

MUSEUMS AND TOURISM

Museums and galleries are the UK's most popular visitor attractions. There are over 50 million visits a year to national museums alone, and over half of the UK's adult population visited a museum or gallery in 2012. 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 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 those regions prioritised by the UK Government's GREAT campaign. They are at the heart of the UK's cultural offer which is frequently cited as the main reason to visit, and share the breadth and diversity of their remarkable collections with as many people as possible through policies of free entry, loaning objects to other museums across the UK and touring exhibitions to cities across the world. UK museums and galleries are able to do this because of public investment and consequent excellence in research, learning, interpretation and collections care, all of which underpins the high-quality visitor experience.

Tourism is the 5th largest industry in the UK¹. It provides 8.3% of all jobs in Wales², generates £97 billion in England³ and accounts for 4.9% of Northern Ireland's GDP⁴. In Scotland in 2011, 134 million day trips were taken in 2011 during which £6.2 billion was spent⁵.

Tourism is an area of the economy with real potential for growth, through the encouragement of visitors from new international markets and the growing popularity of the "staycation", as well as building on the phenomenal success of the 2012 London Olympic and Paralympic Games and 2012 Festival. The view of the UK abroad has never been so positive and visiting a museum has never been so popular.

51.3% of the adult UK population visited a museum or gallery in 2012. There are now 5 million more visits to museums and galleries since 2005⁶.

Innovative and high-quality displays and exhibitions, fascinating collections and year-round family programmes and special events attract visitors of all ages. Museums are entrepreneurial and collaborative, working together to improve destination marketing and the visitor experience. By sharing collections and expertise, nationally-funded museums help create high-quality exhibitions and attract new audiences to venues from the Shetlands to Truro, County Antrim to Great Yarmouth, and so have an economic impact far beyond the walls of their own institution.

International visits to the UK's leading museums have almost doubled in the past decade. Museums' international touring exhibitions and loans ensure familiarity with those institutions and their collections in both established and growing overseas tourist markets.

Britain's unique culture and heritage attracts £4.5 billion worth of spending by inbound visitors annually, more than ¼ of all spending by international visitors.

UK museums lend high profile objects or complete touring exhibitions to venues in all of VisitBritain's top 20 markets for projected growth (2011–2020).

Our museums and galleries work hard to maintain a world-class visitor offer and continue to attract new visitors, but they need continued support and investment to do so. The Government's policy of free entry to national museums (replicated by many local authorities and independent museums) has been a significant driver in increasing visitor numbers, as have the many partnership arrangements and

loans which enable objects to travel the UK attracting large audiences. UK museums play a key role in driving economic growth through tourism. With continued support and investment our museums can continue to make this vital economic contribution.

Museums are a core asset of the UK tourism economy

The pull of the UK's diverse museums and art galleries helped to secure **£1 billion of inbound visitor spending in 2009**.⁷ Overseas visits to national museums have increased by 95% in the past decade, with **over 19 million overseas** visits in 2011/12.⁸ Museums are a key strength for the UK's international brand and a motivator to visit, and are a popular activity for both domestic and international visitors:⁹

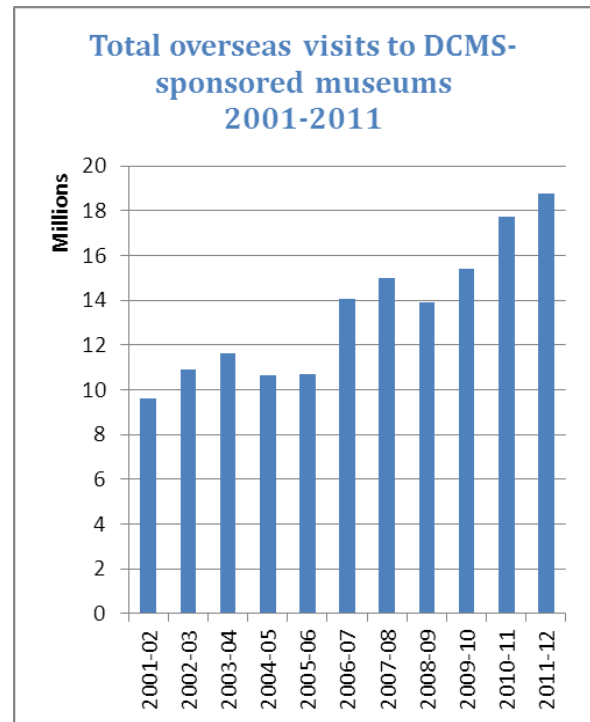
- 48% of international holiday visits within England and 55% in London include a visit to a museum. One in four visit an art gallery;¹⁰
- 28% of all in-bound visitors go to a museum or gallery while they are in the UK;
- People coming to Britain to study are even more likely to include a visit to a museum (69%) and art gallery (39%); and
- Almost 10% of business visitors also visited a museum or gallery.¹¹

