

NMDC response to CMS Select Committee Inquiry into Tourism

This response is submitted on behalf of the National Museum Directors' Council (NMDC). The NMDC represents the leaders of the UK's national collections and major regional museums. Our members are the national and major regional museums in England, Northern Ireland, Scotland and Wales, the British Library, the National Library of Scotland, and the National Archives. While our members are funded by government, the NMDC is an independent, non-governmental organisation. For more information on our activity and a full list of members see our website: www.nationalmuseums.org.uk

Summary

- Museums are a critical part of the UK tourism offer, and visiting museums has never been so popular.
- Museums continue to develop their offer and operation to attract both domestic and overseas tourists. Museums and heritage continue to be primary reasons to visit Britain.
- Museums play a very significant role in the development of the regional tourist industry. They are frequently the most visited attraction in a town, city or region. They are also active in workforce development in this aspect of the tourism sector, including via apprenticeships and the sharing of good practice through local networks.
- Museum partnerships are an excellent and successful way of encouraging regional tourism, as well as building on the success of London. These partnerships have also helped with the regeneration of coastal towns built around culture or heritage.
- However, despite being so integral to the tourist industry, and the fact that supporting tourism is an economic priority for the Government, local authority and central Government investment for museums has substantially reduced since 2010.
- Museums sometimes fit awkwardly within existing structural arrangements. Visit Britain and Visit England could work more strategically with the sector and showcase the breadth of the sector, especially as both agencies' model of supporting offers does not always work for free-to-enter institutions.
- The disparate nature of Destination Management Organisations means that there is a wide diversity of practice and available resources may be spread too thinly or over too small a geographic area. However, joint and regional marketing or branding – as shown with the co-ordinated approach in Yorkshire for the Tour de France – can have a significant impact.
- NMDC welcomes the investment in the GREAT campaign. However, there is no better advertisement for British culture and heritage than the culture and heritage itself. To be successful there needs to be support for cultural and heritage organisations and their activity, as well as for the marketing of those institutions.

1 Museums are an integral part of the tourist economy

1.1 Museums and galleries are the UK's most popular visitor attractions. There are over 50 million visits a year to national museums alone, and visiting a museum has never been so popular: according to the Government's *Taking Part Survey*, 53% of UK adults visited a museum in 2013/14, a significantly higher figure than at any point since the survey began¹. Museums and galleries are driving economic growth and local investment because of their centrality to the tourism industry – they are an all-weather attraction, encourage secondary spending, directly and indirectly create jobs and make an area more desirable for

investment. The sheer breadth and diversity of museums – covering every subject from motor vehicles to historic houses, fine art to fashion, sport to pencils – means there is not a single “museum audience”; they appeal to visitors of all ages, nationalities and interests.

1.2 The UK is home to some of the world's pre-eminent collections and highest profile museums and galleries. They attract an ever-increasing number of international tourists, including visitors from all regions prioritised by the UK Government's GREAT campaign. The British Museum became the second most visited institution in the world in 2013/14, with 6.8 million visitors. The four galleries which make up Tate – Tate Britain, Tate Modern, Tate St. Ives and Tate Liverpool – together welcomed more than seven million visitors in 2013/14. The cultural institutions situated along Exhibition Road in South Kensington (including the Natural History Museum, Science Museum and V&A) receive more visitors per year than the city of Venice.ⁱⁱ 23% of all overseas visitors to London visited the British Museum in 2013, and almost half of all visitors to Edinburgh visit a museum.ⁱⁱⁱ

1.3 Museums and galleries are at the heart of the UK's cultural offer, which is frequently cited as the main reason to visit the UK. Recent research by hpi, commissioned by Visit Britain and the Association of Leading Visitor Attractions (ALVA), illustrates that it is “historic buildings” and “famous places” which prompt overseas visitors to consider a holiday in the UK.^{iv}

1.4 The 2014 British Council/Ipsos MORI report *As Others See Us* explores what people overseas find attractive, and unattractive, about Britain. The research concluded that it is “cultural and historic attractions” which is the most important factor in making a country attractive, and that the characteristic ranked highest in making the UK attractive was also cultural and historic attractions.^v

2 Encouraging domestic and overseas tourists

2.1 Museums are involved in, and instigate, numerous initiatives to attract both domestic and overseas tourists. There are specific initiatives and projects underway to encourage both repeat domestic visitors, and also to encourage long-stay overseas visitors to visit locations beyond Central London.

