national
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Museums and Tourism
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Tourism is an important part of the UK economy and is the 5th largest industry in the UK[1]. Museums are drivers of British tourism and play a significant role in attracting visitors and in building the British brand. Research shows that cultural activities, including the many free museums and galleries, attract international visitors to the UK and are seen as some of Britain's core strengths[1]. Statistics testify to museums' success in attracting visitors: eight of the top ten UK visitor attractions in 2009 were museums and galleries[2] and three UK museums were in the top five most visited international art museums in 2009[3].

Museums are major beneficiaries of income from visitors, who contribute directly to the tourism economy. Studies calculate that in 2006 overseas visitors to major UK museums and galleries spent £350 million as a result of their visit[4] and UK visitors, who spend considerably less per visit, were estimated to have spent £245 million in 2004[5]. Visitor surveys show that the vast majority of visitors have a positive experience in major museums.

Background: Tourism in the UK

Tourism spending in the UK was worth £90 billion in 2009 – and the sector directly employed 1.4 million people[1]. *The Economic Case for the Visitor Economy*[6] calculates that the total value of tourism in the UK, including indirect benefits from supply chain businesses, was £115 billion – 8.9% of GDP in 2009 – and that it supported 2.64 million jobs. The report forecasts that the visitor economy in the UK could grow to £188 billion by 2020.

In 2009, spending on domestic tourism by UK residents was £70.8 billion. Looking just at overnight domestic trips the largest spend came from visits to large cities and towns, valued at £8.5 billion in 2009, followed by trips to the seaside at £5.3 billion[6]. Over the last decade there has been a trend for shorter trips by UK residents, but overall spend has remained more or less steady. In 2006 86% of trips were day visits, but longer stays were responsible for over 50% of overall spend[7].

The UK as an international destination

In 2009 29.7 million overseas visitors came to Britain: 3.5 million from North America, 21.9 million from Europe and 4.3 million from other countries. Spending by international visitors to Britain totalled £19.1 billion (including fares to UK carriers) and the average spend per visit was £554, with visitors from North America spending £747, Europeans £416 and visitors from the rest of the world £1,112.

The UK ranks 6th internationally in terms of the number of visitors arriving from overseas behind France, USA, Spain, China and Italy and seventh in terms of international tourism receipts[8].

Table 1: International Tourist Arrivals 2009

2009 Rank	Destination	Arrivals (m)	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank
1	France	74.2	1	1	1	1	1	1	1
2	USA	54.9	2	3	3	3	3	3	3
3	Spain	52.2	3	2	2	2	2	2	2
4	China	50.9	4	4	4	4	4	5	5
5	Italy	43.2	5	5	5	5	5	4	4
6	**UK**	**28.0**	**6**	**6**	**6**	**6**	**6**	**6**	**6**
7	Turkey	25.5	8	9	n/a	n/a	n/a	n/a	n/a
8	Germany	24.2	9	7	7	8	9	9	10
9	Malaysia	23.6	n/a	n/a	n/a	n/a	n/a	n/a	n/a
10	Mexico	21.5	10	10	8	7	8	8	8

Table 2: International Tourist Receipts 2009

2009 Rank	Destination	Receipts US$bn	2008 Rank	2007 Rank	2006 Rank	2005 Rank	2004 Rank	2003 Rank	2002 Rank
1	USA	94.2	1	1	1	1	1	1	1
2	Spain	53.2	2	2	2	2	2	2	2
3	France	48.7	3	3	3	3	3	3	3
4	Italy	40.2	4	4	4	4	4	4	4
5	China	39.7	5	5	5	6	7	7	5
6	Germany	34.7	6	7	7	7	6	5	6
7	**UK**	**30.1**	**7**	**6**	**6**	**5**	**5**	**6**	**7**
8	Australia	25.6	8	8	8	10	10	n/a	n/a
9	Turkey	21.3	9	10	9	8	8	9	8
10	Austria	tbc	10	9	10	9	9	8	9

The international tourism market has grown rapidly in recent years, with visits to the UK increasing from 11.6 million in 1982 to 22.7 million in 2009. However, the UK share of total international tourist spend has slipped from 6.5% in 1980 to 3.5% in 2009[9]. The average amount spent by overseas visitors in the UK has declined, as has the average length of visit and the UK is not attracting as strong a share of visitors from new markets as other destinations. To increase its share of the international tourist economy, Britain needs to attract more higher- spending visitors, visitors from emerging markets – such as China, India, Russia and the Middle East, which are growing rapidly – and younger visitors, who will help determine future patterns of tourism.