Museums' own visitor research reveals that many international visitors go to more than one museum or gallery during their stay. North America and Europe are still the biggest overseas markets but museums are also popular with visitors from newer markets. Nearly two-thirds of visits from both Brazil and Argentina include a trip to a museum.¹²

3 of the world's top 5 art museums are in London¹³

1. Louvre, Paris (8.88m visits)
2. Metropolitan Museum of Art, New York (6m visits)
3. British Museum, London (5.85m visits)
4. National Gallery, London (5.25m visits)
5. Tate Modern, London (4.8m visits)

“Imperial War Museums’ economic impact in terms of tourism is forecast to be £83.6 million per annum in 2012-13.” This is more than four times the amount of DCMS revenue funding they receive.¹⁴



Source: DCMS Sponsored Museums Performance Indicators 2011-12. Figures for 2001-2007 from *Museums and Galleries in Britain: Economic, social and creative impact*, Tony Travers, London School of Economics (2006)

Opening up new markets

The Natural History Museum recorded a 234,000 increase in overseas visits in 2011/12, compared to 2010/11. The museum has seen a significant rise in international visitors over the past 5 years. The largest growth in numbers has come from Europe but it is clear new markets are also opening up. Visitors from Africa, Asia, South and Central America increased from 6% of overseas visits in 2010/11 to 11% in 2011/12.

Marketing to international visitors

Our leading museums work with a wide range of partners to promote visits. For example the British Museum, V&A and National Gallery work with Visit Britain, London & Partners, group travel agencies, Superbreaks and Eurostar to target international and domestic tourists. These campaigns mostly focus on temporary exhibitions. Our museums also work hard to ensure guide books around the world include the most up to date information and images of UK museums. The National Gallery has recently produced Russian and Polish guidebooks and is also trialling an online guide called 'Arrivalguides' which is popular with visitors from Scandinavia.

The UK's rich cultural offer is the major draw for international visitors

"Culture and heritage is the most important part of Britain's tourism offering as at some point it touches every visitors' trip to Britain. Culture is the single most important motivation for city trips"
VisitBritain, 2010¹⁵

The UK has been ranked **3rd in the world for cultural resources** by the World Economic Forum and is the seventh most competitive visitor economy.

The Nation Brand Index demonstrates that heritage and culture are strong motivators to visit a destination and Britain is seen as a world-class destination in terms of its culture. 57% of respondents from 20 countries agreed that history and culture are strong influences on their choice of holiday destination (and only 15% disagreed).¹⁶

Trip Advisor named **London as the World's Best Destination** in May 2012 in its Travellers' Choice Destinations awards based on millions of reviews and opinions from TripAdvisor travellers.¹⁷

The cultural institutions situated on Exhibition Road in South Kensington (including the Natural History Museum, Science Museum and the V&A) receive more visitors per year than the city of Venice.¹⁸

Museum and galleries drive UK domestic tourism

Museums are the most popular visitor attractions for domestic holiday makers within Great Britain.¹⁹

6.1 million UK trips included a visit to at least one museum with a further **2.91 million** including a visit to at least one art gallery.²⁰ Trips including a visit to a museum account for **£1.75bn** of spending by domestic tourists. Trips including a visit to an art gallery account for **£923m** spending.²¹

Almost half of all visitors to Edinburgh include a visit to a museum.²² 12% of British

holiday makers in Scotland visited a museum and gallery. 23% of all visitors to London visit the British Museum and 20% visit the National Gallery²³.