- Cultural Destinations is a three-year partnership between Arts Council England and Visit England, and involves a number of large regional museum services working in consortia with arts organisations and local tourism bodies. The purpose of the programme is to support arts and cultural organisations to improve their visibility and offer to domestic tourists, strengthen the regional economy through the development of culture-led tourism and embed sustainable ways of working between the public and private sector in those regions. There are consortia in Essex, Lakeland, Bristol, Cornwall, Lincoln, Nottinghamshire and Derbyshire, Sheffield, Liverpool, Calderdale and Kent. Museums and galleries are involved in every consortia.^{vi}
- The British Council, supported by Arts Council England, is working with museums in four areas to look at ways in which they can attract long-stay visitors from the BRIC countries. Four Major Partner Museums (the Horniman Museum and Gardens, Bristol Museums and Galleries, Birmingham Museums Trust and the Manchester Museums Partnership) are working with a smaller museum service in their city or region to devise a specific offer for visitors from Brazil (London, zone 2/3), Russia (Manchester), India (West Midlands) and China (Bristol). Findings from the project and a toolkit for other museums to use will be shared across the museum sector in 2015.
- The larger regional museum services and the national museums are therefore both actively seeking to cater for the growing and changing overseas tourist demand. The British Museum's multimedia guide is now available in ten languages; visiting information on the V&A website is available in eight languages; and the National Gallery provides an audio guide in 11 languages and a printed guidebook in four.

3 Promoting regional tourism

3.1 The strength of museums outside of central London is remarkable, and they are frequently not just the most visited attraction in the area, but the one which provides greatest visitor satisfaction and can be the primary reason for a tourist to visit that area. 17% of visitors to St Ives said that the main reason for their visit to the town was to visit Tate St Ives. Visitors to Tate St Ives generate £8.8m for the local economy in overnight stays and £21.7m in day visits. Similarly, 23% of visitors to Brighton visit the Royal Pavilion and 10% visit Brighton Museum. In 2012, the Royal Pavilion and museums in Brighton and Hove attracted nearly half a million visits from outside the local area, including over 230,000 international visitors.

3.2 Regional museums have won the annual Art Fund Museum of the Year prize for nine of the last twelve years, including in 2014 when the prize was awarded to the Yorkshire Sculpture Park. The 2013 winner, the William Morris Gallery in Walthamstow, was chosen from a 10-strong shortlist which included no national museums. There are 140 Designated Collections across the UK, which are nationally significant collections not based in national collections and cover a huge range of subjects, from the whole collection at the Wordsworth Museum and Dove Cottage in Grasmere, to the core collection at the Porthcurno Telegraph Museum in Cornwall, to the collection of prints, drawings and oil painting by the artist Joseph Wright at Derby Museum.^{vii}

3.3 Popular major temporary exhibitions are not the preserve of London and also provide a reason for visits – day or overnight - to a city or region. *Jack Vettriano: A Retrospective* was the most popular exhibition ever held at Kelvingrove Art Gallery and Museum in Glasgow, seen by over 130,000 visitors in five months. The exhibition was a partnership with Vettriano's studio who helped arrange the loan of a large number of works from private collectors, including Sir Alex Ferguson and Jack Nicholson (as there are no Vettriano works in public collections). The exhibition was also a commercial success for Glasgow Museums, generating an income of £1.82m from retail, of which £682k was from limited edition Vettriano prints.

3.4 Cultural and heritage organisations in a region will collaborate to stage an event or public programming which will act as an incentive to visit multiple sites in a region.

- *Wall Face*, launched in August 2013, is an exhibition project funded by Arts Council England. The project is a partnership between the National Portrait Gallery, Vindolanda Trust, English Heritage, National Trust, Senhouse Museum Trust, Tyne and Wear Archives and Museums, Tullie House Museum and the Hadrian's Wall Trust. Each of eleven museums and galleries along the Hadrian's Wall World Heritage Site display a portrait - either a painting or a high quality facsimile depending on the environmental conditions within each museum/gallery. Two interpretive panels accompany each portrait, one providing an overview, the second providing information about the particular portrait on display. This partnership has brought national loans of objects and engagement not just for large regional services, but to some of the smallest museums who may not normally work in this way. It is their involvement in programmes such as this which contribute to the economic impact Tyne and Wear Archives and Museums has on the local area. BDRC calculates that visitors to the eleven venues managed by Tyne and Wear Archives and Museums spend £60m a year.
- The *Yorkshire Sculpture Triangle* is a multi-functional partnership between Leeds Art Gallery, Henry Moore Institute, Yorkshire Sculpture Park & Hepworth Wakefield. The Partnership has attracted more than £800k of support from various sources for projects including a Thomas Houseago sculpture commission (as part of the Tour de France Cultural Festival) and the loan of a Henry Moore sculpture in the revamped Kings Cross Station in Autumn 2014 to promote the collections. The four galleries between them brought one million visitors to Yorkshire in 2013. In 2014 the partnership will help to boost the region's tourism economy by signposting visitors to the hotels and restaurants within easy reach of the attractions: it is estimated that approximately £21

