Museums Libraries & Archives

Tourism Strategy Scoping Project

Final Report for
Museums, Libraries and Archives Council

December 2009

DCResearch
Economics and Regeneration

CONTENTS

EXECUTIVE SUMMARY

The Museums, Libraries and Archives (MLA) Council commissioned DC Research in October 2009 to investigate the potential to support and deliver success under the tourism agenda, enabling the cultural and tourism sectors to work together more productively. This scoping work aims to inform MLA Council's policy development and ensure that MLA programmes and strategies support the sector in achieving positive outcomes in terms of its contribution to tourism.

Defining the focus of the study

Tourism was included for the first time in the 2009/10 round of business planning for MLA Council, a process which led to references to tourism in Renaissance, and to the commissioning of this Scoping Study. Early scoping consultations with the Study Steering Group helped to determine a focus for this study upon museums more than libraries and archives for the following reasons:

- Most museums, and museums services, recognise their tourism role, but are much less clear of both their existing impact and their future potential. Typically they (museums) are pressed for resources, and have the most to gain of the MLA sectors by being promoted by tourism networks.
- Libraries have a well defined community focus, with tourism unlikely to be a key strategic focus for a modernised libraries service.
- This approach was reinforced by consultation and survey evidence.

Understanding current engagement

Current **engagement of the MLA sector with tourism** stakeholders and networks varies considerably.

- At the national level there is evidence of a disconnection between culture and tourism, despite both sectors being within the remit and responsibility of DCMS. However both Visit England and MLA are ideally placed to address this.
- Regional tourism stakeholders tend to engage with the MLA sector in the context of specific projects at specific museums, with such engagement often being linked to funding.
- Locality approaches vary, and often are dependent upon the approach of museums, and of tourism decision makers.

There is a **clear consensus that visitors are core to the viability of any museum**, especially at times of severe budgetary threats, and that that the key to developing museums for visitors is 'the show' (i.e. the interpretation and offer that is 'sold' to visitors) as this can boost visitors and profile.

However, it is equally clear that **the fundamental underpinning principle of museums in tourism terms is authenticity**. This means that visitors value the scholarship and academic authority that makes museums distinctive from other leisure attractions. Nevertheless, there is a perception amongst tourism stakeholders that many museums lack an outward facing approach, and tend not see their institution from the perspective of the tourist, particularly in regard to journeys, accessibility and experiences.

In general terms, those **museums that are better organised and are more commercially focused tend to be more sensitive to tourist needs**. However there is a consensus that there is a significant 'tail' of museums in all regions that struggle in this regard and museums of all types and sizes will need to become more commercially minded – not simply for tourism reasons, but because increasing visitor numbers is core to future viability.

Scoping potential future engagement

In general terms there is a **clear consensus that museums need to be sharper, and engage better with tourism networks on a commercial basis**. To succeed in this they have to push Destination Management Organisations/Partnerships, and local authorities, harder to get appropriate support.

Tourism stakeholders also need to better understand the potential role of museums. Their focus is often on accommodation and larger attractions, and they can have a 'blind spot' for museums and for culture in general unless lobbied and guided effectively.

Current levels of engagement therefore suggest that the sector needs to focus on three outward facing factors in relation to engagement with tourism:

- Enhancing and **evidencing the economic benefit of its activities**.
- **Widening audience participation and engagement** from groups that typically do not access museums (a factor both out of the scope of this study, and something where significant progress has been made through programmes such as Renaissance).
- **Supporting the 'place' agenda** (as museums and archives are where the story of a place can be accessed and enjoyed).

These factors are supported by a consensus that to achieve this, museums need to **be innovative and work in partnership to develop their offer as a 'product'** to visitors in order to compete effectively with a range of other cultural and leisure attractions.

Museums and libraries could be viable options to consider in locality specific approaches to tourism information. MLA Council should be prepared to take a sector leadership role in supporting any co-location discussions once a strategic debate has been opened about the role and viability of Tourism Information Centres. Any approach needs to be based on the provision of strategic solutions, where it makes sense to do so, on the basis of shared cost and footfall maximisation.

Evidencing the contribution of MLA to tourism

Museums make a highly significant contribution to UK tourism. However, in terms of evidencing contribution, **there is a need to clearly articulate and demonstrate the contribution of museums, in a tourism/economic context**. Objectively and robustly evidencing the contribution of visitors to local, regional and national economies is an issue for tourism in general, and not just museums and the cultural sector. However it is clear that museums and the wider cultural sector need to develop a more 'economics rich' argument.

MLA could best support this process by **agreeing with DCMS, RDAs and DBIS what economic outcomes are appropriate**, and persuasive, going forward.

There is evidence that elements of the MLA sector are already taking action – for example the Association of Independent Museums' 2010 conference is themed 'Tourism & the Visitor Economy', and there are also examples of economic impact studies of key exhibitions being commissioned (such as the Westwood and Banksy exhibitions in Sheffield and Bristol respectively).

Barriers and strengths

In assessing the barriers and strengths in the context of the MLA sector and tourism, it is important to note that not all museums are able to be more commercially focused, and that any process by which museums are selected and developed for visitor potential is critical.

Aside from issues of engagement, some of the **barriers** that museums face in terms of tourism and visitor development are perceptional, and are often both outdated and largely unfair. Other barriers include a consensus that the sector may struggle to accept a level of commerciality inherent in focused approach to tourism and the visitor economy, and that capacity constraints might lead to difficult choices with competing agendas (especially in the case of local authority controlled museums services).

In terms of strengths, it is clear that the **authentic experiences provided by museums are key to developing the tourism potential of the sector**, and this is seen as a key marketing strength by tourism stakeholders.

Beyond authenticity, there is a broad consensus that the potential for further development exists. This is based on an acceptance that heritage and culture is the driver for tourism in the UK, and that the sector possesses 'world class' museums and art galleries. There are opportunities for the sector in terms of various forms of collaboration within it (i.e. with other museums), and with other culture and locality based activities (such as festivals and events). Finally, it is clear that much more could be done through improved dialogue and engagement with regional tourism bodies and DMOs, who are specialists in tourism and visitor focused marketing.

Key conclusions

Tourism is a sector that has significant value to the UK economy, and in an economic and tourism policy climate that is increasingly directing investment in areas of growth potential, it makes sense for museums and the cultural sector more widely to position itself accordingly. In this context, both **distinctiveness and commercial sensitivity are seen as vital to the ability of the museum sector to be competitive** in a crowded market place. Museums have got to stress authenticity and uniqueness, creating experiences that cannot be accessed by any other means.

This needs to be balanced with a common view, across the cultural and the tourism and economic development sectors, that services in both are likely to become targets for budget cuts in the near future, with viability arguments being essential to preserving and developing assets and services. Whilst this context is pessimistic, the evidence supporting this study suggests that there is plenty of scope for the MLA sector, and the museums sector in particular, to enhance its approach to tourism and the visitor economy.

The evidence presented in this report suggests there is a rationale for tourism to be seen by MLA Council as a key part of the solution to supporting the viability of museums, and not just to be considered as an issue in its own right. Additionally, the evidence provided by consultation and survey responses strongly suggests that there is need to take a selective approach, and to do fewer things better.

Recommendations

There are a range of possible actions and activities that MLA Council could support. These are organised into the following headings:

Developing a medium term strategic approach for MLA Council

Whilst in the short term there are a number of macro level uncertainties (not least a general election, which may result in structural change to many of the organisations engaged in both culture and tourism), it is clear that **there is a strategic role for MLA Council that can be developed in the medium term**. There are three key elements in taking forward a strategic approach to tourism for MLA as an organisation:

- **Internally:** Increasing corporate knowledge of tourism, and the role of museums, libraries and archives in tourism. This includes understanding tourism structures and MLA's role in them.
- **Action Planning:** To take tourism forward, including a timeline for relevant strategy development, and a clear understanding of the tourism role of the field teams. This might include altering the direction of certain programmes to maximise tourism potential.
- **Externally:** Development of a MLA tourism position statement to articulate its tourism role and its ability to contribute to tourism priorities.

Short term actions for MLA Council

Progress could be made in the short term by **convening a series of workshops to bring together tourism and museums/cultural stakeholders to look at obstacles and opportunities** for both groups at a strategic level. This approach could take place on a regional basis. This could be led and facilitated by MLA Council and the regional tourism body, and could serve to further focus and calibrate actions resulting from this study.

Beyond this, short term recommendations for MLA Council include:

- **Leadership in taking forward the role of museums and the wider cultural sector in tourism** (such as providing advocacy to the sector, and communicating the MLA tourism role to key tourism stakeholders).

- Developing **MLA Council's role as 'honest broker'** (for example piloting clustering of museums into forms that can be better understood and marketed by tourism stakeholders; maximising the impact of touring collections and loans; and supporting, animating and piloting innovative approaches to museums marketing).
- Supporting **improved evidence on impacts** (making the case for intervention based on economic rationale and return on investment).
- Work with museums and tourism professionals to **continue to raise overall quality and profile** (Renaissance is well placed and well recognised as the most appropriate route for this).
- Take a s**trategic look at role of school visits** to museums (an under-utilised route that could be a significant family marketing opportunity).
- **Linking together tourism activity across the other NDPB**'s and national peers (such as the National Trust).

Short term actions for the MLA sector and Partners

Actions for the MLA sector involve the development of a more proactive approach towards tourism and the visitor economy to improve sector credibility to tourism and economic development stakeholders. This could include:

- More flexible opening hours in high footfall tourism areas.
- Maximising 'drop in' trade through short exhibit specific visits and use of museum facilities as business venues.
- Proactively supporting PR opportunities, and making the best possible use of touring exhibitions.
- Taking up opportunities for training and staff development provided by RDAs, DMOs and others.

Segmentation (such as linking together through specialism, niche, thematic and geographic connections) **and improved collaboration** (such as working with complementary attractions and activities) are areas where museums can improve the ways in which they are marketed to visitors, and better exploit the marketing skills of tourism stakeholders.

Short term actions for tourism stakeholders

Visit England and DMOs are professional marketing agencies, and as such represent resources that should be better exploited by the museums sector. Museums in tourism terms are a product, and can be marketed as such. It follows that there is a clear role for tourism partners in taking and promoting new developments and collaborative approaches from both MLA Council and the sector to the market place.

1 INTRODUCTION

1.1 The **Museums, Libraries and Archives (MLA) Council** commissioned DC Research to investigate the potential for MLA to support and deliver success under the tourism agenda, enabling the cultural and tourism sectors to work together more productively. This scoping work aims to inform MLA's policy development and ensure that MLA programmes and strategies support the sector in achieving positive outcomes in terms of its contribution to tourism.

1.2 The objectives of the study, as set out in the Invitation to Tender, are designed to enable MLA Council to:

- Identify its place and role in supporting and delivering success under the tourism agenda.
- Identify and make connections with key partners and stakeholders.
- Understand the context of the work.
- Undertake planning in order to embed this work in existing MLA programmes and strategies.

1.3 The key questions for the Study to address were:

- In what ways can museums, libraries and archives contribute to and support tourism agendas at local, regional and national levels?
- In what ways can the cultural and tourism sectors work together to align priorities, maximise efficiencies and deliver more effectively?
- What is the most effective and efficient way for MLA to support the sector in pursuing these aims?
- How might MLA's role in supporting and promoting tourism fit with the roles of Visit Britain and Visit England?
- What is the most appropriate way of working with Arts Council, English Heritage and Sport England to ensure synergies at a national and regional level?
- How can MLA best work with the RDAs to ensure that the sector is represented in the appropriate tourism related regional and sub-regional plans?
- What other partners should MLA seek to develop relationships with and/or work with in order to best pursue the tourism agenda, and for what purpose?

1.4 This **final report** is structured as follows:

- The remainder of this section (**Section 1**) discusses and considers the scope and focus of the Study.
- **Section 2** provides an overview of the approach and methodology used for the Study.
- **Section 3** provides a summary of current tourism structures, and a brief analysis of evidence supporting the current contribution of the MLA sector to tourism. It also sets out the prominence of the sector in key tourism policy documentation at national and regional levels.
- **Section 4** considers the current and potential future contribution of the MLA sector to the tourism agenda, the levels of engagement the sector has with tourism structures, and examines issues around evidencing the sector contribution to tourism and local economies.
- **Section 5** provides an overview of the key barriers and challenges and strengths and opportunities that exist in terms of MLA and tourism, and the potential role of MLA Council in this context.
- Finally, **Section 6** sets out next steps and recommendations for MLA Council, and the MLA sector (and other tourism stakeholders), to further the contribution and impacts that it can make in regards to tourism.