The UK is well placed to do this, as it is highly ranked as a destination, and culture – and museums – have a part to play. The Anholt-GfK Nation Brands index of 50 countries in 2009 places the UK 4th overall and 5th for its tourism offer[10], and the World Economic Forum Travel and Tourism Competitiveness Index ranks the UK 11th out of 130 countries[11]. Both surveys highlight the high quality of UK cultural resources as a major strength, while perceived weaknesses include value for money and not being welcoming to visitors.

UK expenditure on tourism as a proportion of GDP is low relative to other countries, as is the proportion of the economy dedicated to tourism[6]. Funding available for overseas marketing by UK tourism organisations "pale[s] in significance when compared to competitor destinations" [1], making it difficult to capitalise on UK tourism strengths. For instance, in 2007 VisitBritain's advertising expenditure in the USA was $1.2 million, compared to $8 million spent by Australia and $9.6 million by the Caribbean island Aruba[12].

The 2012 Olympic and Paralympic Games and the Cultural Olympiad, which includes the International Museums Exhibition, offer an opportunity to showcase the UK and its culture to over four billion people worldwide, as well as to those who visit. Securing resources to deliver the tourism legacy benefits of 2012, which are estimated to be worth up to £2.1 billion[13], forms part of the strategy outlined in *Achieving the Full Potential of the Visitor Economy*[1]. The strategy includes addressing issues in tourism infrastructure, such as transforming the 'welcome' the UK offers visitors and updating potential visitors' out of date views of Britain.

The tourism economy will be of increasing importance in difficult economic times. The global recession is likely to impact tourism worldwide, with impact in the UK somewhat mitigated by the weakness of sterling making the UK a better value destination for overseas visitors and UK residents choosing to holiday at home, rather than go abroad. However, as other countries develop their tourist offer and new countries enter the market, competition for international visitors is likely to increase.

Tourism and museums in the UK

Tourism is important to museums and galleries in the UK as a source of visitors and income. Museums also play a significant role in attracting tourists, who generate income in the wider economy.

According to the Association of Leading Visitor Attractions, the top five UK visitor attractions in 2009 (and eight of the top ten) were museums and galleries. All of these offer free entry to their permanent collections:

Table 3: Visits Made in 2008 to Visitor Attractions in Membership with ALVA[2]