million will be brought into the region over the next 12 months through the Yorkshire Sculpture Triangle (based on an average spend per visitor of £21).^{viii}

3.5 Some larger museums play a central co-ordinating role in the management of local tourism.

- The Beamish Regional Stakeholder Group comprises of the lead officer for culture and the council leader for all the North East local authorities (as well as experts) and discusses Beamish's role in cultural tourism and business planning (in addition to the museum's role in supporting the local community).
- Ironbridge Gorge Museums Trust chairs the Tourism Advisory Group for the Marches Local Enterprise Partnership. Others work together to improve information and navigation around a city.
- The Whitworth Art Gallery, Manchester Museum and Manchester Art Gallery, along with other museums in Manchester, have joined together to commission Creative Tourist: a year-round, cross art form collaborative marketing initiative designed to raise the profile of culture in Manchester to national and international visitors. Launched in 2009, Creative Tourist is an award-winning online art and travel magazine, app and series of linked seasonal tourism campaigns that "join up" the cultural offer in the city. The model is now being developed commercially in other UK cities, including Belfast.

4 Building on the success of London

4.1 There is little doubt that the London-based national museums play a significant part in maintaining London's position as one of the world's most popular tourist destinations. The national museums are world re-known, with their reputation based on a combination of phenomenal collections, excellent visitor experience, ground-breaking academic research, innovative displays, and extremely popular special exhibitions. 471,000 people saw *Pompeii and Herculaneum* at the British Museum, over 300,000 people saw *David Bowie is...* at the V&A, and 562,600 visited *Henri Matisse: Cut Outs* at Tate Modern. The National Gallery's *Leonard: Painter at the Court of Milan* exhibition (November 2011 – February 2012) attracted a very high proportion of UK tourists: 42% of visits were from beyond London and the South East, and a further 19% were overseas visitors. Because of the demand for tickets (advance tickets sold out on the third day of the exhibition) almost all visits to the exhibition were intentional and booked in advance. The economic benefit to London of all visits to the exhibition was a minimum of £22.8m, almost all of which (£21.8m) is expenditure directly attributable to visiting Central London for the sole purpose of visiting the exhibition. This includes £9.1m spent by overseas visitors. Feedback was extremely positive, with one visitor commenting, "*I will never forget this. This has been a most marvelous experience. Truly wonderful. A once in a lifetime chance. Marvellous*".^{ix}

4.2 However, London-based national museums are acutely aware that they have a national audience, and that they need to serve the audience based beyond reasonable travelling distance of central London. One way of achieving this is to lend objects. Museums loan thousands of objects to other museums across the UK every year as part of mutually beneficial collaborative projects. In 2012/13, DCMS-sponsored museums lent objects to 2727 venues in the UK (a marked increase from 1530 in 2008/09).^x These can be the loan of star objects for a limited period of time, which can have a very positive impact on the local or regional tourist economy. Examples include:

- National Gallery Masterpiece tour (sponsored by Christie's) opened with Manet's *The Execution of Maximillian* at The Beaney in Canterbury. It was seen by nearly 21,000 people before moving on to Barnard Castle and Coventry. Until 2016, one major National Gallery painting will tour each year.

- The famously over-stuffed Horniman Walrus left the museum for the first time in 112 years in 2013 to be part of the Hayward Gallery's *Curiosity* exhibition at the Turner Contemporary in Margate, where he met 136,000 visitors.
- Five collections – Tate, National Galleries of Scotland, National Museum Wales, Salisbury and South Wiltshire Museums, and Colchester and Ipswich Museums – will all display the newly acquired Constable *Salisbury Cathedral from the Meadows* and support the display with a programme of events.
- The National Portrait Gallery has recently acquired a self-portrait of Van Dyke, and after being displayed at the Gallery will embark on a UK tour.

4.3 Regional museums, galleries and historic houses drive local tourism, and their partnerships with national museums assist with this. Some loans are made because they have a particular local significance.