1.5 The study team would like to thank all those who participated in the research through consultations and by responding to the survey. A list of consultees is set out in Appendix 1 to this report, and a summary of the type of survey respondent is provided in Appendix 2.

1.6 Finally, the study team would also like to thank the Steering Group (Jon Finch, Jenny Ngyou and Wendy Parry from MLA Council, and Julia Stuckey from SWRDA) for their guidance and support throughout.

Defining the focus of the study

1.7 Tourism was included for the first time in the 2009/10 round of business planning for MLA Council, a process which led to references to tourism in Renaissance, and to the commissioning of this Scoping Study.

1.8 This does not mean that it is necessarily appropriate, or desirable, to treat each of the constituent parts of the MLA sector (i.e. museums, libraries and archives) equally when assessing the scope to improve engagement with tourism networks, and potential for improved tourism positioning. Therefore it was important that the focus of the MLA sector with regard to tourism was defined and clarified at an early stage in the Study.

1.9 Early scoping consultations with the Study Steering Group helped to determine a focus for this study upon museums more than libraries and archives for the following reasons:

- Most **museums and museums services** recognise their tourism role, but are much less clear of both their existing impact and their future potential. Museums can often be seen as the element of culture that brings together much of DCMS's activity in places, and Tourism brings people to places. Typically they (museums) are pressed for resources, and have the most to gain of the MLA sectors by being promoted by tourism networks.
- **Libraries** have a well defined community focus, and whilst there are opportunities in terms of service and information provision to visitors, tourism is unlikely to be a key strategic focus for a modern libraries service.
- The tourism potential of **archives** is widely recognised, and ancestral tourism in particular is regarded as a very exciting and lucrative niche tourism development, with a target market that has a significant propensity to consume heritage products and services.

1.10 Whilst this led the study towards a natural emphasis on museums over archives and libraries in respect of tourism strategy scoping, it is important to note that the study sought to assess the extent to which this hypothesis (that museums are the primary route through which the MLA sector can engage with tourism) is valid in both the consultations and the survey carried out as part of this project. The results of this are presented in this report – especially in Section 4.

Terminology

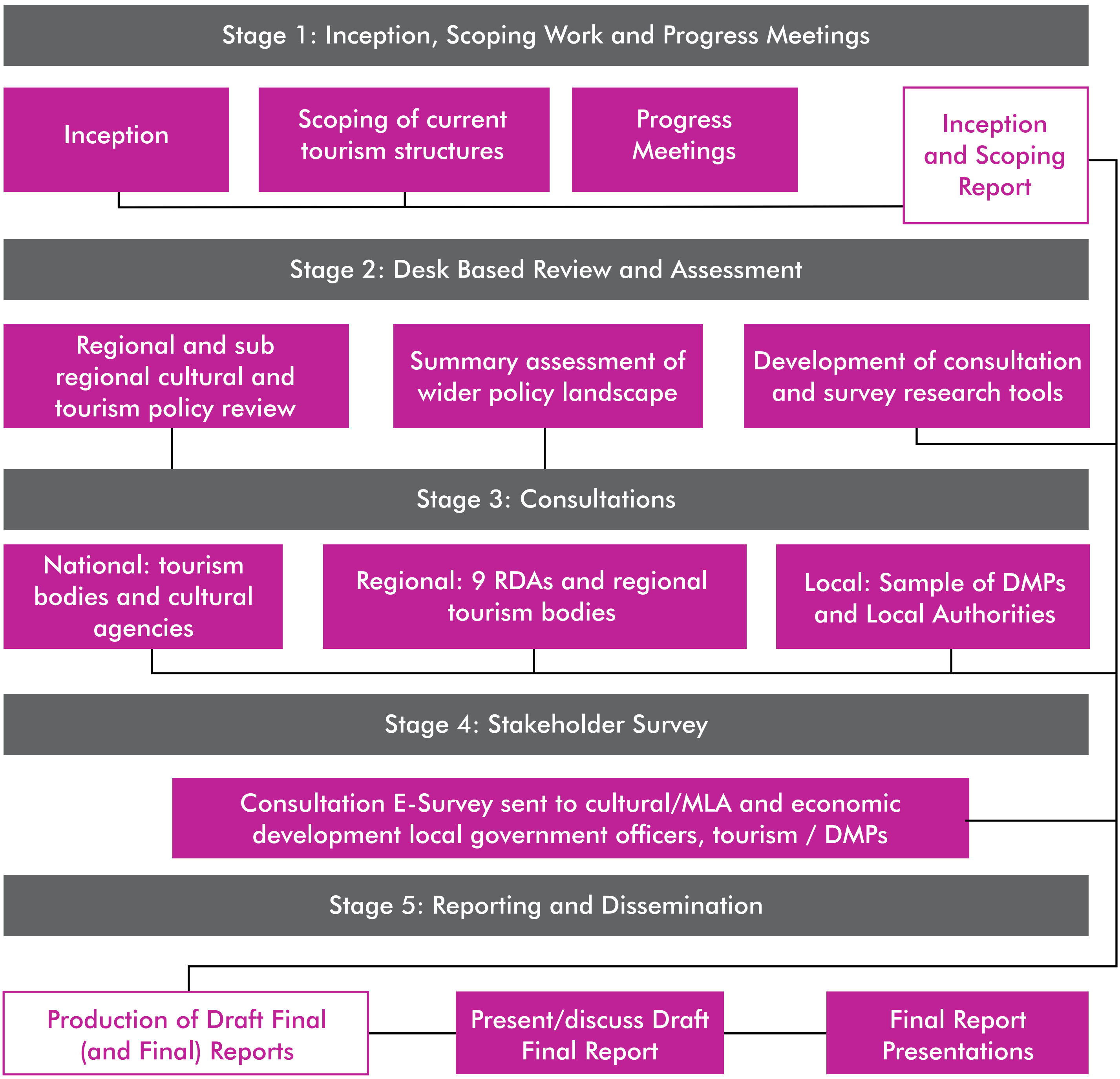
Please note, for simplicity, throughout this report we use the following terms:

- DMO (or DMP): Destination Management Organisation or Partnership.
- LAA: Local Area Agreement.
- MLA (Council) – to mean the organisation – i.e. the Museums, Libraries and Archives Council.
- MLA sector – to mean the museums, libraries and archives services collectively, and any reference to 'the sector' means the MLA sector.
- NI 10: National Indicator 10 (Visits to museums or galleries).
- RDA: Regional Development Agency.
- RES: Regional Economic Strategy.
- TIC: Tourism Information Centre.
- VFR: Visiting Friends and Relatives.

2 APPROACH AND METHOD FOR THE RESEARCH

2.1 The approach and method adopted for this study is summarised in Figure 2.1 below. The approach was a five stage method, covering early inception and scoping work; desk based review and assessment; consultations with key tourism and MLA sector partners; a stakeholder survey; and reporting and presenting the findings at various stages of the study.

Figure 2.1: Approach and Methodology – Summary of Process



2.2 **Stage 1** was carried out during October 2009 and involved meeting with MLA Council to agree the scope and method for the study, a preliminary review of the key documents, as well as face to face scoping consultations with the members of the Steering Group and key representatives from sectoral organisations.

2.3 **Stage 2** involved carrying out a **review of the key documentation** (namely evidence supporting the current contribution of the MLA sector to tourism, as well key tourism policy documentation at the national and regional levels).

2.4 In **Stage 3** the study team carried out a range of one to one **consultations with key individuals** (i.e. MLA Council representatives, national organisations, tourism representatives from RDAs, Regional Tourism Boards, DMOs/DMPs, and a range of MLA sector representatives). In total 40 consultations were carried out with 45 consultees, and a list of consultees is provided in Appendix 1 to this report.

2.5 A **workshop with a cross section of MLA Council staff** was also carried out in late November 2009, with 10 members of MLA Council staff attending. The workshop focused on discussing: current position of MLA Council in relation to tourism, and future opportunities for development; current position of the MLA Sector in relation to tourism, and future opportunities for development; particular examples of both good practice and engagement; Strengths, Weaknesses, Opportunities and Threats facing the sector in terms of tourism and tourism development; and suggested actions to maximise and realise strengths and opportunities, and minimise and mitigate against weaknesses and threats.

2.6 **A stakeholder survey** being sent to key tourism partners, sector professionals from museums, libraries and archives, wider cultural partners and economic development/regeneration partners formed **Stage 4** of the study. This was a web-based survey, which was distributed by a variety of means (direct emails; emails via professional associations; postings on bulletin boards; press releases on key organisation websites; and so on).

2.7 A total of 128 replies were received from the e-survey that was carried out during November and early December 2009. Once duplicate responses and non-valid replies were taken into account, there were a total of 110 valid replies (although it should be noted that not every respondent replied to every question).

2.8 In terms of the split between 'areas of work' of respondents, the Table below shows the results for this question (respondents were able to tick more than one category, hence the total does not sum to 100 percent)

***Table 2.1:** Which of the following best describes your role?*

	Percent	Count
Tourism	36.2%	38
Museums	44.8%	47
Libraries	8.6%	9
Archives	8.6%	9
Culture	13.3%	14
Economic development / regeneration	11.4%	12
Other	13.3%	14
Source: DC Research Survey; n=105		

2.9 Table 2.1 shows that most replies were from people involved in museums, followed by people involved in tourism. Given the recognition discussed earlier in this report about museums having the strongest links to tourism, it is reasonable to conclude that the survey has achieved a good level of response from the museums sector, and from those involved in tourism, and as such the survey results can be assumed to give a broadly representative summary of current views.

2.10 Similarly, the survey also asked at what geographic scale respondents' organisations operated at, and Table 2.2 below shows that most operate at the local level, with regional and sub-regional also well represented.

***Table 2.2:** At which geographic scale does your role within your organisation primarily operate at:*

	Percent	Count
Local	36.5%	38
Sub-regional	21.2%	22
Regional	22.1%	23
Pan-regional	1.9%	2
National	12.5%	13
Other	5.8%	6
Source: DC Research Survey; n=104		

3 TOURISM CONTEXT: STRUCTURES, POLICY AND EVIDENCE

3.1 This section sets out the prominence of the MLA sector in key tourism policy documentation at the national and regional levels and provides a brief analysis of evidence supporting the current contribution of the MLA sector to tourism.

Museums, Libraries and Archives

3.2 The **Museums, Libraries and Archives Council** is a Non-Departmental Body sponsored by the Department for Culture Media and Sport and is the lead strategic agency for museums, libraries and archives. MLA Council works to improve people's lives by building knowledge, supporting learning, inspiring creativity and celebrating identity.

3.3 In autumn 2009 MLA Council published ***Leading Museums, A Vision and Strategic Action Plan for English Museums***. *Leading Museums* envisages a future where excellent regional and national museums develop their collections in ways that reach beyond their walls and put people first. It outlines a future approach based on working together to pursue three objectives: Supporting Excellence; Promoting Partnerships; and Building Capacity.

3.4 In terms of tourism, *Leading Museums* stresses that all museums, (including those in local authority ownership), need encouragement and support to make stronger contributions to the creative and tourism economies, with greater freedom to develop learning and commercial partnerships.

3.5 In addition to *Leading Museums*, it is useful to also set out current key documentation in terms of Libraries and Archives. Whilst these documents do not have a direct tourism focus, they set the key policy and improvement context for the MLA sector and MLA Council:

- ***Archives for the 21st Century***, published in November 2009 by HM Government, acknowledges that archives can and do make a clear contribution to the delivery of local policy initiatives, often in partnership with others. It argues that the profile of archives have been significantly raised by recent television programmes (such as "Who Do You Think You Are?") which has increased the numbers of visitors inspired to use archives to explore their family or local history.
- In terms of Libraries, neither the 2008 MLA ***Library Action Plan***, nor the current DCMS consultation (***Empower, Inform, Enrich: The modernisation review of public libraries***) make specific reference to the tourism role of libraries. However the potential role of libraries in the context of tourism information is discussed in Section 4.

3.6 **A Passion For Excellence** is England's improvement strategy for culture and sport (I&DeA, March 2008). It is focused on supporting local government as "leaders of place", working with their local partners to deliver better outcomes, improve the quality of life locally and improve the delivery of cultural and sport services to local people.

3.7 Whilst A Passion for Excellence includes tourism and visitor attractions in its definition of culture and sport, there is little direct reference to tourism beyond this definition. Nevertheless, links are made with in terms of the visitor potential of assets in local areas.

