, but it is part of the reduction in the number of targets from some 56 or so in the last Spending Review to about 12 now.

Q133 Chairman: Mr Stephens, you said that it was government policy to increase participation, but what exactly is government policy on participation? Is it to increase participation by a particular percentage, by numbers, by a particular priority group?

Mr Stephens: As I say, it is as defined in PSA21 to increase participation in two or more of our sectors by a statistically significant amount.

Q134 Chairman: We have heard that the evidence is very weak. You said, “This is not up to me, this is policy. I don’t take part in policy”, but of course you do, you advise ministers. If a target is unachievable and not based on evidence you have a duty to tell ministers that, do you not?

Mr Stephens: I do not think there is evidence to suggest it is unachievable.

Q135 Chairman: A whole line of Mr Curry’s question is this is not based on evidence anyway.

Mr Stephens: Far from it. The evidence supporting participation, supporting the importance of heritage to people, to the economy, to the visitor economy is very significant. As a matter of fact, we did achieve a significant increase in two out of the three categories in the 2005–08 period and an overall increase in participation as well.

Q136 Chairman: Dr Thurley, everybody else has had their own fad so you will let me have my own fad. As you know I am on the Council of Lincoln Cathedral. You have cut the funding of the cathedral and to some of the finest buildings in the Western World. We spend £600 billion as a Government, why are we not capable of supporting part of our heritage? This is widening participation and you are forcing these cathedrals to charge more to let people in.

Dr Thurley: As you know, over the last 15 years we have given more than £50 million to English cathedrals and as I think you also know we have ceased having a ring-fenced scheme for cathedrals this year. On 1 December we will be announcing the results of a survey that we have undertaken of all English cathedrals to work out which of them have got significant problems and which ones in our reduced circumstances in terms of funding it would be most appropriate for us to help. I think that you will not feel disappointed when you hear what we are going to announce.

Q137 Chairman: That concludes our hearing, gentlemen. If I may briefly sum up: at the same time as the Department was increasing the organisation of English Heritage’s workload it reduced its funding and the latter concentrated obviously on increasing its income from visitors. As a matter of fact one of these targets has been met but it is not quite clear to us why the target has been met. I am particularly worried about the decline in the number of school parties visiting. I think this must be a priority for you because you said repeatedly this afternoon that it is very important people visit these sites when they are at school. I would like you to write to us in six months’ time and tell us what progress you are making on this front. I do not think it is good enough just to say, “I am sorry, it is all very difficult with all the various difficulties that schools have”. I think you need to be much more proactive. Do you want to make a final comment because I think it is very important?

Dr Thurley: Chairman, I am very pleased that is what your conclusion is because I think we have realised that is absolutely a top priority for us and we are in the process of trying to put together a plan to address exactly that issue. I would be delighted to write to you in six months to let you know what we are doing.

Chairman: Thank you very much for a very satisfactory hearing.

Supplementary memorandum from English Heritage

PROMOTING PARTICIPATION WITH THE HISTORIC ENVIRONMENT

At the hearing on 9 November, I undertook to supply details about how English Heritage conducts its annual visitor surveys. I am pleased to enclose that information plus answers to the specific questions members raised:

- how respondents are selected;
- how socio economic groups and cultural background are identified;
- whether respondents are double counted if they fall into more than one priority group;
- how statistics from the survey are applied to the whole visitor population; and
- whether the proportion of people from priority groups could be adversely affected by a significant marketing drive or surge in tourism.

I also undertook to provide the Committee with an update in six months on how English Heritage is addressing the decline in educational visits. Details will be sent in May 2010.

Dr Simon Thurley
Chief Executive
English Heritage

18 November 2009

Annex

QUESTIONS 38–44 AND 120–124 (MR CURRY): DETAILS OF NEW ENGLISH HERITAGE CONDUCTS ITS ANNUAL VISITOR SURVEYS

Introduction

English Heritage has been conducting annual visitor surveys at its properties for over 20 years in order to monitor visitor satisfaction, audience types, perceptions of value for money, marketing effectiveness and, more recently, trends in visits from priority groups.

The data gathered assists us in many ways including setting admission prices for the following season, developing marketing plans for our properties based on the customer knowledge gained through the survey, planning our programme of special events and prompting action where issues with the quality of the visit or service offered by our staff have been highlighted.

There has been consistency in the methodology and properties selected from year to year so that we can monitor long term overall trends across a representative sample of properties.

The visitors surveys are quantitative—they allow us to measure trends across a large and therefore representative sample each year, rather than provide detailed commentary and insights from in-depth interviews. (We do also carry out this kind of research as and when necessary; the visitor survey is just part of a wider market research programme at EH.)

Methodology

In recent years, our visitor surveys have been undertaken by BDRC—an independent market research company that complies with ISO20252, the recognised international quality standard for market research.

Each year, they conduct approximately 150 face-to-face interviews at each of ten of our most popular sites, delivering approximately 1,500 interviews in total. Fieldwork is conducted in August and early September across a mix of weekends and weekdays and all interviews are conducted by trained interviewers employed by BDRC.

Where possible we use the same core properties each year for the survey, which allows us to track trends consistently over the years.

The 2009 survey was conducted at the following EH properties:

- Stonehenge
- Audley End House
- Eltham Palace
- Osborne House
- Dover Castle
- Battle Abbey
- Carisbrooke Castle
- Kenilworth Castle
- Tintagel Castle

— Whitby Abbey.