- The Great Bed of Ware, probably the single best-known object in the V&A collections, went on a year-long loan to *Ware Museum* where it was seen by over 34,000 people (almost tripling Ware's normal visitor figures).
- The loan of the Lindisfarne Gospels from the British Library to Durham Cathedral in 2012 generated £8.3m in economic benefit and was visited by 100,000 people^{xi}.
- Other loans link directly to programming in London: to coincide with their 2014 Ming exhibition, the British Museum is touring the largest Ming vase in their collection to The Burrell Collection, Weston Park in Sheffield, Bristol Museum and the Willis Museum in Basingstoke (supported by The Art Fund).

4.4 Some national collections and major partner museums make long-term loans to provide content for a smaller museum or historic house – or to display objects in an appropriate historic context. Again, this helps drive regional tourism as it improves the content and interpretation of the historic house or museum, whilst maintaining the association with the lending collection. Examples include:

- Apart from one locomotive, the entire collection of locomotives and stock on display at STEAM in Swindon is a long-term loan from the National Railway Museum.
- Turton Tower in Lancashire, Cliffe Castle in Keighley and Sizergh Castle near Kendal are just some of the historic houses furnished with objects from the V&A collection. The panelling in the Inlaid Room at Sizergh Castle is now displayed in the room it was originally intended for.
- University of Oxford Museums and Worcestershire County Council worked in partnership with the Keil family and local heritage groups to create a new independent museum, Ashmolean Broadway, in a 17th century coaching house in the Cotswold village of Broadway. All objects on display are from the Ashmolean Museum, including works by Millais and William Morris, as well as objects from Elias Ashmole's 1683 founding bequest to the Ashmolean. There is also a temporary exhibition space.

4.5 Larger museums and specialist collections tour complete exhibitions to venues around the country. The Natural History Museum's *Wildlife Photographer of the Year 2013* has been to ten UK venues including Bristol's MShed, Cumbria's Rheged Centre and Guernsey Museum and Art Gallery. Bristol Museums and Art Gallery regularly host exhibitions which have been first shown at London-based national institutions, such as NHM's *Extinction* and the Royal Collection's *Leonardo da Vinci's Drawings*. The British Museum touring exhibition *Roman Empire: Power and People* was created in partnership with Bristol Museum, and then continued to Norwich Castle and onto Coventry, Leeds, Dundee and Segedunum. The exhibition was responsible for Norwich Castle receiving record visitor numbers on Tuesday 18th February 2014.

5 Reductions in public funding

5.1 The UK's national and large regional museums have been able to maintain a significant contribution to the tourist economy because of public investment and the consequent excellence in display, research, learning, interpretation and collections care, all of which are essential to underpin a high-quality visitor experience. National museums and many larger regional services have worked hard to protect their partnership and exhibitions work from the worst of the cuts they have had to make to date.

5.2 The speed and depth of public funding cuts in recent years, felt most by local authority-supported museums, has an adverse impact on museums' ability to participate in ambitious partnership projects, maintain opening hours, take part in marketing initiatives, mount temporary exhibitions, and retain the collections expertise which underpins the excellent public programming. Cuts inevitably lead to a reduction in the capacity of all partners to manage more complex projects and fundraise for programmes. Much of the activity detailed in this briefing was developed before significant cuts to public funding were made.

5.3 Most museums supported by local authorities have absorbed major cuts to their public funding – of up to 40-50% in some cases – in a period of just 4 years. Cuts of this magnitude make it difficult to plan for the future and to effectively alter operating models to become more entrepreneurial. The National Local Government Network estimates in their report, *On with the Show*, that local authority funding to the arts has reduced by an average of 19% in the past three years.

5.4 NMDC agrees with the conclusions of the *As Others See Us* report that, with regard to tourism (as well as foreign policy and trade), the UK must “know its strengths” and “recognise the international attractiveness of the UK arts and cultural sector in particular” by continuing “to nurture the UK's arts and creative sectors to secure skills, attract international talent and collaboration, and maintain the capacity for excellence in the future.” At a time when the UK Government is seeking to stimulate economic growth through tourism – which is the UK's fifth largest industry – simultaneous and significant funding cuts are being made to the very institutions at the heart of what attracts domestic and international tourists to an area. Although marked reductions in funding have been made to the national collections, the swiftest and largest reductions in public funding have been applied at regional level – and whilst local authorities have largely been supportive of culture and heritage many have little choice but to pass on cuts to non-statutory services.