"Over 400 historic properties and assets which are open to the public provide local areas with unique visitor attractions and local distinctiveness. They also act as an invaluable educational tool for councils and schools to improve educational attainment in key subjects. The properties present opportunities for outreach with the potential to engage communities in activities based at sites"[1].

3.8 The **National Museums** are, like MLA Council, part of the DCMS family of organisations. However, MLA Council has much less influence on their direction, policy and programmes in comparison to local authority controlled services, museums trusts and even independent museums. However, this distinction in relation to tourism and visitors is largely irrelevant from a tourism perspective – the visitor tends to focus on the quality of the experience, and will not distinguish between types of museums, or indeed between museums, galleries and other authentic heritage experiences (e.g. buildings and heritage sites). To reflect this, the study considers museums as a sector, and refers to specific museums types (national, independent, local authority, or trust) only when necessary.

Summary of the approach taken by MLA 'Peers'

3.9 MLA Council is not the only cultural agency for whom tourism and the visitor economy represent an opportunity to improve performance and support the viability of services going forward.

3.10 Arts Council England is the national development agency for the arts in England, distributing public money from the Government and the National Lottery. It supports a range of artistic activities from theatre to music, literature to dance, photography to digital art, carnival to crafts. Like MLA Council, **Arts Council England** does not currently have a published policy position or strategy regarding tourism.

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1. *A Passion for Excellence – Culture & Sport Improvement Strategy: An Integrated National Offer of Support to Councils to Help Them Improve Culture & Sport Services*, I&DeA March 2009

3.11 **The National Trust** is both a major tourism business and conservation charity, and as such encapsulates many of the commercial and curatorial tensions that can exist for museums in relation to tourism development. In recent years the Trust has become increasingly supporter focused, and has developed a target of increasing visitor engagement that sits alongside traditional conservation objectives. In 2008/09 there were over 13 million visits to National Trust properties in England.

3.12 The National Trust has found that its core market in visitor terms is domestic, and has tailored its approach to visitor engagement accordingly, typically engaging as an organisation at the national, regional and local levels, with DMO engagement being on a property by property basis.

3.13 Like the National Trust, **English Heritage** balances a conservation and visitor role, although it is a Non Departmental Public Body, and also has a statutory planning role. In 2008/9 there were five million paying visits to English Heritage attractions and an estimated 6.2 million visits to its free sites[2]. To enhance tourism links, English Heritage is supporting the post of heritage tourism executive in the North West jointly with NWDA. It is also working in partnership with the Historic Houses Association and the National Trust to support work with local tourist boards to make the region's historic attractions more appealing to visitors, including flagship heritage sites such as Hadrian's Wall.

Tourism: national context and structures

3.14 The **Department of Culture, Media and Sport** (DCMS) is responsible for supporting the tourism industry at the national level, and for placing regional and local support for the sector into a strategic context.

- In 2005 DCMS published a consultation paper, ***Understanding the Future: Museums and 21st Century Life***, with the intention of stimulating a debate on the issues surrounding the museums and galleries sector. Responses strongly favoured the creation of a national strategy that would embrace the whole sector. *Understanding the Future: Priorities for England's Museums*, which followed in 2006, made a series of recommendations under five headings: identity, collections, workforce, structure and learning.
- In terms of tourism policy, much is devolved to VisitBritain and VisitEngland,

2. *Heritage Counts 2009*, English Heritage

with the key DCMS documents being 1999's ***Tomorrow's Tourism Today***, and the ***Ministerial Reform Programme*** from 2002 which established Visit Britain. With specific regard to the 2012 Olympics, '***Winning: A Tourism Strategy for 2012 and beyond***' was launched in 2007.

- More recently, the Tourism Advisory Council was established in April 2009 to bolster Government support for the tourism industry.

3.15 In England, **VisitEngland** is the strategic leadership body representing the public and private sector stakeholders of English Tourism. It works in partnership with: VisitBritain; the Regional Development Agencies and local authorities; and the private sector, creating a national tourism strategy, optimising marketing investment, and developing the visitor experience across England.

3.16 **VisitBritain** is responsible for marketing Britain overseas and promoting the tourism industry within the UK itself, and defines culture as cultural heritage, built/historical heritage and contemporary culture. Culture and heritage embraces:

- The performing arts – including dance and theatre.
- Museums and art galleries.
- Music, literature and film.
- Heritage sites.
- Historical associations – people, places, industries.
- Visitor attractions.
- Festivals and events.
- The cultural identity and way of life of local communities – cuisine, customs and traditions.
- Language, vernacular architecture.
- Locally distinctive food and drink.

3.17 According to the Visit Britain Business Plan 2009/10, the **Value Britain campaign** will promote the benefits of the free museums and galleries that are one of Britain's major appeals over rival destinations.

3.18 Visit England are currently consulting with partners at a national level and through the Partners for England network ahead of the publication of the England Tourism strategy. In the context of this study, consultees at the strategic level are increasingly aware that there has been a policy shift away from a homogenous approach, and the use of tourism as a regeneration tool in deprived areas and towards 'picking winners' and making the most of market opportunities.

3.19 The strategy, which when published will be a 10 year tourism strategy for England, will have a focus on great destinations and creating great places, and will support the sector in providing great experiences, great marketing and great access.

3.20 **Partners for England** is a collaborative initiative owned by public and private stakeholders with a shared sense of purpose: an interest in the prosperity of England's visitor economy. The objective is to create a shared sense of purpose through agreeing a core set of priorities for joint action and delivery.

3.21 A forum was created in 2007 with the remit of securing engagement on key issues surrounding the English tourism industry. This forum:

- Informs and influences England's tourism strategy.
- Offers direction and acts as an expert advisory panel to VisitEngland.
- Ensures stakeholder buy-in and cohesion.
- Promotes outcomes with the tourism communities it represents.
- Actively involves the industry.
- Maximises the value of resources across the tourism sector through partnership working.

3.22 It is important to note that many consultees from RDAs and tourism bodies are anticipating significant change to tourism structures over the next 12 to 18 months as a result of the new Visit England Strategy, the general election (which is due to take place in May 2010 at the latest) and potential changes to regional structures as a result. Despite all this, many report good market conditions over the last 12 months, with increases in both domestic and overseas visitors.

Tourism: regional context and structures

3.23 Regional Development Agencies (RDAs) took the role of strategic leads for tourism in 2003, with DCMS as the sponsoring department. As a consequence, strategic tourism policy and development in England at the regional level is the responsibility of RDAs, and whilst there is no standard approach, there tends to be a tourism strategy for each region, with destination management organisations/partnerships (DMOs/DMPs) typically having devolved responsibilities at the sub-regional level.

3.24 This has led to a relatively consistent approach to tourism and visitor management at the regional level, with some regions having dedicated regional tourism bodies (such as Welcome to Yorkshire, Tourism South East, East of England Tourism), whilst others manage regional tourism priorities in house. This is delivered either by a regional board advising on strategic priorities and direction (such as Tourism West Midlands), or by devolving directly to DMOs (such as emda).

3.25 Many RDAs recognise that people visit places as opposed to regions, and destinations are very place specific. Therefore DMO structures vary considerably, often as a result of the concentration of tourist activity, and the approach to tourism taken by local authorities. Tourism therefore is treated differently in different places, being strong in areas of high profile and high footfall and less well developed elsewhere.

3.26 Table 3.1 summarises the regional and sub-regional structure for tourism on a region by region basis.

Table 3.1: *Regional Tourism Structures*

Region	RDA	Regional body	Sub-regional Partnerships
East Midlands	emda	East Midlands Tourism (in-house)	• Experience Nottinghamshire • Explore Northamptonshire • Leicester Shire Promotions • Lincolnshire Tourism • Visit Peak District & Derbyshire
East of England	EEDA	East of England Tourism (external membership based organisation).	Six County Partnerships (Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk) and 32 member Local Authority Partners
London	London Development Agency	Visit London	Visit London is responsible for marketing and business tourism, with London Assembly being responsible for culture.
North East	One North East	One North East Tourism (in-house)	• Northumberland Tourism • County Durham Tourism Partnership • Visit Tees Valley • Tourism Tyne & Wear
North West	NWDA	Tourism England's North West	• The Mersey Partnership • Lancashire & Blackpool Tourist Board • Cumbria Tourism • Visit Chester & Cheshire • Visit Manchester
South East	SEEDA	Tourism South East (external membership based organisation).	• Tourism Hampshire • Kent Tourism • Isle of Wight Tourism • Sussex Tourism Partnership • Tourism Surrey • Berkshire, Bedfordshire and Oxfordshire Tourism Partnership. Six area tourism partnerships. 55 local authority partners and 2500 commercial members
South West	SWRDA	South West Tourism (co-located with SWRDA from January 2010).	• Bath Tourism Plus • Bournemouth & Poole Tourism • Cotswolds and the Forest of Dean DMO • Destination Bristol • Destination Dorset • Somerset Tourism Partnership • Visit Cornwall (includes the Isles of Scilly) • Visit Devon • Visit Wiltshire
West Midlands	AWM	Tourism West Midlands (in house)	• Black Country Tourism • CV One (Coventry and Warwickshire) • Destination Staffordshire • Destination Worcestershire • Marketing Birmingham • Shakespeare Country (South Warwickshire • Visit Herefordshire • Shropshire Tourism
Yorkshire & The Humber	Yorkshire Forward	Welcome to Yorkshire (external membership based organisation).	• Visit Hull and East Yorkshire • Visit York • West Yorkshire Tourism Partnership • Yorkshire Dales and Harrogate Tourism Partnership • Yorkshire Moors and Coast Tourism Partnership • Yorkshire South Tourism
Source: Consultations and www.uktourismpro.net, accessed 1st December 2009.			

3.27 Whilst there is structural variance across regions, destination management organisations/partnerships (DMOs) are responsible for managing their sub-region as a tourist destination and working with local stakeholders, and are the first point of contact for businesses and visitors.

3.28 In general terms, **tourism businesses tend to be small businesses**, and as such it has always been a challenge for groups and organisations (public and private sector) to fully represent the sector and get all elements (attractions, accommodation providers, transport, local authorities etc) to speak collectively. As a partial consequence of this, many DMOs are membership run organisations, and historically, the longer established ones have spun out of independent and commercial operations.

3.29 Increasingly DMOs have evolved into structures that suit the visitor and tourism volume priorities of a particular area, as opposed to a single solution approach for each sub-region. For example in the West Midlands, Marketing Birmingham and Shakespeare Country (Stratford and South Warwickshire) are well established organisations with a clear promotional role, whereas CV One combines a DMO role for Coventry and Warwickshire with City Centre management, reflecting the comparative locational needs of each.

3.30 In addition to the approach set out in Table 3.1, it is important to note that local authorities can often have a proactive role in locality approaches to tourism (over and above being key partners and funders of DMOs). This is most notable in areas with a significant and well developed visitor economy, where these approaches are typically being strongly linked to wider economic development policy and activity. Indeed the cultural assets of local authorities are often essential in the offer of a particular place, with local authorities' investment in tourism being over £118m in 2005/6.[3]

3.31 Most local authorities understand the value of tourism, but there can often be issues around conflicting community and visitor priorities with DMOs (such as investment in public realm).

3. Source: Local authority net current expenditure from Local Government Financial Statistics England no 17 (2007), Table C1; DCMS; ACE Grant-in-aid listing.