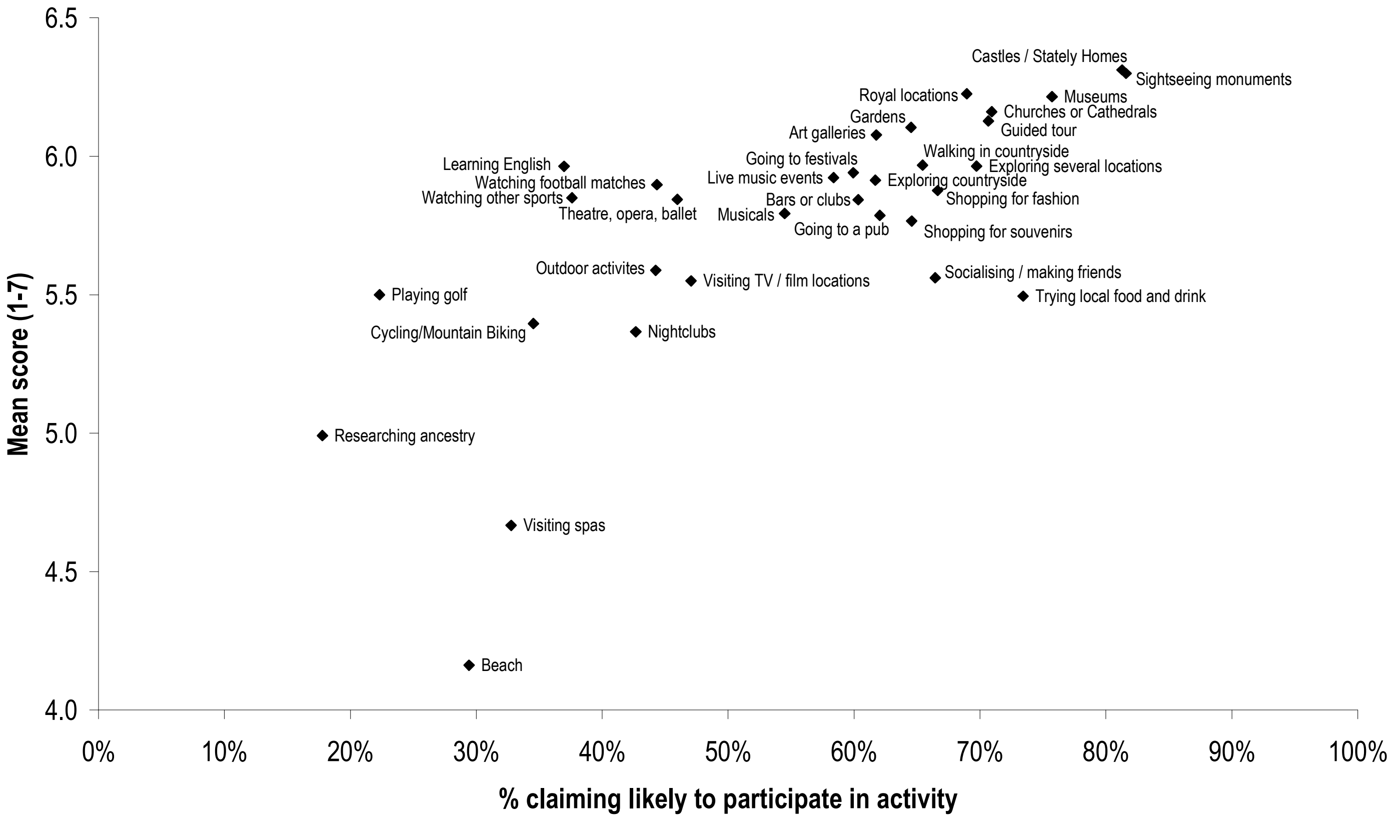
Organisation	Total Visits 2009	Free or Charge	Total Visits 2008	% change since 2008
British Museum	5,569,981	F	5,932,897	-6.1%
The National Gallery	4,780,030	F	4,382,614	+9%
Tate Modern	4,747,537	F	4,862,581	-2%
Natural History Museum	4,105,106	F	3,698,500	+9.8%
Science Museum	2,793,930	F	2,705,677	+3%
Tower of London	2,389,548	C	2,161,095	+11%
National Maritime Museum	2,367,904	F	2,051,270	+15%
Victoria and Albert Museum	2,269,880	F	2,065,300	+10%
National Portrait Gallery	1,961,843	F	1,843,266	+6.4%
St Paul's Cathedral	1,821,321	F/C	1,687,861	+8%

Building the UK brand

Museums play a role in attracting tourists and in building the British brand. Achieving the Full Potential of the Visitor Economy states "World-renowned cultural assets act as a magnet for potential tourists from many parts of the world. Visitors cite Britain's culture and heritage-related assets and activities (including the country's many free museums) as key reasons for coming here."[1]

Research for the Anholt-GfK Nation Brands Index shows that cultural activities, including visiting museums and galleries, attract visitors to the UK and are seen as major strengths for Britain. The chart below shows how likely respondents from 35 nations say they would be to participate in activities in the UK and how highly they rate them, on a scale of 1 "poor" to 7 "excellent". It shows that museums are very highly rated and that people are likely to visit them.

Table 4: Cultural and Heritage Core Tourism Assets[14]



International visitors to museums

Major museums attract a high number of international visitors. In 2008/09 14 million visits were made by visitors from overseas to 17 UK museums, 39% of a total 40.3 million visits. Overseas visitors made up 59% of visitors to the British Museum, 35% of visitors to the National Gallery and 51% of visitors to the National Maritime Museum[15].

Table 5: Overseas Visitors to Major UK Museums 2008-9

Organisation	Overseas visitors 2008-9	% of total visits
British Museum	3,228,234	59%
Imperial War Museum	634,702	32%
National Gallery	1,553,600	35%
National Maritime Museum	1,060,012	51%
National Museums Liverpool	295,888	11%
National Museum of Science & Industry	981,295	23%
National Portrait Gallery	680,000	37%
Natural History Museum	1,264,959	33%
Royal Armouries	101,089	23%
Tate Gallery	2,967,000	40%
Tyne and Wear Museums Service	65,942	4%
Victoria and Albert Museum	817,800	33%

The number of overseas visitors to major museums has increased in the last few years: in 2004-5 the museums received 10.9 million international visitors, 31% of a total 36.1 million visits. There is evidence of a rise in international visitors to museums outside London, with, for example, National Museums Liverpool seeing overseas visitors more than double from 107,631 in 2004-5 to 295,888 in 2008-9[15].