"If we're to boost our ranking as an international tourism destination, and also provide more attractive alternative for British travellers considering whether to holiday in the UK rather than abroad, then we must broaden our offer so that other parts of the country can match London's excellent performance as an internationally attractive "attack brand" destination."

Government Tourism Policy 2011

8 of the top 10 visitor attractions in the UK are museums²⁴

1. British Museum (5.58m)
2. Tate Modern (5.32m)
3. National Gallery (5.16m)
4. Natural History Museum (5.02m)
5. Victoria and Albert Museum (3.23m)
6. Science Museum (2.99m)
7. Tower of London (2.44m)
8. National Portrait Gallery (2.1m)
9. National Museum of Scotland (1.89m)
10. St Paul's Cathedral (1.79m)

4 of the top 5 visitor attractions in Scotland are museums and galleries²⁵

1. National Museum of Scotland, Edinburgh (1.49m visits)
2. Edinburgh Castle (1.3m visits)
3. Riverside Museum, Glasgow (1.07m visits)
4. Kelvingrove Art Gallery and Museum, Glasgow (0.98m visits)
5. Scottish National Gallery, Edinburgh (0.93m visits)

National Museum of Scotland is the UK's most visited attraction outside London

Since reopening in July 2011 the National Museum of Scotland has attracted over 1.8million visitors (exceeding the original target of 1.1million visitors per year within the first four months of reopening) and was the most visited attraction outside of London in 2011. The economic impact of National Museums Scotland is estimated at £58.1m annual additional benefit to the Scottish economy and 2,611 full time equivalent jobs.²⁶

Visitors to cultural attractions spend £1.3bn in Yorkshire

43% of visitors to Yorkshire go to cultural visitor attractions. Based on the proportion of overnight and day visitors within this group, it is estimated that visitors to cultural visitor attractions in Yorkshire spend in the region of £1.3 billion into the local economy in a single year. £572 million of this comes from visitors from outside the region. Museums and galleries deliver the highest visitor satisfaction rates in Yorkshire. In West Yorkshire visitors rate museums and galleries and sculpture as most enjoyable part of their visit (31%) - only scenery scores higher. Yorkshire's visitors to cultural visitor attractions also spend more than the average visitor. Day visitors spend 35% more than the average for day visitors (£26.11 compared to £19.33) and an average 6% more for overnight visitors (£46.58 compared to £43.79).²⁷

Visitors to Tyne & Wear Archives and Museums spend £60m a year

BDRG have calculated that visitors to the eleven venues managed by Tyne and Wear Archives and Museums (TWAM) spend over £60m a year in the region as a result of their visit. Taken together with TWAM's own spending on suppliers and salaries, this implies a total gross economic impact of nearly £70m in the North East.

Royal Pavilion, Libraries & Museums, Brighton & Hove works with VisitBrighton to attract both domestic and overseas visitors. The Royal Pavilion and Brighton Museum & Art Gallery are the second and third most popular attractions in Brighton after the pier. 23% of visitors to Brighton visit the Pavilion and 10% visit the Museum. Last year, the museums attracted nearly half a million visits from outside the local area, including over 230,000 international visitors.²⁸

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 £12.7m in day visits.

A Visit Wales Survey found that nearly one in ten visitors to Wales have made a visit to a museum as their main or principle reason for their trip, and that over a quarter of visitors have visited or plan to visit a museum during their trip. This confirms the importance of museums as a 'must see' attraction. The family market dominates Welsh holidays accounting for 2.2 million trips and a 37% share of the holiday market during 2011. **National Museum Wales** offers a year-round programme of free events for families.

The redevelopment project at **St Fagans: National History Museum** is expected to generate around 180 jobs, generate an additional £500,000 of income per year and create an estimated £5.5 million of additional income for the Cardiff area by 2020/21. Cardiff University's Business School estimated Amgueddfa Cymru's total economic impact at £83m of output.

Manchester Art Gallery attracted almost 110,000 UK day visitors in 2011-12 and more than 25,000 international visitors. Visits to the **Manchester Museum** and **Whitworth Art Gallery** have increased by almost 50% since 2007-8, and tourist numbers have risen at the same rate as local visitors.