MLA sector and regional economic / tourism strategies

3.32 Prior to setting out the position of the MLA sector as contained in regional economic and tourism strategies, it needs to be noted that many of these documents have been in place for a number of years, and are likely to be updated as a result of the both the duty to produce integrated regional strategies (following the Local Democracy, Economic Development and Construction Act 2009), and also the forthcoming Visit England Tourism Strategy. It is important that this analysis is therefore used simply to illustrate the extent to which MLA as a sector, and museums in particular, are currently referenced in regional economic and tourism policy and strategy:

- In the **East of England**, the regional economic strategy references particular museums (such as the Imperial War Museum, Duxford, and the Museum of Power), but there is little reference to cultural tourism. This approach is mirrored by the most recent annual reports and business plans produced by East of England Tourism.
- The **East Midlands** Tourism Strategy highlights Arts Council England funded investment in visual and performing arts as part of 'Happening Cities', and makes reference to the need for 'a major new museum and gallery for Lincoln'. The strategy also acknowledges the contribution that regeneration makes to tourism, and specifically cites the importance of high quality canal attractions such as Foxton Locks and Inclined Plane, and Northamptonshire's Stoke Bruerne Canal Museum and Braunston Locks, and also cites ancestral tourism as an opportunity in the region.
- The East Midlands Regional Economic Strategy references the role of culture in the tourism strategy, and stresses that awareness of the arts, culture and heritage contributes to the fabric of a flourishing region. However there is no direct reference made to museums.
- The **West Midlands** Visitor Economy Strategy highlights museums in context of sub-regional priorities, and makes mention of museums in the context of the region's key heritage visitor attractions e.g. Ironbridge Gorge Museum and World Heritage Site, RAF Cosford and the Wedgwood Visitor Centre.
- In the **North East**, the regional tourism strategy makes reference to *"many popular tourist attractions and museums, including the Alnwick Garden, Beamish, The North of England Open Air Museum, The Bowes Museum and Locomotion, the new railway attraction at Shildon"*. Museums tend to be aligned with rural visitors, with 'city break' approach focusing more on arts and cafe culture. The Regional Economic Strategy uses a number of regions as illustrations in the document, and has *'North East England's Natural, Heritage and Cultural Assets'* set as a priority under the Place area for action.

- In the **North West**, there is no explicit reference to museums in the regional tourism strategy (which was produced in 2003 and refreshed in 2007), but references to heritage and culture are prominent. The Regional Economic Strategy focuses on the cultural offer of Liverpool (Capital of Culture 2008) and Manchester as cities.
- The **Yorkshire** Visitor Economy Strategy makes reference to *"over 180 galleries and museums, World Heritage Sites, abbeys, castles and some of Britain's grandest stately homes"*. The Regional Economic Strategy lists the key cultural assets of the region (albeit with a focus on events) and stresses the need to develop and co-ordinate cultural assets, attractions and events to make the region a more attractive place to locate or visit.
- The **London Tourism Strategy** mentions the role of DCMS and MLA Council, but does not directly mention museums. The Regional Economic Strategy makes reference to the Mayor's Culture Strategy and Strategic Tourism Plan, and also to *"its knowledge infrastructure and networks, built around world-class higher education institutions (HEIs), libraries and museums, learned and professional bodies"* as one of London's key resources. It also refers to "a heritage of institutions including universities, museums and galleries".
- The **South West** Regional Economic Strategy highlights that tourism drives the perception and reputation of the South West and provides employment to many in otherwise marginal economies. There is a pressing need to improve the quality of the offer and to make the industry more productive and more sustainable. However there is little direct reference to culture, and no mention of museums.
- The **South East** Regional Economic Strategy notes that the region is home to 190 art galleries, over 250 performing arts venues, more than 12,000 sports clubs, 500 libraries, over 300 museums, and 218 registered archives. However there is no direct reference to museums in *"Tourism ExSEllence: The Strategy for Tourism in the South East"*.

Tourism impact: MLA sector evidence

3.33 Museums play a significant role in attracting visitors and in building and contributing to the national 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, with **eight of the top 10 UK visitor attractions in 2008 being museums and galleries**[4].

4. Museums and Tourism Briefing Paper, NMDC

3.34 Whilst there are a range of approaches taken to measuring impact, there is a clear consensus that museums are major beneficiaries of income from visitors, who contribute directly to the tourism economy. Stakeholders are currently (December 2009) awaiting the finalisation of a study commissioned by the Heritage Lottery Fund ('***Economic impact of the UK heritage tourism economy***', by Oxford Economics and commissioned by the Heritage Lottery Fund).

3.35 This study, which has engaged key heritage stakeholders (including English Heritage, MLA Council, NMDC, The National Trust and DCMS) takes forward the macroeconomic understanding of the contribution of 'heritage' (including museums, libraries and archives) to the economy in an HM Treasury recognised (i.e. 'Green Book' style) gross direct impacts approach.

3.36 Other useful studies that contribute to the evidence base on the impact of the MLA sector towards tourism include:

- ***Maximising the Contribution of Heritage to the North East Regional Economic Strategy and North East Tourism Strategy***, Tribal for One NorthEast, conceptualises heritage in a regional tourism setting, and proposes a regional framework for heritage in a tourism marketing context.
- VisitBritain's ***The Economic Case for the Visitor Economy***, notes the regeneration impacts of museums, and also the potential market distortions created by large free museums.
- ***Assessment of the contribution of MLA to the visitor economy***, Roger Tym & Partners for MLA Council South East. This report sought to quantify the value the MLA sector adds to the tourism product, and its contribution through direct and indirect visitor expenditure, to the local and regional economy. It found that whilst libraries were focused towards resident and community use, archives attract a significant number of visits. However museums are by far the most significant economic contributor. They are responsible for a total spend of around £224m, or 97 percent of total MLA related visitor spend, and supporting over 3200 jobs as a direct result of visitor spend (compared to 60 for libraries and 23 for archives).
- ***Museums and Galleries in Britain: Economic, Social and Creative Impacts***, by Tony Travers of the London School of Economics, argues that the UK's museums and galleries could, with greater capacity to expand and improve, allow this country to be a world leader in creativity and scholarship.

The report, which was jointly commissioned by the National Museum Directors' Conference and the Museums, Libraries and Archives Council, analyses a number of Britain's leading museums and galleries in terms of visitor numbers, economic impacts, civic functions, and contributions to the country's creativity and educational performance. It found that in 2006, overseas visitors to major UK museums and galleries spent £350 million as a result of their visit and UK visitors, who spend considerably less per visit, were estimated to have spent £245 million in 2004-5. The LSE study also found that visitor surveys show that the vast majority of visitors have a positive experience in major museums.

- Popular, Prized and Full of Potential: Yorkshire Museums and the Tourist Offer Briefing Paper for Renaissance Yorkshire on behalf of the Yorkshire Museum Directors' Conference sets out to explore what museums in Yorkshire contribute to tourism and how they can make the case for support and investment with the tourism sector. It argues that:
  - Museums and galleries are more popular than any other type of attraction in Yorkshire.
  - Market growth for Yorkshire's museums is double the national average.
  - Visitors rate museums, galleries and sculpture as the best of Yorkshire.
  - Museums and galleries deliver the highest visitor satisfaction in the region.
  - Visitors to museums and galleries are high spenders.
- The Role of Archives within tourism: A review of current archives tourism activity and opportunities for tourism development involving archives in North East England, Cultural Consulting Network for MLA North East and Northumberland Tourism, found that there was limited information and analysis available upon which to base judgements about the true value of the contribution of archives to the UK's tourism market. However, it argues that archives are involved in a range of tourism initiatives without being central to any specific type of tourism offer.
- A 2008 report by the Cultural Consulting Network and Seabridge Consultants on Ancestral and Literary Tourism in the East Midlands argues that while heritage & history are an important part of the appeal of all parts of the East Midlands region, at the macro level ancestral tourism related promotion is not visible. It also found that there is a relative dearth of statistical information on which to base decisions and justify investment of resources, and that literary tourism promotion by the tourism agencies is small scale, patchy and only really visible where linked to films.

4 THE ROLE OF MUSEUMS, LIBRARIES AND ARCHIVES IN TOURISM DEVELOPMENT

4.1 This section of the report considers the current and potential future contribution of the MLA sector to the tourism agenda, and the levels of engagement (current and potential) that the sector has with tourism structures.

Current MLA sector engagement in tourism

4.2 In terms of the engagement of the MLA sector with tourism, the survey results show that there is better engagement at the local and sub-regional levels than there is at regional and national levels.

Table 4.1: *From your perspective, currently how well engaged with tourism is the Museums, Libraries and Archives sector at each of the following levels?*

	Very	Moderate	Minor	None	Don't know
At the local level	21.9% 21)	52.1% (50)	20.8% (20)	4.2% (4)	1.0% (1)
At the sub-regional level	12.5% (12)	42.7% (41)	32.3% (31)	5.2% (5)	7.3% (7)
At the regional level	12.5% (12)	35.4% (34)	37.5% (36)	9.4% (9)	5.2% (5)
At the pan-regional level	6.3% (6)	17.7% (17)	40.6% (39)	12.5% (12)	22.9% (22)
At the national level	10.4% (10)	24.0% (23)	37.5% (36)	11.5% (11)	16.7% (16)
Source: DC Research Survey; n=96					

4.3 Table 4.1 shows that the majority of respondents think engagement at the local and sub-regional level is moderate, whilst the most common response for regional and national levels is of minor engagement.

4.4 Considering current levels of **engagement with key tourism partners**, the majority of respondents **did not know** how well engaged the MLA sector was with each of these partners. Of those that were able to say, only with local authorities did the majority of respondents think that there was a moderate level of engagement. With all other partners, the most common response was either minor level of engagement or no level of engagement at all. Those **partners with whom no engagement was the most common response** were DMOs/DMPs and locality partnerships (including town centres and place specific groups).

***Table 4.2:** From your perspective, how well engaged is the Museums, Libraries and Archives Sector with each of these at the moment?*

	Very	Moderate	Minor	None	Don't know
VisitBritain / VisitEngland	2.4% (2)	22.0% (18)	24.4% (20)	6.1% (5)	45.1% (37)
The National Museums	24.7% (20)	32.1% (26)	3.7% (3)	0.0% (0)	39.5% (32)
Other national organisations	5.1% (4)	15.4% (12)	20.5% (16)	1.3% (1)	57.7% (45)
Regional Development Agencies	1.2% (1)	21.0% (17)	38.3% (31)	4.9% (4)	34.6% (28)
Regional Tourism Bodies	1.2% (1)	17.3% (14)	35.8% (29)	9.9% (8)	35.8% (29)
DMOs/DMPs	1.2% (1)	12.2% (10)	26.8% (22)	25.6% (21)	34.1% (28)
Local authorities (including TICs)	3.7% (3)	34.6% (28)	24.7% (20)	8.6% (7)	28.4% (23)
Locality partnerships	0.0% (0)	11.1% (9)	18.5% (15)	25.9% (21)	44.4% (36)
Other visitor attractions	1.3% (1)	12.5% (10)	27.5% (22)	13.8% (11)	45.0% (36)
Source: DC Research Survey; n=83					

4.5 A number of consultees made direct reference to a **disconnection at the national level between culture and tourism**. The survey results provide useful context in terms of both supporting and triangulating this point. Ideally tourism should be linked across heritage, museums and the arts. However it (tourism) is often seen as a mass market activity ('bucket and spade and fairgrounds'), with museums, arts etc. being perceived as high culture. As such there is a need for tourism to be better joined up from the DCMS level through to localities and place specific working.

4.6 VisitEngland and MLA Council are ideally placed to address this disconnection between tourism and the wider cultural sector:

- A number of strategic stakeholders anticipate that the VisitEngland strategy (which is expected in early 2010) will be clear in its articulation of the role of culture in tourism, and will provide a useful hook for engagement – with the rich and unique culture and heritage of England being seen as one of the key tourism opportunities.
- MLA Council has recently become prominent in engaging with tourism decision makers at the national level, which has been welcomed by a range of stakeholders (including other NDPBs), and there is broad support for the MLA Council taking the lead on strategic work on museums and tourism, piloting approaches and lessons that could be transferrable to other parts of the cultural sector.

4.7 **At the regional level**, regional tourism organisations tend to get involved in specific projects at specific museums, and engage with those museums that develop events and rework their collections to broaden appeal and visitor numbers. Many cite a clear link between investment in quality and increased visitor numbers. For example East of England Tourism was the ticketing partner for, and provided marketing/PR and campaigns expertise to, Colchester Museum's Guardian to the King Exhibition.

4.8 Typically, engagement at the regional level tends to be strategic, with individual museums who do engage with tourism organisations engaging directly with their DMO. However there is a perception amongst tourism stakeholders that many museums lack an outward facing approach, and tend not see their institution from the perspective of the tourist, particularly in regard to journeys, accessibility and experiences.

4.9 Consultations highlighted a range of approaches and levels of engagement in a range of **localities**, much of which is dependent on the priorities and attitudes of museums, the flexibility provided by their governance structure, and the attitude of tourism decision makers. In general terms this can be summarised through the understanding of the following two points:

- Firstly there is consensus that visitors are core to the viability of any museum, especially at times of severe budgetary threats, and that the key to developing museums for visitors is 'the show' (i.e. the interpretation and offer that is 'sold' to visitors) as this can boost visitors and profile.
- Secondly, however, it is equally clear that the fundamental underpinning principle of museums in tourism terms is authenticity. This means that visitors value the scholarship and academic authority that makes museums distinctive from other leisure attractions.