6 Regenerating seaside towns

6.1 Culture has played a significant role in the regeneration of a number of UK seaside towns. The development of new museum and gallery venues has provided the catalyst for other development in Eastbourne (following the building of the Towner Gallery), Hastings (after the opening of the Jerwood Gallery) and in Blackpool, where the local council is seeking to regenerate by developing a new museum space celebrating the town's history and important position in the entertainment industry (a project in which the V&A is an interested partner). The Turner Contemporary in Margate attracted 450,000 visitors and contributed £3m to the local economy in its first year of opening. It does not have a collection and a substantial proportion of the objects displayed in that time, including Rodin's *The Kiss* and over 80 works by Turner, were lent by Tate. Tate's regional network, Plus Tate, provides a nation-wide infrastructure for joint working between a number of art galleries, many of them based in seaside resorts.

7 Skills

7.1 Museums play an important role in developing a skilled workforce for the domestic tourism industry. For example, Ironbridge Gorge Museums Trust, Birmingham Museums Trust and Culture Coventry are part of the Heart of England Attractions consortium which has secured funding from the Department of Business, Innovation and Skills to develop the tourism

workforce in the West Midlands. This focuses particularly on young people, apprentices and early career development.

8 Structural arrangements and GREAT campaign

8.1 The Cultural Destinations programme – a partnership between Visit England and Arts Council England – is a very welcome, practical and strategic partnership which provides a framework and funding for local tourism bodies and cultural organisations to work together.

8.2 The success of regional tourism initiatives and destination management varies greatly across the country – and museums in many cases proactively take a lead in developing specific projects. The joint approach taken by arts and cultural organisations, other visitor attractions, local authorities, private organisations and tourism bodies in Yorkshire for the celebrations to mark *Le Grand Depart* of the Tour de France demonstrate the impact which joint working and economies of scale can have.

8.3 As national museums and many larger regional museums are free to enter, they do not neatly fit into operating models of Visit England and Visit Britain – many of which are based on special offers for visitors or require publicly-funded bodies to pay for support or marketing. NMDC would welcome a more strategic approach to working with Visit England and Visit Britain, to consider the most effective way of showcasing the depth and breadth of the museum sector.

8.4 There remains some significant bureaucratic challenges to the maintenance of brown tourist signs: these can be a challenge to secure, particularly for a multi-site museum service such as Ironbridge Gorge or Norfolk Museums, and expensive to maintain. Similarly, local authorities may need to re-consider how business rates are applied to independent museums, as this is presently unclear and can result in the museum having a significant, and unexpected, bill.

8.5 Images of museums have been used in the GREAT campaign, and museums have provided content for some GREAT events. This investment in the positive legacy of the London Olympics and Paralympics is welcome. Nevertheless, the most effective advertisement for British culture is the cultural activity itself – support for that activity, as well as for the marketing of the institutions in which it takes place, is vital.

ⁱ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/326325/Taking_Part_2013_14_Quarter_4_Report.pdf

ⁱⁱ <http://www.guardian.co.uk/artanddesign/2011/nov/11/london-exhibition-road-cultural?newsfeed=true>

ⁱⁱⁱ <http://www.ons.gov.uk/ons/rel/ott/travel-trends/2013/rpt-travel-trends--2013.html> and British Museum Key Performance Indicators; National Museums Scotland Economic Impact Study – Executive Summary, Biggar Economics (2010)

^{iv} http://www.visitbritain.org/Images/HPI%20research_tcm29-42431.pdf

^v <http://www.britishcouncil.org/organisation/publications/as-others-see-us>

^{vi} <http://www.artscouncil.org.uk/funding/apply-funding/funding-programmes/cultural-destinations/successful-applicants/>

^{vii} http://www.artscouncil.org.uk/media/uploads/pdf/Designation_List.pdf

^{viii} Figures from Arts Council England

^{ix} 'Once in a lifetime' *An evaluation of Leonardo: Painter at the Court of Milan at the National Gallery*, Morris Hargreaves McIntyre, April 2012. This model is based purely on visitor spend, and no multipliers have been used. Visitors were asked to estimate how much they and their immediate visiting group had spent on subsistence, shopping, transport and accommodation as a result of being in London to see the exhibition.

^x <https://www.gov.uk/government/publications/sponsored-museums-annual-performance-indicators-2012-13>

^{xi} <http://www.visitcountydurham.org/media-room/gospels-impact>