Five star visitor status for the National Museum of Flight

National Museums Scotland have invested £2.5m in improvements to the National Museum of Flight. As a result, visitor numbers have increased by 24% and the Museum has been awarded Visit Scotland's prestigious five-star visitor status.

Building our international reputation

Museums' international activity including extensive programmes of touring exhibitions and partnerships, raise the profile not only of individual museums and collections but the UK as a whole. Research by the British Council demonstrates that international cultural relationships build trust in the UK and are associated with increased levels of interest in visiting the UK as a tourist, studying here or doing business with the UK.²⁹

International media profile

Our leading museums work with press agencies around the world to promote their exhibitions. The Natural History Museum's Veolia Environment Wildlife Photographer of the Year Exhibition consistently has a wide international media reach. The 2011/12 campaign attracted approximately 93 articles internationally, in addition to over 200 in the UK. The 2012 exhibition has been featured in press articles in Russia, Brazil, USA, China, India and France. A feature on BBC TV World News was broadcast in South East Asia, India, Pakistan, Europe and North and South America, and an interview with the competition winner, Paul Nicklen on BBC World Service Outlook radio programme reached 145 million listeners across the world, sparking particular interest across North America.

The collection of Impressionist paintings from **Amgueddfa Cymru - National Museum Wales** was seen by audiences across America, thanks to the touring exhibition *Turner to Cézanne: Masterpieces from the Davies Collection* exhibition (2009/10). The exhibition visited five different venues over a period of eighteen months – Columbia Museum of Art, Oklahoma City Museum of Art, Everson Museum of Art in Syracuse, New York, the Corcoran Gallery of Art in Washington DC and Albuquerque Museum in New Mexico. It generated significant media attention.

Leonardo exhibition attracts £22.8m visitor spending

The National Gallery's Leonardo: Painter at the Court of Milan (November 2011-February 2012) attracted a very high proportion of UK tourists: 42% of visits were from beyond London and the Southeast, 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 of these visits 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 seeing the exhibition. This includes £9.1m spent by overseas visitors.³⁰

'I will never forget this. This has been a most marvellous experience. Truly wonderful. A once in a lifetime chance. Marvellous.' (Leonardo exhibition visitor)

A History of the World in 100 Objects raises the profile of the British Museum

The British Museum's collaboration with the BBC on the radio series *A History of the World in 100 Objects* has raised the profile of the museum around the globe. There have been over 30 million international downloads of the programme and the book has been sold in 12 countries including France, Germany, Spain, Russia, China and India. The British Museum estimates that the series brought an additional 266,000 visits to the Museum in 2010.

The British Museum sent 13 exhibitions on tour to 9 countries in 2012 including the USA, China, India and Russia. When the British Museum borrowed high profile objects from Xi'an for the hugely successful *First Emperor* exhibition (2007) and took their touring exhibition *Britain Meets the World* to Beijing in the same year, there was a noticeable increase in visitors to the British Museum from East Asia: there was much greater awareness of the British Museum brand in China.

Enterprising and innovative visitor attractions

The UK's museums provide a world-class and diverse visitor offer and are successful in attracting visitors from across the UK. Museums also work together, sharing collections and expertise to improve their visitor offer and attract new audiences to venues around the country.

Six national museums in London worked together on the **London for Free** campaign, to target a UK audience beyond London and the South East.

The Manchester Partnership's major Cultural Olympiad project in 2012, *We Face Forward: Art and Music from West Africa Today*, involved working closely with tourism agencies, Visit Manchester and VisitEngland, to draw in visitors both nationally and internationally.

Tourists are a priority audience in **Amgueddfa Cymru – National Museums Wales's** audience development action plans and each of the national museum's sites in Wales works closely with local tourism consortia and partnerships.

Take another look at the National Portrait Gallery

The National Portrait Gallery *Take another look* campaign promoted Gallery's permanent collection to potential visitors around the UK. The campaign, which ran across various media, invited the public to take another look at the portraits and sitters featured in the permanent collection and at the Gallery itself. It featured quirky and little-known stories about an eclectic range of personalities, from historical figures to modern icons, with names as diverse as Lord Kitchener and Rio Ferdinand. Following this campaign, there was a 28% increase in UK visitors to National Portrait Gallery during the second half of 2009 compared with a fall of 4.4% in 2009 for domestic visits to the capital in that period.