4.10 Despite this, there is strong perception from tourism consultees across the study that 'many museums don't do tourism'. This tends to be allied to a concern that if the sector does not increasingly focus in general terms upon communicating and advocating its tourism opportunities (rather than the need for funding) many will face significant challenges in terms of future viability.

4.11 A number of RDA and regional tourism consultees highlighted that engagement with the sector tended to be linked to funding, with museums often approaching RDAs for funds. Whilst there are good examples of RDA funded investment into museums, the case is typically best made on a strong economic rationale.

This can be illustrated by the example of Advantage West Midland's investment in a number of museums-related developments in the region. A notable example is with the **Ironbridge Gorge Museum Trust** in a project which demonstrated a clear economic rationale, made on the basis of delivering clear returns on investment in terms of jobs created and sustained, along with the projected economic benefits to Shropshire and the West Midlands of increased visitor numbers.

The investment into Blists Hill Victorian Town, combined with the stay at home effects of the recession and Ironbridge's 300th anniversary celebrations generated over 530,000 visits for the 10 months up to the end of October 2009, representing a 23% increase in paying visitors on the previous year.

4.12 This issue of engagement is not limited to tourism, with a number of RDA consultees noting that engagement with the cultural sector more generally at the regional level is problematic, with some RDAs not yet engaging with the new regional cultural arrangements.

4.13 In addition, some regional consultees noted that the reorganisation of MLA Council has impacted upon the capacity of the organisation in the regions, and that this has limited the opportunities for engagement.

4.14 In general terms, those museums that are better organised and are more commercially focused tend to be more sensitive to tourist need. However there is a consensus that there is a significant 'tail' of museums in all regions that struggle in this regard and museums of all types and sizes will need to become more commercially minded – not simply for tourism reasons, but because increasing visitor numbers is core to future viability.

4.15 In this context, it is useful to consider the impact of different governance types on the ability of museums to focus on tourism priorities:

- **Independent museums** and museums trusts are seen to have specific advantages in terms of focus and greater freedom to be entrepreneurial, work collaboratively and take risks.
- **Local authority museums services** tend to be isolated from key internal decision makers, and often have a range of community focused priorities to satisfy.
- **Museums Trusts** find it easier to influence external partners. They tend to understand local authority priorities and the RDA policy approach, but have the ability to make decisions and take risks.

4.16 There are a range of explanations as to why independent and trust museums are better able to engage with tourism that have been derived from consultation, including:

- Lack of tourism and economic priorities and outcomes for local authority museums services, which leads to little expectation that museums officers engage with tourism or are required to increase visitor numbers (due to a focus on corporate priorities and resident participation through NI10).
- Culture in general, and museums in particular, slipping further down the organisational hierarchy in local authorities.
- Relationships with DMOs from local authorities tend to be with economic development and not cultural services.

4.17 A number of stakeholders raised the free admissions policy of museums in the context of tourism. Many acknowledged that free admissions as a policy has been a significant boost to much of the sector, and is now very well established. Whilst evidence suggests that visitor spending still occurs, there are some concerns (from other attractions) that it can result in unfair competition, and (from tourism development professionals) that it can confuse the market place.

4.18 Finally, it is worth noting that a number of tourism stakeholders were not aware of MLA Council ahead of engaging with this study, and a number of consultees highlighted examples where museums where not aware of the work of their DMO. This reinforces the culture and tourism disconnect that had been highlighted at the national level, and suggests parallels in sub-regions and localities.

Potential MLA sector engagement in tourism

4.19 The messages set out above suggest the need for the MLA sector to focus on three outward facing factors in relation to engagement with tourism:

- Enhancing and evidencing the **economic benefit of its activities**.
- Widening **audience participation and engagement** from groups that typically do not access museums (a factor both out of the scope of this study, and something where significant progress has been made through programmes such as Renaissance).
- Supporting **the 'place' agenda** (museums and archives are where the story of a place can be accessed and enjoyed).

4.20 These factors are supported by a consensus that to achieve this, museums need to be innovative and work in partnership to develop their offer as a 'product' to visitors in order to compete effectively with a range of other cultural and leisure attractions.

4.21 RDAs and Visit England represent a good route by which MLA Council and other cultural partners can influence tourism networks, as it is these organisations that set broad tourism priorities. If they recognise the value of the cultural offer, and its ability to link with place based activity, then they are able to influence the focus of regional tourist boards and DMOs.

4.22 Museums as a sector tended not to be specific as to the actions that it wants from RDAs. The sector in general, and MLA Council in particular, needs therefore to better define what it expects from, and offers to, RDAs. This might include clarity about what the offer of museums is (in tourism and wider economic terms), and the provision of advice to tourism networks in terms of the positioning of the sector to appropriate audiences.

4.23 The survey considered what type of contribution museums, libraries and archives do, or could potentially, make to tourism. The most common issues raised were around:

- The aforementioned natural focus on museums in the tourism context, with a view that libraries have only a very small role to play (with the notable exceptions of libraries that are national attractions in their own right), and that archives have a (niche) role to play in ancestral tourism and providing a sense of place and history for visitors.

One exception to this, relates to Tourism Information Centres, with some suggestions that libraries and/or museums could serve as TICs/visitor information services.

- Museums being key visitor attractions in their own right, or being seen as part of the wider offer once visitors arrive at a destination. As such, there is the potential for museums to contribute towards tourism in terms of international, national, and/or more local/sub-regional visitors. The level of contribution from a museum (and which type of visitor it appeals to) is contingent on the wider location of the museum and the offer it provides.
- Key factors for museums in the tourism agenda that were emphasised included: the fact that they are all weather attractions; that they are family friendly; and that they help to create a sense of place for visitors

- There were many calls to ensure that the offer for visitors/tourists from museums (and archives) was part a wider cultural/heritage offer, and that this requires more/better joining up.
- There was a suggestion that there is a need to ensure that museums offer/ provide more of what the visitor (or general public) wants, not what museums think they want – i.e. that the offer to visitors should be customer driven.
- Finally, whilst it is well accepted that museums (as well as archives and libraries where relevant) do form part of the core offer to visitors/tourists, museums do not currently engage with the tourism agenda in a strategic manner and this needs to be addressed.

Tourism information: potential engagement of the MLA sector

4.24 The potential role of the MLA sector in the reshaping and restructuring of tourism information was discussed with a number of consultees, and was also referred to by survey respondents. The success and profile of a number of websites (such as www.culture24.org.uk in particular) suggest that the cultural sector can play a meaningful role in the provision of cultural tourism information through a range of mediums and outlets.

4.25 From a tourism development perspective, there is clear consensus that the TIC network is in need of attention, and this is clearly not a debate for MLA Council to directly engage in at this stage. However **museums and libraries can play into decisions about TIC location on a case by case basis**, with many tourism practitioners being willing to try a range of approaches based on shared cost and footfall maximisation. The MLA sector, and the wider cultural sectors being (positively) curious about the potential such an approach could have on their facilities and services under the right conditions, is something that has potential and needs further consideration.

4.26 There are currently a number of examples of TICs being located within museums or libraries across the country. However, it is important to note that many consultees (both tourism and MLA sector representatives) noted that the TIC potential of museums or libraries should be a strategic decision based upon a range of factors – including the location of the museums/library in relation to core visitor areas within a locality, and the level of footfall for the facility (library/ museum).

4.27 However there are concerns that tight public sector budgets may result in a decision to co-locate TICs with museums/libraries (or even other local authority one-stop shop facilities) based simply on resources, with potentially negative consequences for tourism information in an area.

4.28 In short, **museums and libraries could be viable options to consider in locality specific approaches to tourism information**. MLA Council should be prepared to take a sector leadership role in supporting any co-location discussions once a strategic debate has been opened about the role and viability of TICs. Any approach needs to be based on the provision of strategic solutions, where it makes sense to do so, on the basis of shared cost and footfall maximisation.

Contribution of museums, libraries and archives to tourism

4.29 In terms of the **current contribution** of the MLA sector to the tourism agenda, the survey shows that, **subjectively speaking**, partners feel museums makes the largest contribution (48.1% describe it as a major contribution, with almost one-third describing it as moderate).

4.30 The contribution of both libraries and archives is regarded to be minor by almost two thirds of respondents (64% and 65% respectively).

Table 4.3: *Please identify the current level of contribution of Museums, Libraries and Archives to the tourism agenda:*

	Over-whelming	Major	Moderate	Minor	None
Contribution of museums	3.8% (4)	48.1% (50)	32.7% (34)	12.5% (13)	2.9% (3)
Contribution of libraries	0% (0)	1.0% (1)	19.6% (20)	63.7% (65)	15.7% (16)
Contribution of archives	0% (0)	2.0% (2)	20.6% (21)	64.7% (66)	12.7% (13)
Source: DC Research Survey; n=102 to 104					

4.31 Looking at potential future contribution, this pattern is repeated, with 43% stating that museums could have a large potential increase in its contribution, and 44% stating there was a moderate potential increase. In total, 87.5% of respondents see at least a moderate potential increase in the contribution of museums to tourism.

Table 4.4: *Please identify the potential future level of contribution of Museums, Libraries or Archives to the tourism agenda:*

	Large potential increase	Moderate potential increase	Small potential increase	No potential increase
Contribution of museums	43.3% (45)	44.2% (46)	9.6% (10)	2.9% (3)
Contribution of libraries	8.9% (9)	29.7% (30)	39.6% (40)	21.8% (22)
Contribution of archives	17.8% (18)	35.6% (36)	35.6% (36)	10.9% (11)
Source: DC Research Survey; n=101 to 104				

4.32 Once again, the contribution of archives and libraries is not rated as highly. However, there is still a view that there is at least a moderate potential increase in both libraries and archives contribution to tourism (30% and 36% respectively) although the most common response is that the potential future contribution of archives and libraries is small.

4.33 **Objectively and robustly evidencing** the contribution of visitors to local, regional and national economies is an issue for tourism in general, and not just museums and the cultural sector. However it is clear that museums and the wider cultural sector need to develop a more 'economics rich' argument.

4.34 In headline terms it is clear that museums make a highly significant contribution to UK tourism. At the national level, the national museums are well established as tourism attractions in their own right (see Section 3 for a summary).

4.35 The museums sector is very good at making the case for its contribution towards a range of sector specific and community focused outcomes, and there has been significant progress in this regard over the past decade. However, to make the case to RDAs there is a need to improve economic evidence of the impact of the sector in regard to visitors, and the potential impacts of its investments and products.

4.36 Moving away from headline national evidence, individual museums tend not to use or work within locality priorities[5], but to operate individually. In addition to this impacting on the position of museums in terms of Local Area Agreement priorities, it also means that museums struggle to convince an economic development audience in general (and RDAs in particular), as to the economic importance of the sector as a whole.

4.37 In parallel, stakeholders from RDAs and regional and local tourism bodies did not feel they understood the economic scale of museums in their areas. This can lead to museums not having the tourism profile with key decision makers that they might be entitled to in comparison to other attractions and accommodation providers.

4.38 Whilst this is sobering for the sector at a time of austerity and imminent funding cuts, elements of the sector are increasingly recognising the importance of tourism and the visitor economy in making the case to support their impact. There was consensus that improving the museums approach to evidence is both feasible and achievable.

5. For a more detailed discussion see The Role of Museums, Libraries, Archives and Local Area Agreements, DC Research for MLA Council, 2009 (http://research.mla.gov.uk/evidence/documents/role-of-mus-lib-arch-nad-local-area-agree-2009.pdf)

4.39 In particular, Trusts and independent museums are already focusing on economic evidence. For example:

- The Association of Independent Museums annual Museum Development Officer conference in 2010 has the theme of **"Tourism and the Visitor Economy"**.
- A number of museums are looking to capture the economic impacts of particular events and exhibitions to support the articulation of their economic role. **Museums Sheffield has commissioned an economic impact assessment of the Victoria and Albert Museum Vivienne Westwood Exhibition** hosted at the Sheffield Millennium Galleries.

4.40 In addition, some consultees highlighted the importance of trend based intelligence in tourism networks. A cost effective approach for the MLA sector to consider might be a **'culture confidence indicator'**, similar in approach to traditional business confidence surveys that track optimism as opposed to trading conditions over time.

Summary

4.41 In general terms there is a **clear consensus that museums need to be sharper, and engage better with tourism networks on a commercial basis**. To succeed in this they have to push DMOs and local authorities harder to get appropriate support. There are a number of instances where museums stakeholders sit on their relevant DMO and regional tourism board. There are significant benefits from museums professionals (including MLA Council representatives) taking on this advocacy role in terms of sector coverage.