The questionnaire form used by BDRC interviewers in 2009 is attached.¹

1. *How do interviewers select the people they approach?*

Interviewers on site stand at an agreed point at the exit (ie the point where all or most visitors leave the site). They interview the next available person aged 16 or over who passes an imaginary line at this point. If this person is part of a party, then the adult who is head of the party (ie the person responsible for purchasing the entry tickets) is interviewed.

The sample excludes:

- Those on an organised trip of 11 or more people travelling by eg coach or mini-bus who arrive together.
- Those that are not at the end of their visit to the property.
- Some other restrictions at four properties based on the nature/layout of the property (ref “screener” section at the start of the questionnaire).

The sample includes overseas residents, but only UK residents are asked questions regarding their socio-economic group and cultural background.

2. *What questions enable the interviewers to identify respondents’ socio-economic group?*

The socio-economic group is determined according to the long established “ABC1” NRS social grades². This industry-standard methodology categorises households according to the working status and type of current or previous occupation of the chief income earner in a household. Where no member of the household earns an income then accommodation ownership/rental or age is used to determine the principal member of the household.

Each head of household is asked a short series of questions to establish their working status, job title and role, type and size of employer. The answer to each of these questions is matched to one of a set of categories which BDRC uses to allocate each person to the appropriate socio-economic group. The questions asked are summarised below (see Q21 on the questionnaire for full details):

2.1 Questions regarding working status

- Are you:
 - Paid 30+ hours
 - Paid 8-29 hours
 - Paid Under eight hours
 - Unemployed up to one years
 - Unemployed over one year
 - Not employed/looking after home
 - Never worked
 - Retired
 - Full Time Student

2.2 Questions regarding occupation:

- Industry: What does your organisation do/make?
 - What is your Job Title?
 - What do you do/mainly do in your job—what sort of qualifications/training do you have?
 - IF EMPLOYED: do you supervise the work of other employees.
 - How many people are employed by the organisation?
 - IF SELF EMPLOYED: do you work alone or do you have employees?
 - How many people are employed by your organisation?
-

¹ Not printed here.

² The *NRS social grades* are a system of demographic classification used in the United Kingdom. They were originally developed by the National Readership Survey in order to classify readers, but are now used by many other organisations for wider applications and have become a standard for market research.

The ABC1 system was replaced in the 2001 census by a slightly different methodology known as NS-SEC (National Statistics Socio-economic Classification) which is basically an updated and more detailed system, but based on answers to the same questions.

We are able to track both ABC1 and NS-SEC classifications through the Visitor Survey and are able to supply either as requested.

3. *Are respondents double counted if they fall into more than one priority group?*

The visitor survey results identify separately the proportion of visitors that fall into each of the three priority groups:

- Lower socio-economic groups (ie groups C2, D and E).
- Limiting disability.
- Black/minority/ethnic.

Some visitors will fall into more than one of these categories.

The survey results show a combined figure which identifies the proportion of visitors that fall into any of the three groups. When this combined figure is quoted then there is no “double counting” of individuals.

The survey results are also shown separately for each of the three priority groups. When a separate figure is quoted for any of the three priority groups, it does not exclude individuals who might also appear in the other two groups.

3.1 Questions regarding disability:

- Do you have a long-standing illness, disability or infirmity? By longstanding I mean anything that has troubled you over a long period of time or that is likely to affect you over period of time?
- Does this illness or disability limit your activities in any way?

3.2 Questions regarding cultural background:

- Please look at this card and choose one letter to indicate your cultural background. Please read out the letter that applies:

A	WHITE	British
B		Irish
C		Any other white background
D	MIXED	White and Black Caribbean
E		White and Black African
F		White and Asian
G		Any other mixed
H	ASIAN OR ASIAN BRITISH	Indian
I		Pakistani
J		Bangladeshi
K		Any other Asian background
L	BLACK OR BLACK	Caribbean
M		African
N		Any other black background
O	CHINESE OR OTHER ETHNIC GROUP	Chinese
P		Other (<i>Please specify</i>)

4. *Are the statistics on priority groups averaged across the whole of the EH visitor population and are any filters applied to account for variations in local population? If not, why not?*

The statistics for priority groups are averages from the total survey, with a weighting applied to reflect the differences in the total overall visitor footfall between different properties as measured through our tills.

We do have many properties in many different locations but our top sites dominate our visitor numbers. These 10 properties represent 46% of our total annual visitors in 2008–09 measured across 112 staffed properties (or 2.13 million visitors out of a total of 4.68 million). This gives an accurate sample of our visitors, and as such is also representative of the local catchment areas to our sites overall. We are confident we have an appropriate balance between coverage and costs, given that extending the survey to more properties would add significantly to the cost of the visitor survey.

Regarding the variations in local populations, it is pertinent that the survey shows many visitors to our properties not visiting from local areas; 65% of visitors in the survey were staying away from home on a holiday or short break.

5. *If visitor numbers went up at a site through increased tourism/marketing, would the percentage from priority groups shadow that increase or might this have a perverse effect on the percentage of priority group members?*

There has been a marked increase in the number of visits to most of our properties in 2009, including the 10 properties covered in the survey, through a combination of increased tourism/marketing. The proportions of visitors in each priority group measured in the survey are very similar to the 2008 data. Therefore the implication is that visits from priority groups have increased at a similar rate to the rest of the market this year.

17 November 2009