The success of the 2008/09 **Banksy v Bristol exhibition at Bristol City Museum and Art Gallery** demonstrates that if the product and marketing is targeted well, events like this can draw huge numbers of visitors from beyond the city and from overseas. The exhibition was one of the top 30 most visited art exhibitions in the world that year, attracting an average of 4000 visitors a day and generating £10.4m for the local economy in visitor spend.

Over 308,000 people attended the exhibition. Of these 201,975 came from more than 25 miles away, with 6,482 from overseas. 69.4% of the non-local visitors were motivated to come to Bristol because of the exhibition.³¹

The exhibition **Jack the Ripper and the East End at the Museum of London Docklands** in 2008 led to an increase of both domestic and overseas visits to the museum by 4% between 2007/8 and 2008/9. In addition the opening of the Galleries of Modern London at the Museum of London in May 2010 increased UK and overseas tourists from 192,804 in 2009/10 to 259,197 in 2011/12.

Working together to promote destinations and increase visits around the UK

*"London dominates holiday visits by overseas visitors to an extent not experienced by our European competitors, with over half of tourist nights spent in the capital in 2011. Many visitors are attracted to the countryside and to experiences available outside of London, but are unaware of the opportunities"*³²
VisitBritain

Leeds Museums and Gallery are working with the Henry Moore Institute, Yorkshire Sculpture Park and The Hepworth Wakefield together with Leeds and Wakefield Councils, Arts Council England and Welcome to Yorkshire on a tourism initiative promoting sculpture within the region, and raising the profile of cultural attractions.

Creative Tourist

The Whitworth, The Manchester Museum and Manchester Art Gallery, along with other museums in the city have joined together to commission Creative Tourist: a year-round, cross-artform 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 and series of linked seasonal tourism campaigns that 'joined up' the cultural offer in the city, and worked with partners across the sector, as well as with tourism agency, Visit Manchester, and local hospitality, retail and transport providers. Creative Tourist has also produced a free iPhone app providing visitors with a mix of historical and visitor information, as well as up-to-the-minute exhibition and cultural event listings for both visitors to Manchester and locals.

Leading local tourism businesses

Following the Coalition Government's creation of Local Enterprise Partnerships (LEPs), the Ironbridge Gorge Museum Trust was asked to chair the Tourism Advisory Group for the Marches LEP, representing the tourism businesses of Shropshire, Herefordshire, and Telford and Wrekin. In late 2010, Ironbridge hosted a Tourism Summit to establish local tourism priorities to inform the *Marches LEP Tourism Development Plan* (presented to the LEP Board in October 2011). The CEO of the Ironbridge Gorge Museum Trust also represents the tourism sector on the Marches LEP Redundant Buildings Grant (RGB) programme board - a funding scheme which supports the development of redundant property across the Marches area as part of projects which help stimulate the local economy and create new jobs.

Leading partnerships to improve the visitor offer

National and large UK museums not only drive tourism to their own sites, but their loans programmes help drive tourism to partner galleries and regional museums around the country.

Sharing collections and expertise

Plus Tate is a network of UK galleries which work with Tate, some of which do not have their own collections. One such gallery is the new Turner Contemporary in Margate. The Turner Contemporary is acknowledged as being central to the redevelopment of Margate as a domestic tourist destination. The Turner Contemporary attracted 450,000 visitors and contributed £3m to the local economy in its first year of opening. Tate has lent works to the gallery for every exhibition it has mounted since it opened in April 2011, including Rodin's *The Kiss* and over 80 works by JMW Turner.

Working together to secure investment in training

The Heart of England Attractions is a consortium of 15 principal attractions from across the West Midlands including Ironbridge Gorge Museums Trust, Birmingham Museums Trust, Alton Towers, Drayton Manor Theme Park, Warwick Castle and Coventry Transport Museum. By working together the Heart of England Attractions have secured funding from the Department for Business, Innovation & Skills (BIS) as part of the Employer Opportunity Fund Pilot. They are the only tourism sector consortium to receive this funding. The award will help to develop the tourism workforce of the West Midlands with a strong focus on young people, apprentices and early career development for those staff who show promise.