4.42 Tourism stakeholders need to better understand the potential role of museums. Their focus is often on accommodation and larger attractions, and they can have a 'blind spot' for museums and for culture in general unless lobbied and guided effectively.

4.43 In terms of evidencing contribution, **there is a need to clearly articulate and demonstrate the contribution of museums, in a tourism/economic context**. This need is well recognised across the sector, and particularly in the current economic climate, there are concerns that there will be ever increasing pressure on museums (and the rest of the cultural sector) to provide clear evidence of their contribution to wider agendas – especially the contribution that they make to tourism and the visitor economy.

4.44 The provision of evidence to support this contribution needs to be articulated in such a way that key audiences outside the sector (including central government, national and regional tourism organisations, Regional Development Agencies and other potential funders) both appreciate and are convinced by the evidence and related advocacy based upon the evidence.

4.45 MLA Council could best support this process by **agreeing with DCMS, RDAs and DBIS what economic outcomes are appropriate** and persuasive going forward. This might include visits and visitors numbers, spending impact of visitors, revenues from ancillary activities (such as catering, shops, and conference/meetings) and visitor perceptions.

5 BARRIERS, STRENGTHS, AND THE ROLE OF MLA

5.1 This section provides an overview of the key barriers and strengths that exist in terms of the MLA sector and tourism, and the potential role of MLA Council in this context.

5.2 It is clear from Section 4 that there is consensus that the tourism potential of museums is significant, and that more can be done to capture visitors and economic value by improvements in approach, commercial practice and the use of economic arguments and evidence.

5.3 Ahead of considering specific barriers, challenges, strengths and opportunities, it is important to consider the strategic options and implications inherent in MLA Council advocating a more visitor focused approach to its sectors in general and museums in particular. With this in mind, there are some key issues and principles that need to be set out in terms of potential, priority and scale.

- For a range of (internal and external) reasons not all museums are likely to have the potential or ability to become more commercially focused and appeal to tourists, and the process by which those that are selected and developed is critical.
- To take forward an approach that supports the better realisation of the tourism potential of museums, MLA Council and partners must be prepared to decide which museums can make the biggest difference, and be prepared to focus support accordingly.
- This does not translate into working solely on the basis of scale. Small museums are just as capable of showcasing their work to visitors, who can provide a major funding opportunity.

Barriers and challenges

5.4 There are a number of specific barriers and challenges that museums as a sector will need to make progress against. In general terms there is a perception that many museums struggle to accept the level of commerciality that is inherent in adopting a more focused approach to tourism and the visitor economy.

5.5 **Perceptions about the word 'museum'** are often linked to school experience of museums, and perceptions about core audiences being 'anoraks' and middle class-middle income visitors. Whilst in many cases these might be outdated and unfair perceptions, this can often be the reality of the challenge in selling museums as viable tourist attractions. As a direct result, a number of (mainly) independent museums tend not to use the term 'museum' in marketing, even though they are run as a museum to the highest curatorial standards.

5.6 A number of stakeholders felt that the trade off, or perceived trade off, between **commercial and curatorial priorities** was a barrier to many museums fully engaging with tourism networks. Some felt that this was not necessarily an opportunity cost issue, as a good museums director should be able to sell the benefits of a commercial approach to curators and vice versa. However, simply in capacity terms, museums may need to make difficult choices about focusing on further developing their tourist market compared to other agendas (community, education etc.).

5.7 Nevertheless there is a perception amongst both cultural and tourism stakeholders that many museums could achieve a better balance between curatorial, commercial and other priorities (especially where there is some complementarity between these objectives) or where a range of opportunities can follow for museums on the back of the increased revenues and profile of focusing on their role for visitors and tourism.

5.8 Attempts by museums to achieve this balance would also help to address some of the lingering (mis)perceptions of museums being seen as educational (and therefore not 'fun'), and not providing a full day out for visitors (especially families). Many museums have not fully exploited their potential role (e.g. as a 'fun' day out, a meeting place, provider of quality eating facilities etc.) that would help to both raise visitor numbers (and revenue) and additionally help fulfil their other non-commercial priorities and objectives.

5.9 It is useful to separately consider the views of the MLA and cultural sectors compared to the tourism and economic development sectors. Both **face to face consultees and respondents to the e-survey from the cultural sectors** (museums, libraries, archives and other cultural organisations) highlighted a range of factors as the main barriers and challenges for museums, libraries and archives in relation to tourism. These include:

- Funding and budget cuts, and question marks over the viability of many museums.
- Low profile of MLA sector services in local authorities restraining / preventing museums taking a customer focused approach.
- Limited marketing budgets.
- The ability of the sector to convince tourism and economic development decision makers of MLA sector's actual contribution and the validity of museums and culture as an economic contributor.
- Lack of joined up thinking between culture and tourism, and lack of awareness of the tourism agenda in cultural professionals.
- Competition from national museums, theme parks, sport events and concerts.
- Accessibility and public transport issues (connectivity etc).
- Traditional / stereotypical perceptions of museums.
- Forward planning and leadership/political skills.
- MLA Council not having a clear position on tourism and economic impacts, and a lack of clarity as to what success for museums in tourism terms might look like.
- Attitudes, and perceptions of attitudes of museums staff to customer service skills, marketing and tourism in general.
- Issues around a split between a tourism / economic focus, and participation / community focus.

5.10 In comparison, **face to face consultees and respondents to the e-survey from a tourism and economic development background** highlighted a similar range of factors as the main barriers and challenges for museums, libraries and archives in relation to tourism. These include:

- Funding and impending budget cuts, and the viability of some museums (leading to pressure on opening hours, events etc.).
- Issues in engaging with local authority museums services.
- Flexibility of opening hours.
- Lack of understanding of, and visibility in, tourism networks.
- Links with VisitEngland and VisitBritain and RDAs.

- 'Old fashioned' perceptions of museums, modern focus on education and learning.
- Policy focus on communities and localities at the expense of visitors and impact.
- Little scope for development for libraries and archives.
- Variances in quality of presentation and customer facing skills.
- Communication with stakeholders.
- Cushioned against market forces, leading to a lack of commercial leadership.
- A lack of development funding to develop tourism role of museums.
- Lack of audience intelligence, and the ability to share evidence across the sector.
- Lack of understanding of the visitor economy, and the role of culture in it.
- Restructuring of RDAs and cultural NDPBs.

5.11 Following on, the survey also identified the most common **factors that get in the way of engagement between museums, libraries and archives and tourism**. These are very strongly aligned to the issues identified above, with some worthy of particular emphasis:

- Lack of resources (financial and people) which means there is little capacity within the MLA sector to engage with the tourism agenda.
- A conflict of priorities – with a focus on local community agendas rather than tourism/visitors agendas by museums, libraries and archives. Also a concern about the conflict between curatorial concerns versus commercial concerns (i.e. more visitors). Linked to this is the view that tourism is just one of many roles for museums/archives and needs to be balanced with the desire to benefit local communities.
- A history of non-engagement/non-participation in tourism agenda by the MLA sector.
- Inability of museum professionals to present the arguments for museums contribution to tourism in a language that means something to senior tourism partners.
- Lack of understanding of the roles between MLA professionals and destination/tourism managers.

- Concerns about relevant knowledge in the MLA sector – including a lack of understanding of the tourism industry, lack of expertise in marketing and promotion, lack of intelligence on which to base marketing strategy, and lack of capacity within MLA organisations to invest in fostering good relations with tourism industry.
- Poor data (or lack of available data) to prove the impact of museums in the tourism agenda (i.e. basic visitor data and economic impact assessments).
- Lack of relevant product from museums, libraries and archives for visitors, and often a concern from tourism partners that the offer/product is based on assumptions rather than market testing.
- The contribution of museums to tourism can be constrained by: the location of the museum relative to key visitor interests; lack of accessibility to the museum; and the pressure on local authorities to scale back opening hours of museums, as without consistent opening times, museums are not helpful as visitor attractions.
- Lack of recognition of the role of cultural organisations in the Destination Management structures.

Strengths and opportunities

5.12 Whilst there are clearly a range of issues to address for museums to maximise their potential as partners in terms of tourism and the visitor economy, there are also a range of key strengths and opportunities that have been highlighted through the consultations and survey responses collected as part of this study. In parallel to the assessment of common barriers, it is useful to compare the key responses from the cultural and tourism/economic development perspectives.

5.13 Both **face to face consultees and respondents to the e-survey from the cultural sectors** (museums, libraries, archives and other cultural organisations) highlighted a range of strengths and opportunities for museums, libraries and archives in relation to tourism. These include:

- Authenticity and uniqueness of museums
- World class museums and art galleries
- Viability benefits to many museums of an increase in visitors
- Enthusiasm, knowledge and experience of staff and volunteers
- The role of heritage and culture as the UK tourism driver, international perceptions of UK as a culturally rich destination.

- Increased understanding of need for sector to have visitor and economic evidence and outcomes
- MLA Council's designated collections programme
- Opportunities for better articulation of the role of museums as a driver for why visitors visit places
- Potential benefits of collaboration through linking together museums and other culturally based visitor activity.
- 2012 Cultural Olympiad opportunities to showcase the sector
- Keenness of the cultural sector to better engage with tourism networks
- Potential to do much more with events and exhibitions
- 'Staycation' trends, and the ability of museums and galleries to be seen as good value during recession
- Free admissions policy (not enough made of this in tourism terms)
- The Renaissance approach
- Potential to tie libraries and museums into revised approach to tourism information.

5.14 Face to face consultees and respondents to the e-survey from a **tourism and economic development background** highlighted a range of strengths and opportunities for museums, libraries and archives in relation to tourism. These include:

- Authenticity and uniqueness.
- Strong sense of gravitas – a research led approach is a key marketing strength
- Product: Good or potentially good offers improving over time
- Tourism research underlining the importance of the heritage offer to visitors
- Nationally important collections, and ensuring that tourism and museums stakeholders work together to ensure the most is made of them
- Major improvement of quality in national and key regional museums (including Renaissance hubs)
- The role of DMOs as marketing specialists as a mechanism to support sector approaches to audience development
- The ability and potential to mix fun and education

- The potential for collaboration between museums and other culture providers – sharing resources and good practice
- The credibility and capacity vested in community involvement and volunteers
- Positive perceptions as to the affordability of the of the UK's cultural offer
- 2012 and the Cultural Olympiad
- The emerging place agenda, and the potential to develop local distinctiveness through heritage and culture.
- Signs that the sector is recognising the opportunities of digital technology, and recognition that more can be done to engage with audiences and visitors in different ways
- Potential for the MLA sector to have a role in new approaches to tourism information in places.

5.15 In addition, the survey also identified the **most common factors that help with achieving engagement of museums, libraries and archives with tourism**. These are very strongly aligned to the issues identified above, with some worthy of particular emphasis:

- The strength of the offer from museums to visitors, and recognition of that strength of offer by tourism partners.
- The willingness of individuals in the MLA sector to engage with tourism – and the strength of the key personalities involved in this engagement.
- Understanding of the tourism agenda (including its needs, language and drivers) by the MLA sector and ensuring that tourism partners see the links/contribution of museums, libraries and archives to their agenda. This includes making sure that the MLA sector knows who within the tourism structures to engage with.
- Appreciation from the MLA sector that effort needs to be put into engaging with tourism partners.
- Ensuring that there is a mutual understanding of roles and responsibilities between the MLA sector and tourism, which can be supported/helped by the existence of appropriate forums for regular updates and liaison.
- Recognition of the tourism (economic) value of museums – from the MLA sector and from tourism partners. In addition, calls from tourism partners for tourism's contribution to the economy to be recognised and have support ('not just lip service') from key players such as RDAs and local authorities.

- Joint working between museums, cultural, and heritage sector(s), including good marketing and promotion.
- Ensuring that the wider museums/MLA offer caters for visitors (i.e. the provision of good facilities at museums).
- Closer working between MLA services and tourism officers located within local authorities.

Role of MLA Council

5.16 In terms of the role of MLA Council, the survey shows that the majority of respondents feel that the current contribution of **MLA Council in supporting the sector's role in tourism is minor at all geographic levels** – local, sub-regional, regional and national. The most positive aspects are at the regional level and national level, where there is a significant minority (around one third) of respondents that think the contribution of MLA Council is moderate.

