



Mark Jones, Chair

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Tourism Framework Review

I am writing on behalf of the National Museum Directors' Conference (NMDC), which represents the Directors of the UK's leading museums, to signal our interest in and support for the development of tourism policy. The NMDC welcomes Visit Britain's Tourism Framework Review report '*Achieving the full potential of the visitor economy*' and the recognition that the tourist economy is a 'hidden giant' with potential for significant growth.

Tourism is important to museums. Our national museums are both major beneficiaries of income from overseas visitors¹ and drivers of British tourism². Analysis for the Anholt-GMI Brands Index reveals that museums play a significant role in attracting tourists and in building the British brand, as illustrated by the chart on page 30 of your report entitled 'Cultural and heritage are core tourism assets'.

To ensure full consideration of museums' offer, potential, knowledge and experience in the tourism policy making process, we would like to see NMDC members more closely involved and consulted. For instance national museums should be represented on the proposed Tourism Advisory Council.

Specifically, with reference to the report, we would like to raise the following points:

- **Countering Seasonality and Shorter Visits:** The report notes that the seasonal nature of British tourism, driven by the short summer, limits profitability and attractiveness. As major tourist attractions, museums have a particular role to play in countering seasonality through timing of programming and exhibitions. A strong museum offer could also be used as a basis for persuading visitors to lengthen their stay countering the decline in economic value per visitor (p.51).
- **Attracting New Visitors:** NMDC is concerned to note the ageing visitor profile and Britain's failure to attract visitors from emerging markets. The museum offer could be used

¹ For example, in 2007-08, 61% of visitors to the British Museum, 45% visitors to the National Gallery and 40% of visitors to the Natural History Museum were from overseas.

² According to research by the Association of Leading Visitor Attractions, seven out of the top ten leading visitor attractions in the UK are national museums http://alva.org.uk/visitor_statistics/ and Tony Travers (NMDC, 2006) found that visits to Britain's major museums and galleries are 50 percent higher than the annual number of visits to the West End and Broadway theatres combined.

more effectively via Visit Britain marketing initiatives to bring in these people, with for example Tate Modern acting as a strong draw for younger and more diverse audiences and the world-class Asian collections of the V&A and British Museum attracting visitors from that region.

- **Developing internet platforms:** The Visit Britain website provides a valuable source of information to people considering visiting our country. In support of Action Point 3 (p.84) we would like to see NMDC members' websites, themselves a tremendous resource and draw for potential visitors, better displayed and sign posted on your site. We would also welcome more full and prominent inclusion in the suggested itinerary section of the website and clearer indication that our national museums have free admission.
- **Government support:** The report recognises that Government must '*address the opportunities and challenges faced by the industry in a more holistic manner...*' with top-level involvement from beyond DCMS for instance via a Ministerial working group. We fully support the call for cross-government support at a senior level and hope that Gordon Brown's recent speech at the National Tourism Summit in Liverpool (8.01.09) signals renewed interest from the top. In particular we share Visit Britain's concern for the far higher than average taxes paid by our international visitors.
- **Welcome:** You note in your report that Britain ranks well below all its European competitors in terms of the 'welcome' we offer visitors from overseas, whereas our visitor surveys suggest our international visitors have a positive experience on entering our institutions³. Museums are therefore in a good position to offer advice and best practice on improving the quality of visitor 'welcome', for instance via staff training.

I look forward to receiving your response on these issues and your thoughts on how the national museums can best be involved in the development of tourism policy.

³ In 2007/08 39% of the total visits to the V&A were from overseas. Of these visitors 98% of them rated their overall visit as very good/good.