Tourism – a key area of economic growth

“This Government recognises that tourism is a cornerstone of growth. Currently our fifth biggest industry, many think it could be our fastest growing sector over the next decade.”

Maria Miller, Secretary of State for Culture, Media and Sport, November 2012

Tourism is Britain's 5th largest industry, our 3rd largest export earner and worth £115.4bn to the UK economy.³³

The UK welcomes **31 million visitors** from across the world, who spent £18bn last year.³⁴

Inbound tourism generates around **£3.2bn of government tax revenues** annually and is the UK's third largest earner of foreign exchange³⁵

Residents of Great Britain took **1.5bn tourism day trips** in the UK in 2011, spending around £52bn. GB residents also made **126.6 million overnight domestic tourism trips in 2011, spending £22.7bn.**³⁶

Tourism employs 2.6 million people and supports over 200,000 small and medium-sized enterprises:

- One in twelve jobs in the UK is currently either directly or indirectly supported by tourism.
- Tourism is a major employer of young people: 27% of those employed in tourism are under 25.³⁷

Tourism is a growth industry:

- Spend by tourists has grown faster than GDP since 2010 – at 3% per annum.
- UK domestic overnight trips have increased by 9.4% in 2010-2011 and spending increased by 14.5%.³⁸
- Tourism expenditure is forecast to continue to grow at an annual real growth rate of 3.0% per annum over the period 2010 to 2020.³⁹

“Tourism is worth £11bn to Scotland, employs 270,000 people and is one of the industries bucking the economic downturn - with visitor figures increasing by 9% last year.”

Alex Salmond, First Minister, Scotland, June 2012.

Global competition for tourism

We cannot afford to be complacent: Britain is in danger of falling behind competitor markets. The growth in global travel over the last two decades means that Britain is competing against more destinations, for a larger number of potential visitors. Investment and support for our tourism economy is more important than ever.

- Visits to the UK from the USA have fallen 27% since 2006, while outbound travel from the USA generally has increased by 3%.
- Chinese citizens' outbound travel spend has increased by 400% in the past decade but France and Germany receive many more Chinese visitors than the UK, largely for visa reasons.⁴⁰
- VisitBritain is spending £1 million in 2012/13 on marketing activity in China, Tourism Australia is investing over AUS\$20 million (£13 million at current exchange rates).⁴¹

European competitors actively promote culture and heritage in their tourism marketing and PR. *Arts & Culture* is one of the areas highlighted prominently by Atout France, the French tourist development agency. The German National Tourist Board focuses its marketing around annual themes and will promote culture with a campaign on World Heritage Sites in 2014. In August 2012, the Vienna tourism board featured large images of the city's Kunsthistorisches Museum as backdrop images for two indoor 'parks' in two Saudi Arabian shopping centres.

Government Funding of Tourism			
	2001	2011	% change
UK	£48.0m	£35.9m	-25%
Australia	A\$90.0	A\$141.5	+57%
Ireland	€56.3m	€151m	+168%
France	€23.0m	€39.5m	+72%
Spain	€67.2m	€85.0m	+26%
Germany	€30.4m	€27.4m	-10%

Source: UK Tourism Statistics 2012, Tourism Alliance

Tourism can be a lasting Olympic legacy and drive economic growth

Tourism should be a major legacy of London 2012 Olympic and Paralympic Games. The Olympics was a great opportunity to show the world the best we had to offer. Museums played a leading role in the Cultural Olympiad and London 2012 Festival in both headline events and community programmes, making the Games a unique nationwide celebration.

The Government aims to attract 4 million additional visitors by 2015 on the back of the Olympics and Jubilee.⁴² Looking further beyond, VisitBritain aims to attract 40 million visitors and earn £31.5 billion from international tourism a year by 2020. The UK's leading museums will play a pivotal role in attracting visitors and sustaining high-levels of visitor satisfaction.

Museums are well placed to respond to the strengths and address weaknesses VisitBritain has identified for the UK's 22 key markets:⁴³

Appealing to emerging markets: Culture will be particularly important in attracting visitors from Russia and Brazil. Targeting the youth sector with a vibrant city life offer will be a key feature in the UK's efforts to attract visitors from Brazil. Our museums and galleries are well placed to contribute to this, since they are at the heart of vibrant city life around the UK.