Table 5.1: *How would you describe the current contribution of MLA Council to supporting the contribution of Museums, Libraries and Archives services towards the tourism agenda?*

	Very strong	Strong	Moderate	Minor	None
Locally	0.0% (0)	11.0% (9)	17.1% (14)	45.1% (37)	26.8% (22)
Sub-regionally	0.0% (0)	7.4% (6)	21.0% (17)	43.2% (35)	28.4% (23)
Regionally	2.4% (2)	9.8% (8)	32.9% (27)	32.9% (27)	22.0% (18)
Pan-regionally	1.3% (1)	5.1% (4)	30.8 (24)	37.2% (29)	25.6% (20)
Nationally	2.5% (2)	7.6% (6)	32.9% (26)	36.7% (29)	20.3% (16)
Source: DC Research Survey; n=79 to 82					

5.17 In terms of the potential future contribution of MLA Council in this role, there is certainly a recognition that the contribution could increase, with a moderate potential increase being the most common response (41% to 48% depending on the geographic level), followed by large potential increase as the next most common response (24% to 38% depending on the geographic level).

Table 5.2: *How would you describe the potential future contribution of MLA Council to supporting the contribution of Museums, Libraries and Archives services to the tourism agenda?*

	Large potential increase	Moderate potential increase	Small potential increase	No potential increase
Locally	30.5% (25)	41.5% (34)	20.7% (17)	7.3% (6)
Sub-regionally	23.8% (19)	47.5% (38)	22.5% (18)	6.3% (5)
Regionally	30.9% (25)	42.0% (34)	21.0% (17)	6.2% (5)
Pan-regionally	29.5 (23)	41.0% (32)	23.1% (18)	6.4% (5)
Nationally	38.0% (30)	41.8% (33)	15.2% (12)	5.1% (4)
Source: DC Research Survey; n=84				

5.18 In terms of the key tourism partners and stakeholders that MLA Council should engage with, and their level of importance, the results are summarised in the Table below.

Table 5.3: *Who do you think are the key tourism partners/stakeholders for MLA Council to engage with in their support of the tourism agenda, and how important is engagement with them?*

	Critical partner to engage with	Important partner to engage with	Useful partner to engage with	Not important to engage with
Visit Britain / Visit England	76.7% (66)	16.3% (14)	7.0% (6)	0.0% (0)
The National Museums	43.5% (37)	37.6% (32)	17.6% (15)	1.2% (1)
Other national organisations	13.7% (10)	34.2% (25)	46.6% (34)	5.5% (4)
Regional Development Agencies	51.2% (43)	29.8% (25)	16.7% (14)	2.4% (2)
Regional Tourism Bodies	68.6% (59)	24.4% (21)	5.8% (5)	1.2% (1)
DMOs/DMPs	48.2% (40)	36.1% (30)	12.0% (10)	3.6% (3)
Local authorities (including TICs)	55.8% (48)	33.7% (29)	7.0% (6)	3.5% (3)
Locality partnerships	25.6% (21)	47.6% (39)	20.7% (17)	6.1% (5)
Other visitor attractions	22.6% (19)	44.0% (37)	29.8% (25)	3.6% (3)
Source: DC Research Survey; n=86				

5.19 These results show that Visit Britain/Visit England (77%), followed by Regional Tourism Bodies (69%) are the most critical partners to engage with. These partners are followed by local authorities (56%), Regional Development Agencies (51%), DMOs/DMPs (48%) and finally the National Museums (44%).

5.20 When asked to consider current levels of engagement with these partners, the majority of respondents did not know how well engaged the MLA sector was with each of these partners. Of those that were able to say, only with local authorities did the majority of replies state that there was a moderate level of engagement. With all other partners, the most common response was either minor level of engagement or no level of engagement at all. Those partners with whom no engagement was the most common response were DMOs/DMPs and locality partnerships (including town centres and place specific groups).

Summary

"Ask not what tourism can do for museums...but what can museums do for tourism".

5.21 Whilst the above paraphrasing of Kennedy's famous speech is used to illustrate a point (a point made in such precise terms by a consultee), it underlines a consensus from economic development and tourism stakeholders that signifies a necessary shift in approach from museums as a sector. Tourism is a sector that has significant value to the UK economy, and in an economic and tourism policy climate that is increasingly directing investment into areas of growth potential, it makes sense for museums and the cultural sector more widely to position itself accordingly.

5.22 In this context, both distinctiveness and commercial sensitivity are seen as vital to the ability of the museum sector to be competitive in a crowded market place; museums have got to stress authenticity and uniqueness –experiences that cannot be accessed by any other means.

5.23 Museums as 'edutainment' and the investment leveraged into the sector by programmes like Renaissance have been a very positive development in shaping the museum approach to tourism, and the progress made in the last decade is acknowledged by many. Nevertheless, many stakeholders felt that there is much more that can be achieved, with key opportunities and actions including: networking across attractions; using commercial marketing approaches; and developing customer care skills with staff.

6 NEXT STEPS AND RECOMMENDATIONS

6.1 This section of the report builds upon the analysis from Sections 1 to 5, highlights the key findings from the study, and identifies actions for a range of partners.

Summary of key findings

6.2 In general terms, there is a feeling across both the cultural and the tourism and economic development sectors that services in both are likely to become targets for severe budget cuts in the near future.

- It is clear **that many museums are going to face increasing dilemmas in terms of viability**. This is going to result in some very difficult discussions which will need to be well handled, and tourism and economic factors will inevitably be an element in any viability discussions.
- In addition, **the tourism sector is also facing a period of change**, with the anticipated publication of the Visit England Strategy, and the potential threats to RDAs and local authority spending on tourism likely to result in further changes to the mechanism by which tourism support and destinations are managed into the medium term.

6.3 Whilst this context is pessimistic, the evidence presented in Sections 4 and 5 suggest that there is plenty of **scope for the museums sector in particular to enhance its approach to tourism and the visitor economy**. If MLA Council accepts this assessment, and decides that tourism and the visitor economy is increasingly important to a key element of its core activities, then there is a clear need to investigate mechanisms to encourage, guide, and incentivise a more tourism focused approach from relevant museums.

In simple terms, taking a more focused approach to tourism is about audience development for museums – understanding demand and opportunity, and tailoring a museum's offer accordingly.

6.4 At the strategic level this might include developing economic sustainability and viability targets and outcomes, and inviting museums to bid for funding to improve facilities in exchange for stretching targets in terms of increased visitors and collaborative working. This will provide potential support solutions, but the entrepreneurism and creativity will need to come from museums themselves.

6.5 To develop their commercial potential, tourism focused museums need to begin to create an economic cycle that supports activities to raise revenues. This will allow curators to resource new developments and exhibitions, making museums spaces to enjoy for all visitors (including tourists).

Next steps and recommendations

6.6 The evidence presented in this report suggests there is a rationale for tourism to be seen by MLA Council as a key part of the solution to supporting the viability of museums, and not just to be considered as an issue in its own right. Additionally, the evidence provided by consultation and survey responses strongly suggests that there is need to take a selective approach, and to do fewer things better.

6.7 It therefore follows that there are range of possible actions and activities that MLA Council could support. These are organised into the following headings:

- Developing a medium term strategic approach for MLA Council.
- Short term actions for MLA Council.
- Short term actions for the MLA sector.
- Short term actions in partnership with tourism stakeholders.

Developing a medium term strategic approach for MLA Council

6.8 The findings from Sections 4 and 5 demonstrate that tourism can be an important element in the strategic approach to addressing the viability challenge that faces the MLA sector generally, and museums in particular. Any strategic approach will require the buy-in of the MLA sector, and will provide the opportunity for MLA Council to influence DCMS, the other cultural NDPBs, and the Regional Development Agencies.

6.9 Whilst in the short term there are a number of macro level uncertainties (not least a general election, which may result in structural change to many of the organisations engaged in both culture and tourism), it is clear that there is a strategic role for MLA Council that can be developed in the medium term.

6.10 There are three key elements in taking forward a strategic approach to tourism for MLA Council as an organisation:

- **Internally:** Increasing corporate knowledge of tourism, and the role of museums, libraries and archives in tourism. This includes understanding tourism structures and MLA Council's role in them.
- **Action Planning:** To take tourism forward, including a timeline for relevant strategy development, and a clear understanding of the tourism role of the field teams. This might include altering the direction of certain programmes to maximise tourism potential.
- **Externally:** Development of a MLA Council tourism position statement to articulate its tourism role and its ability to contribute to tourism priorities.

Short term actions for MLA Council

6.11 It is clear that museums and tourism as sectors need a partner to show leadership in taking forward the future role of museums and the cultural sector in supporting tourism and the visitor economy. Whilst MLA Council does not directly support or fund the entire museums sector, there is consensus that it is best placed to drive this agenda forward, and this process could include the following actions:

- Providing advocacy and leadership to the MLA sector, and communicating the tourism role for museums to local authorities and to key tourism stakeholders. This should include considering the inclusion of RDA and/or regional tourism leads onto the 'new' regional cultural arrangements (which has happened already in some places), and also consider ensuring that tourism/visitor economy is included in the new regional action plans.
- Establishing MLA Council as an 'honest broker' for a range of cross sector activity and discussion, which might include:
  - Piloting an approach that groups museums into clusters that can be understood and marketed by tourism stakeholders.
  - Maximising the impact of touring collections and loans from other museums (including, national museums and designated collections).
  - Investigating the scope to support further museum engagement in a revamped Visitor Attractions Quality Assurance Scheme (VAQAS) approach, perhaps including a dedicated museums element if appropriate.

  - Supporting, animating and piloting innovative approaches to marketing (with suggestions made through consultations including a 'local museums i-phone app', a scheme that cross markets museums and heritage attractions on the basis of consumer patterns (such as 'if you liked that...you might wish to try this...').

- Supporting the improved and consistent development of tourism and visitor economy evidence of impacts on places and regions, and work with RDAs and tourism stakeholders to make the case for investment in museums on the basis of an evidenced economic rationale and return on investment.

- Work with museums and tourism professionals to help them raise the overall quality and profile of the museums tourism offer (with Renaissance being well placed, and well recognised, as the most appropriate route for this).

- Taking a strategic look at the role of school visits to museums. This is an under-utilised route which could be used as a family marketing opportunity. However, a number of consultees felt that museums currently tend not to take a tailored approach to this market.

- Link together tourism activity across the other NDPB's and national peers (such as the National Trust).

6.12 Progress could be made in the short term by convening a series of workshops to bring together tourism and museums/cultural stakeholders to look at obstacles and opportunities for both groups at a strategic level. This approach could take place on a regional basis. This could be led and facilitated by MLA Council and the relevant regional tourism body, and could serve to further focus and calibrate actions resulting from this study.

6.13 MLA Council could best support the evidencing of impact by **agreeing with DCMS, RDAs and DBIS what economic outcomes are appropriate** and persuasive going forward. This might include visits and visitors numbers, spending impact of visitors, revenues from ancillary activities (such as catering, shops, and conference/meetings) and visitor perceptions.

Short term actions for the MLA sector

6.14 There was consensus across consultees that museums in particular could improve their credibility and attractiveness to tourism networks by being seen to be **taking proactive and commercially focused steps** themselves. This could include:

- More **flexible opening hours** in high footfall tourism areas (the argument being that Sunday closing and 10am to 5.30pm weekday opening hours are not aligned with modern cosmopolitan expectations from either visitors or local residents).
- Maximising **'drop in' trade** either from short exhibit specific visits or the use of museum facilities as business venues.
- Proactively **supporting PR opportunities**, and making the **best possible use of touring exhibitions**, especially those from internationally recognised collections (including the 131 designated collections held in 104 organisations across England).
- Taking up opportunities for training and staff development provided by RDAs and DMOs (such as tourism leadership training in Yorkshire and the Humber, funded by Yorkshire Forward).

Encouraging museums to collaborate in regions

6.15 Building on the recommendation that MLA Council could usefully pilot an approach that groups museums into clusters that can be understood and marketed by tourism stakeholders, there is a need to encourage museums to better collaborate in presenting themselves to tourism stakeholders.

6.16 The sector has already made significant progress in this regard, with Renaissance as a programme being regarded by a number of consultees as a good mechanism by which museums can come together in regions to **create critical mass and engage at a strategic level**.

6.17 In Yorkshire this approach is being further developed with the creation of the **Yorkshire Museums Directors Conference**. This brings together a range of local authority, trust, and independent museum directors to discuss a range of issues. It has a tourism sub-group and is developing an approach to support tourism development, providing an interface to which Yorkshire Forward, Welcome to Yorkshire, and the cultural agencies can engage Yorkshire Museums as a collective.