23% of international visitors questioned in 2007 said that they visited museums and art galleries during their stay in the UK[1].

The value of visits to museums

The NMDC *Valuing Museums* report conservatively estimated that overseas visitors to major museums would spend at least £320 million in 2003-04 as a result of their visit to a museum or gallery. UK visitors, who spend significantly less per head, are estimated to have spent £245 million[4]. *Museums & Galleries in Britain: Economic, Social and Creative Impacts* suggests that it would be realistic to assume that by 2006 at least £350 million a year was generated by overseas visitors attracted by major museums and galleries[5].

A 2008 MLA South East study highlights that tourist visitors to museums in the South East spend £224 million in the South East's visitor economy each year[16].

Impact of special exhibitions and events

Exhibitions and special events attract visitors. The Liverpool European Capital of Culture 2008 events programme, which included exhibitions at museums and art events, attracted 5.2 million people to the city. Visits were up 68% on the previous year at Tate Liverpool and up 33% at National Museums Liverpool, which received 2,668,000 visitors, more than in any previous year. Liverpool Capital of Culture 2008 generated an £800 million boost to the regional economy and the city welcomed 3.5 million first time visitors, generating £176 million alone in tourism spend[17].

An Economic Impact Survey carried out by MEW Research into visitors to the Raphael exhibition at the National Gallery in 2004 suggested that for 59% of the 231,000 visitors to the exhibition, which included around 40,000 international visitors, Raphael was the main reason for making their trip to London that day[5].

Competition from international museums

UK museums face competition for visitors from international museums. Figures published in The Art Newspaper show that exhibitions in UK museums attract significant numbers of visitors – although no UK exhibitions appear in the top twenty – and that five of the twenty most visited international museums in 2008 were in the UK[3].

However, over the last four years, daily visits to London's major exhibitions declined in relation to those in Paris, Tokyo, New York and Madrid. This suggests that the UK may be at risk of falling behind as a venue for cultural tourism, as international museums improve facilities to enable them to stage major exhibitions, and international cities compete for visitors.

Quality of visitor experience in museums

The variable quality of visitor experience in Britain has been highlighted as an area for improvement[1], but visitors to national museums have a very positive experience of their visits. Visitor surveys show that an average of 97.5% of visitors to 15 major UK museums and galleries in 2007/8 thought that the museum overall was good or very good[15].

What More Can Museums Do?

Building on the fact that culture, and museums, in the UK attract visitors and are highly rated, developing and promoting museums' offer could help to attract new visitors, encourage them to stay longer and improve their experience while in the UK.

Countering seasonality and shorter visits

As major tourist attractions, museums can help counter the seasonal nature of British tourism, through the timing of programming and exhibitions. A strong museum offer could also be used as a basis for persuading visitors to lengthen their stay, helping to address the decline in economic value per visitor.

Attracting new and diverse audiences

Highlighting museum collections in coordinated marketing and communications could attract visitors from emerging markets and younger tourists, which would help to build future demand for visits to the UK. For instance, by showcasing world class Asian collections in the V&A and the British Museum to potential visitors from emerging economies, or Tate Modern to younger and more diverse audiences, and by highlighting the benefit of free admission to many museums.

Improving 'welcome'

Britain ranks below European competitors in terms of the 'welcome' offered to visitors from overseas**Error! Bookmark not defined.**, whereas museum visitor surveys suggest that international visitors have a positive experience at museums. Museums could therefore be in a good position to offer advice and best practice on improving the quality of visitor 'welcome', for example through staff training.

Developing internet platforms

Major museum websites, themselves a tremendous resource and draw for potential visitors, could be better displayed and sign posted on the VisitBritain and other tourist websites and more prominently included in suggested itineraries.

What More Can Government Do?

In order to ensure that the UK continues to attract visitors and a major share of tourism spend, more needs to be done to consolidate and capitalise on Britain's cultural offer.

Visa costs

Expensive and difficult to obtain visas continue to be a major barrier to international visitors to Britain, particularly for those from emerging economies such as China and India.

Welcome and infrastructure

Developments such as the Trafalgar Square scheme have significantly improved the visitor experience to museums in the area, but the public realms in which many UK museums operate are poor by international standards. Museum transport links, particularly outside London, are often inadequate and expensive.

Involve museums in tourism

To ensure full consideration of museums' offer, potential, knowledge and experience, museums should be included in the development of tourism policy. For instance national museums should be represented on the proposed Tourism Advisory Council.

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