Family friendly venues: Britain is not perceived to be a family-friendly destination by several of VisitBritain's 22 key markets. The UK's museums are a key asset in promoting family-friendly holidays in Britain. Our museums offer an exciting year-round programme of events and activities for children. Over 300 museums have signed up to the Kids in Museums Manifesto.

Value for money: Value for money is a key motivator for tourism decisions and the UK is frequently rated below other nations in terms of value. Our many free museums are one of the UK's great strengths in terms of value, and attract visitors who spend in other ways. The 95% increase in

international visits to national museums since the introduction to free admission, fuelling ever greater visitor spend, is testament to this.

All weather and all-year attractions:

Museums and galleries are the ultimate "all-weather products" providing visitors with shelter on rainy days and a cool place to explore on hot summer days. With a constantly changing programme of exhibitions and events, our leading museums and galleries have no "off" season. There are over 100 temporary exhibitions and displays open at any one time at the UK's leading museums and galleries.

High visitor satisfaction: Our museums record a very high visitor satisfaction with an average of 96% of visitors willing to recommend a visit. 100% of visitors to the Royal Armouries would recommend a visit.⁴⁴ As both innovative cultural venues and entrepreneurial visitor attractions, our museums can help drive economic growth. Efficient and well-run charitable organisations, our museums are striving to respond to current challenges to maintain a world-class visitor offer and continue to attract new visitors.

Don't just take our word for it. There are thousands of positive reviews on Trip Advisor:

The Wallace Collection was an extraordinary surprise for me. I just loved my day spent there. galutengirl, Los Angeles

RAF Museum: The exhibits are fantastic, and the interactive information points are brilliant... the staff couldn't be more helpful and have a depth of knowledge that just cannot be written down. MontyMullan, Ireland

Bristol Museum and Art Gallery: What I love about this museum is the idea of having so many things in one place. Black B, Bath

Ulster Museum: Great day out... absolutely no negatives at all, and for someone as difficult as me to please, that's about as good as it gets. cfcway, Warwick

Everyone from little tots to Grandad will love the National Railway Museum... best of all it's free! Sally G, Guildford

¹ VisitBritain, 'Achieving the Full Potential of the Visitor Economy', (February 2009) p.6

² Wales Tourism Satellite Account

³ VisitEngland

⁴ *Role of Tourism as an Economic Driver*, Northern Ireland Tourist Board

⁵ *Scotland: The Key Facts on Tourism 2011*,

⁶ DCMS, *Taking Part Survey 2012/13, Quarter 3: Statistical Release*, 21 March 2013

⁷ *Foresight*, Issue 83, September 2010. VisitBritain http://www.visitbritain.org/Images/Foresight%20Issue%2083_tcm29-14817.pdf (Sept 2010).

⁸ Visitors from overseas made over 18.7m visits to the 17 museums sponsored by the Department for Culture, Media and Sport in 2011-12. Overseas visits to these museums have increased by 95% over the past decade, from 9.6m in 2001-2. Overseas visitors also make a significant number of visits to our national museums in Scotland, Wales and Northern Ireland, and to those sponsored by the Ministry of Defence.

⁹ *Culture and Heritage Topic Profile*, VisitBritain, 2010

¹⁰ *Activities Undertaken by Visitors from Overseas in Different Areas of the UK*, VisitBritain (November 2010) http://www.visitbritain.org/Images/Activities%20by%20Area%20of%20the%20UK_tcm29-14612.pdf

¹¹ *International Passenger Survey 2009*, Office of National Statistics. This includes those visiting for business, study, work and to visit friends and family as well as leisure.

¹² *Foresight*, Issue 83, September 2010. VisitBritain http://www.visitbritain.org/Images/Foresight%20Issue%2083_tcm29-14817.pdf (Sept 2010).