6.18 There are a number of potential benefits of this approach:

- It presents a coherent facade for the sector to engage with tourism networks – to articulate the case and not provide partners with the opportunity to argue that the sector cannot provide a single point of engagement.
- It could provide a peer process to identify, on a region by region basis, which museums, and groups of museums, have the potential to develop as tourist attractions and increase visitor numbers significantly to both their benefit, and the benefit of the region.

6.19 Finally, in terms of working with the national museums, many consultees have expressed a keenness to better develop touring exhibitions, with national museums providing 'blockbuster' exhibits to regional museums, building on a number of strong links that the British Museum, the V&A and others have with regional and local counterparts.

Short Term Actions in partnership with Tourism

Marketing and product development

6.20 It is clear that there needs to be a revised approach as to how museums are 'sold' to local visitors, day tripper and staying visitors. In museums (and groups of museums) that can be identified as having latent tourism potential this might involve:

- Coordinating and collaborating with, complementary attractions and activities (such as festivals, events etc), and promote to accommodation providers to provide a soft recommendations based tourism information approach
- Segmenting the museums market (linking specialists, niche, thematic and geographic museums together).
- Getting retail and catering provided at a level appropriate to target markets (in partnership with product brands if necessary/appropriate).

6.21 Visit England and DMOs are professional marketing agencies, and as such represent resources that should be better exploited by the museums sector. Museums in tourism terms are a product, and can be marketed as such. It follows that there is a clear role for tourism partners in taking and promoting new developments and collaborative approaches from both MLA Council and the sector to the market place.

Tourism Information: Potential engagement of the MLA sector

6.22 The potential role of the MLA sector in the reshaping and restructuring of tourism information was discussed with a number of consultees, and was also referred to by survey respondents. The success and profile of a number of websites (such as www.culture24.org.uk in particular) suggest that the cultural sector can play a meaningful role in the provision of cultural tourism information through a range of mediums and outlets.

6.23 **Museums and libraries could be viable options to consider in locality specific approaches to tourism information.** MLA Council should be prepared to take a sector leadership role in supporting any co-location discussions once a strategic debate has been opened about the role and viability of TICs. Any approach needs to be based on the provision of strategic solutions, where it makes sense to do so, on the basis of shared cost and footfall maximisation.

APPENDIX 1: LIST OF CONSULTEES

Name	Organisation
Kate Barnard	Arts Council England
Matthew Tanner	Association of Independent Museums / SS Great Britain
Nigel Russell	AWM
John Orna-Ornstein	British Museum
Ian Stephens	Cumbria Tourism
Dan Pillay	DCMS
Grahame Catt	DCMS
Keith Brown	East of England Tourism
Graham Long	EEDA
Ruth Hyde	EMDA
Paul Brookes	EMDA
John Davies	English Heritage
Libby Grundy	GOSW
Steve Miller	Ironbridge
Deborah Evans	LDA
David Friesner	Leicestershire Promotions
Steve Skelton	LGA
Penny Baker	Lincolnshire Tourism Ltd
Tim Manson	Marketing Birmingham
Roy Clare	MLA Council
Jon Finch	MLA Council
Sue Wilkinson	MLA Council
Jenny Ngyou	MLA Council
Wendy Parry	MLA Council
Jo Wooley	MLA Council (Workshop attendee)
Liz Johnson	MLA Council (Workshop attendee)
Nathan Lee	MLA Council (Workshop attendee)
Neil White	MLA Council (Workshop attendee)
Jo Dimitri	MLA Council (Workshop attendee)
Steve Murray	MLA Council (Workshop attendee)
Paula Bricki	MLA Council (Workshop attendee)
Isobel Siddons	MLA Council (Workshop attendee)
Trevor Gough	MLA Council (Workshop attendee)
Mark Taylor	Museums Association
Nick Dodd	Museums Sheffield
Janet Thompson	Museums Sheffield
Brian Hayton	National Railway Museum
Olivia Morris	National Trust
Michael Dixon	NMDC
Katherine O'Connor	NWDA
Jane Randall	NWDA
Louise Davis	One NorthEast
Ailsa Anderson	One NorthEast
Alan Searle	SEEDA
Malcolm Bell	South West Tourism
Julia Stuckley	SWRDA
Mike Bedingfield	Tourism South East
Alec Coles	Tyne & Wear Museums
Chris Brown	Visit Chester and Cheshire
James Berresford	Visit England
Ian Tempest	Visit York
Michael McGregor	The Wordsworth Trust
Andy Tordoff	Yorkshire Forward
Janet Barnes	Yorkshire Museums Trust
Michael Thompson	Yorkshire Museums Trust

APPENDIX 2: BREAKDOWN OF SURVEY RESPONSES

As part of the study, a stakeholder survey was sent to key tourism partners, sector professionals from museums, libraries and archives, wider cultural partners and economic development/regeneration partners. This was a web-based survey, which was distributed by a variety of means (direct emails; emails via professional associations; postings on bulletin boards; press releases on key organisation websites and so on).

A total of 128 replies were received from the e-survey that was carried out during November and early December 2009. Once duplicate responses and non-valid replies were taken into account, there were a total of 110 valid replies (although it should be noted that not every respondent replied to every question).

In terms of the split between 'areas of work' of respondents, the Table below shows the results for this question (respondents were able to tick more than one category, hence the total does not sum to 100%)

Which of the following best describes your role?

	Percent	Count
Tourism	36.2%	38
Museums	44.8%	47
Libraries	8.6%	9
Archives	8.6%	9
Culture	13.3%	14
Economic development / regeneration	11.4%	12
Other	13.3%	14
Source: DC Research Survey; n=105		

This table shows that most replies were from people involved in museums, followed by people involved in tourism. Given the recognition discussed earlier in this report about museums having the strongest links to tourism, it is reasonable to conclude that the survey has achieved a good level of response from the museums sector, and from those involved in tourism, and as such the survey results can be assumed to give a broadly representative summary of current views.

APPENDIX 3: SURVEY RESULTS

At which geographic scale does your role within your organisation primarily operate at:

	Percent	Count
Local	36.5%	38
Sub-regional	21.2%	22
Regional	22.1%	23
Pan-regional	1.9%	2
National	12.5%	13
Other	5.8%	6
Source: DC Research Survey; n=104		

Please identify the current level of contribution of Museums, Libraries and Archives to the tourism agenda:

	Over-whelming	Major	Moderate	Minor	None
Contribution of museums	3.8% (4)	48.1% (50)	32.7% (34)	12.5% (13)	2.9% (3)
Contribution of libraries	0% (0)	1.0% (1)	19.6% (20)	63.7% (65)	15.7% (16)
Contribution of archives	0% (0)	2.0% (2)	20.6% (21)	64.7% (66)	12.7% (13)
Source: DC Research Survey; n=102 to 104					

Please identify the potential future level of contribution of Museums, Libraries or Archives to the tourism agenda:

	Large potential increase	Moderate potential increase	Small potential increase	No potential increase
Contribution of museums	43.3% (45)	44.2% (46)	9.6% (10)	2.9% (3)
Contribution of libraries	8.9% (9)	29.7% (30)	39.6% (40)	21.8% (22)
Contribution of archives	17.8% (18)	35.6% (36)	35.6% (36)	10.9% (11)
Source: DC Research Survey; n=101 to 104				

From your perspective, currently how well engaged with tourism is the Museums, Libraries and Archives sector at each of the following levels?

	Very	Moderate	Minor	None	Don't know
At the local level	21.9% (21)	52.1% (50)	20.8% (20)	4.2% (4)	1.0% (1)
At the sub-regional level	12.5% (12)	42.7% (41)	32.3% (31)	5.2% (5)	7.3% (7)
At the regional level	12.5% (12)	35.4% (34)	37.5% (36)	9.4% (9)	5.2% (5)
At the pan-regional level	6.3% (6)	17.7% (17)	40.6% (39)	12.5% (12)	22.9% (22)
At the national level	10.4% (10)	24.0% (23)	37.5% (36)	11.5% (11)	16.7% (16)
Source: DC Research Survey; n=96					

How would you describe the current contribution of MLA Council to supporting the contribution of Museums, Libraries and Archives services towards the tourism agenda?

	Very strong	Strong	Moderate	Minor	None
Locally	0.0% (0)	11.0% (9)	17.1% (14)	45.1% (37)	26.8% (22)
Sub-regionally	0.0% (0)	7.4% (6)	21.0% (17)	43.2% (35)	28.4% (23)
Regionally	2.4% (2)	9.8% (8)	32.9% (27)	32.9% (27)	22.0% (18)
Pan-regionally	1.3% (1)	5.1% (4)	30.8 (24)	37.2% (29)	25.6% (20)
Nationally	2.5% (2)	7.6% (6)	32.9% (26)	36.7% (29)	20.3% (16)
Source: DC Research Survey; n=79 to 82					

How would you describe the potential future contribution of MLA Council to supporting the contribution of Museums, Libraries and Archives services to the tourism agenda?

	Large potential increase	Moderate potential increase	Small potential increase	No potential increase
Locally	30.5% (25)	41.5% (34)	20.7% (17)	7.3% (6)
Sub-regionally	23.8% (19)	47.5% (38)	22.5% (18)	6.3% (5)
Regionally	30.9% (25)	42.0% (34)	21.0% (17)	6.2% (5)
Pan-regionally	29.5 (23)	41.0% (32)	23.1% (18)	6.4% (5)
Nationally	38.0% (30)	41.8% (33)	15.2% (12)	5.1% (4)
Source: DC Research Survey; n=84				

Who do you think are the key tourism partners/stakeholders for MLA Council to engage with in their support of the tourism agenda, and how important is engagement with them?

	Critical partner to engage with	Important partner to engage with	Useful partner to engage with	Not important to engage with
VisitBritain / VisitEngland	76.7% (66)	16.3% (14)	7.0% (6)	0.0% (0)
The National Museums	43.5% (37)	37.6% (32)	17.6% (15)	1.2% (1)
Other national organisations	13.7% (10)	34.2% (25)	46.6% (34)	5.5% (4)
Regional Development Agencies	51.2% (43)	29.8% (25)	16.7% (14)	2.4% (2)
Regional Tourism Bodies	68.6% (59)	24.4% (21)	5.8% (5)	1.2% (1)
DMOs/DMPs	48.2% (40)	36.1% (30)	12.0% (10)	3.6% (3)
Local authorities (including TICs)	55.8% (48)	33.7% (29)	7.0% (6)	3.5% (3)
Locality partnerships	25.6% (21)	47.6% (39)	20.7% (17)	6.1% (5)
Other visitor attractions	22.6% (19)	44.0% (37)	29.8% (25)	3.6% (3)
Source: DC Research Survey; n=86				

From your perspective, how well engaged is the Museums, Libraries and Archives Sector with each of these at the moment?

	Very	Moderate	Minor	None	Don't know
Visit Britain / Visit England	2.4% (2)	22.0% (18)	24.4% (20)	6.1% (5)	45.1% (37)
The National Museums	24.7% (20)	32.1% (26)	3.7% (3)	0.0% (0)	39.5% (32)
Other national organisations	5.1% (4)	15.4% (12)	20.5% (16)	1.3% (1)	57.7% (45)
Regional Development Agencies	1.2% (1)	21.0% (17)	38.3% (31)	4.9% (4)	34.6% (28)
Regional Tourism Bodies	1.2% (1)	17.3% (14)	35.8% (29)	9.9% (8)	35.8% (29)
DMOs/DMPs	1.2% (1)	12.2% (10)	26.8% (22)	25.6% (21)	34.1% (28)
Local authorities (including TICs)	3.7% (3)	34.6% (28)	24.7% (20)	8.6% (7)	28.4% (23)
Locality partnerships	0.0% (0)	11.1% (9)	18.5% (15)	25.9% (21)	44.4% (36)
Other visitor attractions	1.3% (1)	12.5% (10)	27.5% (22)	13.8% (11)	45.0% (36)
Source: DC Research Survey; n=83					

Are you aware of any good practice examples of links between Museums, Libraries and Archives and tourism organisations that help support any aspect of tourism development?

	Percent	Count
Yes	45.8%	38
No	31.3%	26
Don't Know	22.9%	19
Source: DC Research Survey; n=83		

At what level are these examples of best practice?

	Percent	Count
Local	38.5%	15
Sub-regional	41.0%	16
Regional	35.9%	14
Pan-regional	2.6%	1
National	10.3%	4
Source: DC Research Survey; n=39		

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