¹³ *The Art Newspaper*, April 2012

¹⁴ <http://www.iwm.org.uk/sites/default/files/public-document/IWMAnnualReportAndAccount2011-12.pdf>

¹⁵ *Culture and Heritage Topic Profile*, VisitBritain, 2010 <http://www.visitbritain.org/insightsandstatistics/topics/cultureheritage/>

¹⁶ *Culture and Heritage Topic Profile*, VisitBritain, 2010 http://www.visitbritain.org/Images/Culture%20&%20Heritage%20Topic%20Profile%20Full_tcm29-14711.pdf

¹⁷ Trip Advisor

http://www.tripadvisor.co.uk/PressCenter-i5167-c1-Press_Releases.html

¹⁸ <http://www.guardian.co.uk/artanddesign/2011/nov/11/london-exhibition-road-cultural?newsfeed=true>

¹⁹ 7.8% of holiday makers visit a museum, compared to 7.2% visiting a theme/amusement park, 6.7% historic house/stately home/palace. 3.1% of holidays include a visit to an art gallery. The most popular activities do not involve specific attractions: walking around town centre, visiting beach, walking, and "just relaxing", sightseeing on foot or by car.

VisitEngland 2011

http://www.visitengland.org/Images/2011%20Activities%20-%20By%20Destination%20Type_tcm30-33029.pdf

²⁰ VisitEngland 2011

http://www.visitengland.org/Images/2011%20Activities%20-%20By%20Destination%20Type_tcm30-33029.pdf

²¹ *The GB Tourist Statistics 2011*, VisitScotland, Visit England and Visit Wales

http://www.visitengland.org/Images/GB%20Tourist%202011%20-%20FV_tcm30-35051.pdf)

²² *National Museums Scotland Economic Impact Study – Executive Summary*, Biggar Economics (2010)

²³ ONS *Travel Trends 2011* and DCMS Sponsored *Museums Performance Indicators 2011/12*

²⁴ <http://alva.org.uk/details.cfm?p=423>

²⁵ *Scotland: The key facts on tourism 2011*, VisitScotland

²⁶ *National Museums Scotland Economic Impact Study*, BiGGAR Economics (2010)

²⁷ *Popular, Prized and Full of Potential: Yorkshire Museums and the Tourist Offer*, Briefing Paper, funded by Renaissance Yorkshire, on behalf of the Yorkshire Museum Directors' Conference (2010)

²⁸ *Brighton & Hove Visitor Survey 2009*, Tourism South East (December 2009)

<http://www.visitbrighton.com/xsdbimgs/Brighton%20and%20Hove%20Visitor%20Survey%202009%20-%20Final%20Report.pdf>)

²⁹ *Trust Pays: how International cultural relationships build trust in the UK and underpin the success of the UK economy*, British Council, 2012.

³⁰ '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.

³¹ <http://www.thisisbristol.co.uk/Banksy-exhibition-puts-163-10m-Bristol-s-economy/story-11252196-detail/story.html#axzz2LcuTtebo>

³² *Delivering a Golden Legacy*, VisitBritain Consultation Document, 2012

³³ *The Economic Contribution of the Visitor Economy – UK and the nations*, Deloitte, 2010

³⁴ *Delivering a Golden Legacy*, VisitBritain Consultation Document 2012

³⁵ *Delivering a Golden Legacy*, VisitBritain Consultation Document 2012

³⁶ *The Great Britain Day Visits Survey 2011*, VisitScotland, VisitEngland, Visit Wales.

³⁷ *The Supply Side of Tourism*, Office of National Statistics, 2009 <http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-255746>

³⁸ http://www.visitengland.org/Images/GB%20Tourist%202011%20-%20FV_tcm30-35051.pdf

³⁹ *The Economic Contribution of the Visitor Economy – UK and the nations*, Deloitte, 2010

⁴⁰ *Delivering a Golden Legacy*, VisitBritain Consultation Document, 2012

⁴¹ *Delivering a Golden Legacy*, VisitBritain Consultation Document, 2012

http://www.visitbritain.org/Images/9752%20VisitBritain%20Strategy%20Consultation%20Final_tcm29-35127.pdf

⁴² *Government Tourism Policy*, Department for Culture Media and Sport, March 2011.

⁴³ VisitBritain, *22 Market Plans*, 2012

http://www.visitbritain.org/Images/Market%20Plans%20Final_tcm29-35124.pdf

⁴⁴ DCMS Sponsored *Museum Performance Indicators 2010-11*.